

Spain Telecommunications Report Q1 2015

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Abstracts

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BMI View: Operators have made significant investments in fibre, as it becomes the main access technology over cable. In Q115, Fibre-to-the-home (FTTH) and DOCSIS technology passed over 10mn and 16mn homes, respectively. We believe regulator CNMC needs to strike a balance between encouraging investment in new technologies and ensuring competitive markets as well as universal coverage.

Main Trends & Developments

Incumbent Telefónica doubled the number of homes passed with fibre from 5.1mn in 2013 to 10.2mn in 2014. Regulator CNMC ruled it must share its network in all but 24 markets.

We forecast muted growth for mobile subscriptions, which are now expected to reach 50.5mn by 2019, but 3G/4G penetration of the market will be much more vibrant, with 40.5mn subscriptions, accounting for 80.1% of the market, by 2019.

Consolidation in the wireline arena - with provincial cable operators now joining the fray - will accelerate the decline in traditional wireline accesses. But this will be mitigated by rising usage of IP telephony services over cable and fibre. There will be 18.8mn fixed voice accesses by 2019.

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