

Spain Telecommunications Report Q2 2016

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Abstracts

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BMI View: The latest data from Spain's telecoms regulator, the CNMC, for the end of 2015 shows that fibre continues to grow as the main access technology for broadband internet services. In December 2015 the EC approved the regulator's proposal to open up Telefónica's fibre network in Spain. Although BMI welcomes this development, we maintain our view that the regulator needs to strike a balance between encouraging investment in new technologies and ensuring competitive markets as well as universal coverage.

Latest Updates & Industry Developments

In December 2015 the European Commission (EC) approved the Comisión Nacional de los Mercados y la Competencia (CNMC)'s proposal to open up Telefónica's fibre network in Spain. Under the regulator's proposal, Telefónica will be required to share access to its network in all of Spain, except in 34 towns and cities where superfast internet is already being offered by three or more operators. Telefónica has threatened to stop the accelerated rollout of its Spanish fibre optic operations if the proposal is approved.

In 2015, Fibre-to-the-Home connections rose by 155,000, surpassing 3.1mn. Most of these belong to Movistar. Total broadband lines reached 13.18mn in December 2015, with Vodafone España gaining a net total of 182,000 lines, Movistar gaining 76,000 and Orange España 1.79mn (a figure that includes the broadband customers served by JazzTel whose acquisition by Orange was finalised in late 2014).

We forecast only gradual growth in the number of mobile subscriptions, which

are now expected to reach 51.218mn by 2020. However, 3G and 4G service uptake will be much more vibrant, with 40.615mn 3G/ 4G subscriptions by 2020 accounting for 79.3% of the market.

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