

Spain - Telecommunications: Plethora of opportunities despite challenges (Strategy, Performance and Risk Analysis)

<https://marketpublishers.com/r/S39BA54BC40EN.html>

Date: June 2017

Pages: 73

Price: US\$ 1,995.00 (Single User License)

ID: S39BA54BC40EN

Abstracts

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SUMMARY

This report provides an in depth analysis of the Spanish telecommunication market, exploring key areas including the market's competitive landscape and key players, technological advancements and innovations, and the current challenges and opportunities set to influence the market. Though Spain has a volatile economy due to political instability and an unemployment crisis, there are growing investments in network upgrades, keeping in line with the Digital Agenda, adopted by the Spanish Government in 2013. Readers can find more detailed information on governmental initiatives to improve the quality of telecom services in the country within the report.

MarketLine's Premium industry reports provide a comprehensive market view including sections on: industry risk & reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, and innovation.

KEY HIGHLIGHTS

Though Movistar enjoys top position, Orange grows faster

With 21.6 million subscription in 2016, Movistar is the market leader. However, the firm's subscription base declined at a CAGR of -1.8% during 2012-2016 as the

company failed to retain postpaid customers. Orange Spain registered the highest subscription growth at a CAGR of 6.0% during 2012-2016 and has the lowest ARPS of US\$13.4. While the churn rate declined for all other operators, Yoigo's churn rate increased from 32.3% in 2012 to 34.5% in 2016.

Regulations expected to erode roaming revenue

The CMT is the regulatory body governing the telecom industry, ensuring transparency and fair competition. However, regulations on roaming and MTRs are likely to have a negative impact on operating profits. The CMT announced its roaming policy in accordance with the EC's decision to remove roaming charges with effect from June 15, 2017. However, it allowed operators to levy a small surcharge to national rates per European Union law during April 30, 2016 to June 14, 2017.

Vodafone launched the first NB-IoT network in Spain

In January 2017, Vodafone launched the first NB-IoT network after modernizing its existing 4G base stations in the 800MHz licensed spectrum frequency band. Huawei and Vodafone joint innovation initiative solutions help customers meet their business challenges and to lead the development of the technology and industry ecosystems.

SCOPE

Risk/Reward Index - enables you to assess the risks and potential rewards of investing in the Spanish telecommunications market in comparison with other European countries.

Industry Snapshot and Industry View - Key Telecommunications Industry Statistics, including fixed/mobile revenue, subscriptions, churn, market share, and ARPS, are analyzed to reveal the key issues and trends that drive market performance in the Spanish telecommunications market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investments in the Spanish telecommunications market.

Industry Benchmarking - Benchmark how the Spanish telecommunications market is performing compared to the regional and global markets in terms of fixed or mobile revenue, subscriptions, ARPS, penetration, and usage to gauge

potential for growth or market entry.

Competitive Landscape - Analyze and compare the performance of the leading players in the Spanish telecommunications market through the business segment on metrics such as churn, ARPU, and subscriber and revenue growth.

REASONS TO BUY

What is the current market performance and what is it forecast to be in terms of: revenues, subscribers, ARPU, and customer churn?

How are governmental initiatives affecting the Spanish telecom market?

What are the key developments of the market, and which entities were involved?

What are the strengths and weaknesses of the Spanish telecom market; how will the opportunities and challenges effect the market?

Who are the key players in the Spanish telecommunications industry, and how has the competitive landscape changed?

How will the voice segment fare against the growing demands for internet based services in 2021?

What are the primary drivers of the market, in regards to the voice, data, prepaid, postpaid, broadband, and IPTV segments?

What are the notable changes in the financial deals landscape over 2015 to 2016?

Contents

Risk & Reward Index
Industry Snapshot
Industry View
Industry SWOT Analysis
Industry Benchmarking
Industry Performance
Competitive Landscape
Innovation
Deals
Key Developments
Appendix

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