



# Operator business services: Spain forecast 2018–2023



Igor Babić

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## About this report

This report analyses the demand for telecoms services by micro, small and medium-sized enterprises (MSMEs) and large enterprises, expressed in terms of revenue, the number of connections or users and the average revenue per user (ARPU).<sup>1</sup>

The report highlights that operator enterprise revenue in Spain is expected to grow between 2018 and 2023 and identifies the key drivers behind this trend.

It quantifies the market for fixed and mobile voice and data services, IoT connectivity services and other business services such as security, co-location and hosting, enterprise mobility and software-as-a-service (SaaS).

The report is based on several sources, including data from operators, the National Statistics Institute of Spain, the National Commission for Markets and Competition and Analysys Mason's 2017 survey on enterprises' telecoms and ICT usage.

### WHO SHOULD READ THIS REPORT

- Operators that want to identify key areas for revenue growth, both in terms of enterprise segments and individual services.
- Vendors that are considering targeting the business market.
- Third-party service providers seeking collaborative relations with operators.

### REPORT COVERAGE

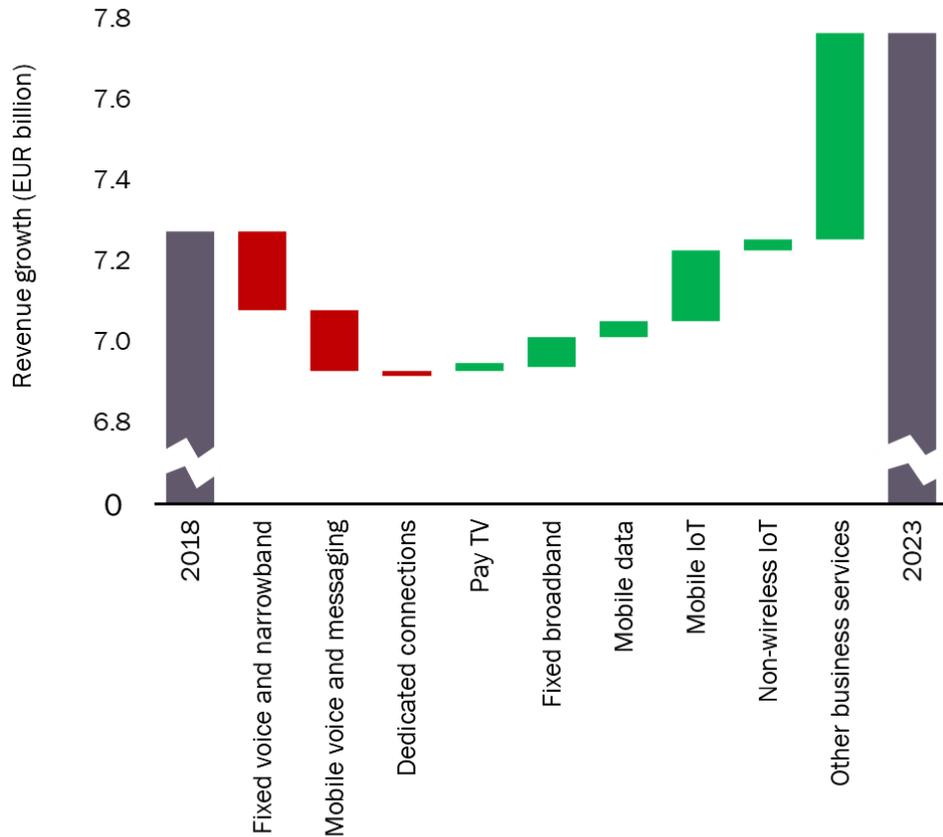
Geographical	Services <sup>2</sup>	
<b>Countries modelled individually:</b> <ul style="list-style-type: none"> <li>▪ Spain</li> </ul>	<b>Mobile:</b> <ul style="list-style-type: none"> <li>▪ Voice, messaging and handset data</li> <li>▪ Mobile broadband</li> <li>▪ IoT connectivity (mobile and LPWA)</li> </ul>	<b>Other business services:</b> <ul style="list-style-type: none"> <li>▪ Unified communications</li> <li>▪ Security</li> <li>▪ Co-location and hosting</li> <li>▪ Private cloud</li> <li>▪ Software-as-a-service (SaaS, public cloud)</li> <li>▪ Platform-as-a-service (PaaS, public cloud)</li> <li>▪ Infrastructure-as-a-service (IaaS, public cloud)</li> <li>▪ Enterprise mobility</li> <li>▪ Desktop management</li> </ul>
<b>Business size</b>	<b>Fixed:</b> <ul style="list-style-type: none"> <li>▪ Narrowband and VoBB</li> <li>▪ ADSL/SDSL, vDSL, FTTP/B, cable, BFWA, other fixed broadband</li> <li>▪ Dedicated connections up to 100Mbps, &gt;100Mbps and up to 1Gbps, and &gt;1Gbps</li> <li>▪ Traditional managed services</li> <li>▪ IoT connectivity</li> <li>▪ Pay TV</li> </ul>	
<b>Segments:</b> <ul style="list-style-type: none"> <li>▪ Micro (0–9 employees)</li> <li>▪ Small (10–49 employees)</li> <li>▪ Medium (50–249 employees)</li> <li>▪ Large (250+ employees)</li> </ul>		

<sup>1</sup> For the complete data set, see Analysys Mason's [DataHub](#).

<sup>2</sup> See service taxonomy in the 'Forecast methodology and assumptions' section of this report.

# Executive summary: increases in revenue from other business services and IoT connectivity services will drive operator enterprise revenue growth in Spain

Figure 1: Change in telecoms operator retail revenue from enterprises by service type, Spain, 2018–2023<sup>1,2</sup>



Source: Analysys Mason

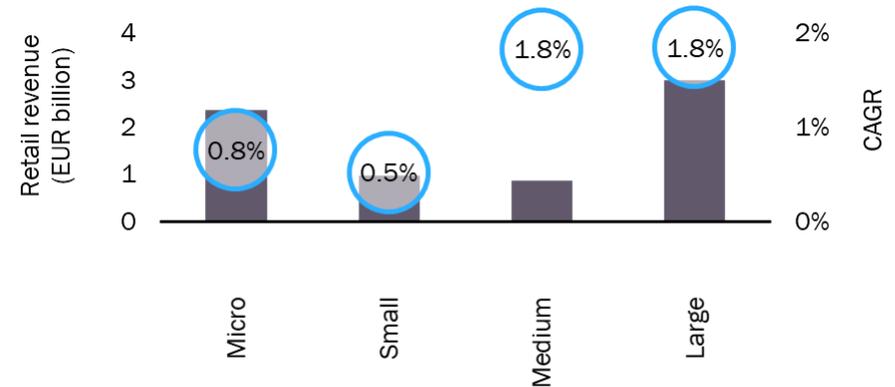
<sup>1</sup> Red denotes a decrease, and green an increase.

<sup>2</sup> See the 'Presentation of results' slide in the 'Forecast methodology and assumptions' section of this report for full definitions of the aggregate categories presented in the figures.

Figure 2: Connections for enterprises and CAGRs by type of connection, Spain, 2018–2023<sup>2</sup>

Connection type	Connections (thousand)		CAGR	
	2018	2023	2014–2018	2018–2023
Mobile handsets	11 140	11 150	1.4%	0.0%
Mobile broadband	778	859	-1.2%	2.0%
Mobile IoT	7040	40 540	23.8%	41.9%
Fixed voice	6060	6500	1.1%	1.4%
Fixed broadband	2875	3051	3.5%	1.2%
Fixed dedicated lines	259	264	0.9%	0.4%
Non-wireless IoT	22 900	29 390	16.6%	5.1%
Pay TV	470	470	0.2%	0.0%

Figure 3: Telecoms operator retail revenue from enterprises in 2018 and CAGR for 2018–2023 by enterprise size, Spain<sup>2</sup>



Source: Analysys Mason



Executive summary

Forecast results

Operator profiles

Regional comparison

Forecast methodology and assumptions

**About the author and Analysys Mason**

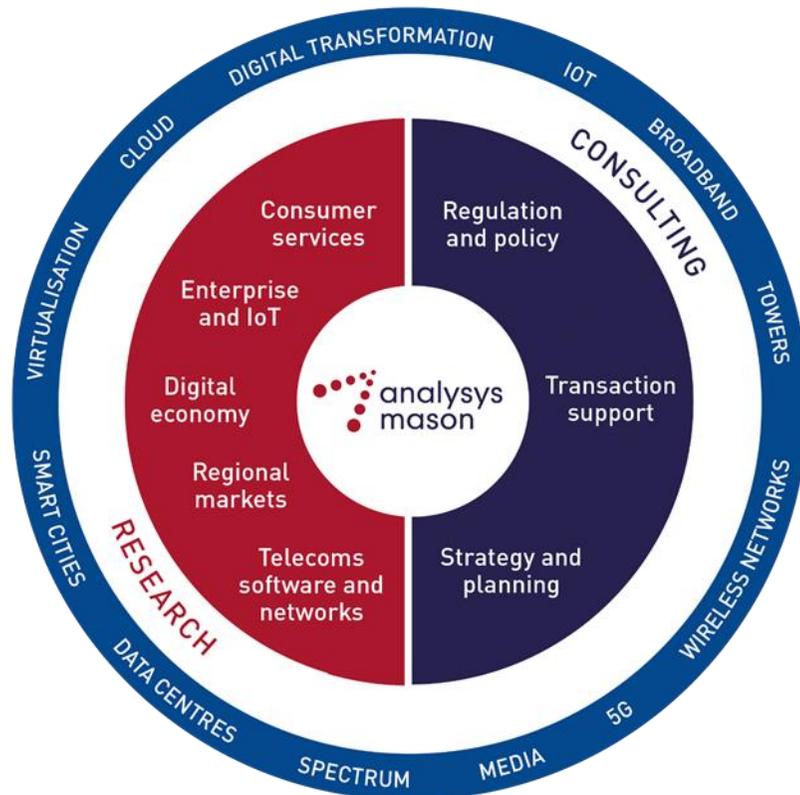
## About the author



**Igor Babić** (Research Analyst) is a member of Analysys Mason's *Operator business services and IoT* research practice and is mainly focusing on market forecasting and enterprise research commentaries. Prior to joining Analysys Mason, he completed a BEng in Engineering Business Management at Warwick and an MPhil in Industrial Systems, Manufacture and Management at Cambridge.

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- Telecoms Software Market Shares
- Network-focused**
  - Next-Generation Wireless Networks
  - Video and Identity Platforms
  - Service Design and Orchestration
  - Automated Assurance
  - Network Automation and Orchestration
  - Digital Infrastructure Strategies

## Customer-focused

- Digital Experience
- Customer Engagement
- Monetisation Platforms
- AI and Analytics

## Digital economy programmes

- Digital Economy Strategies
- Future Comms

## Operator business services and IoT programmes

- Large Enterprise Voice and Data Connectivity
- Large Enterprise Emerging Service Opportunities
  - SME Strategies
  - IoT and M2M Services
  - IoT Platforms and Technology

## SMB ICT programmes

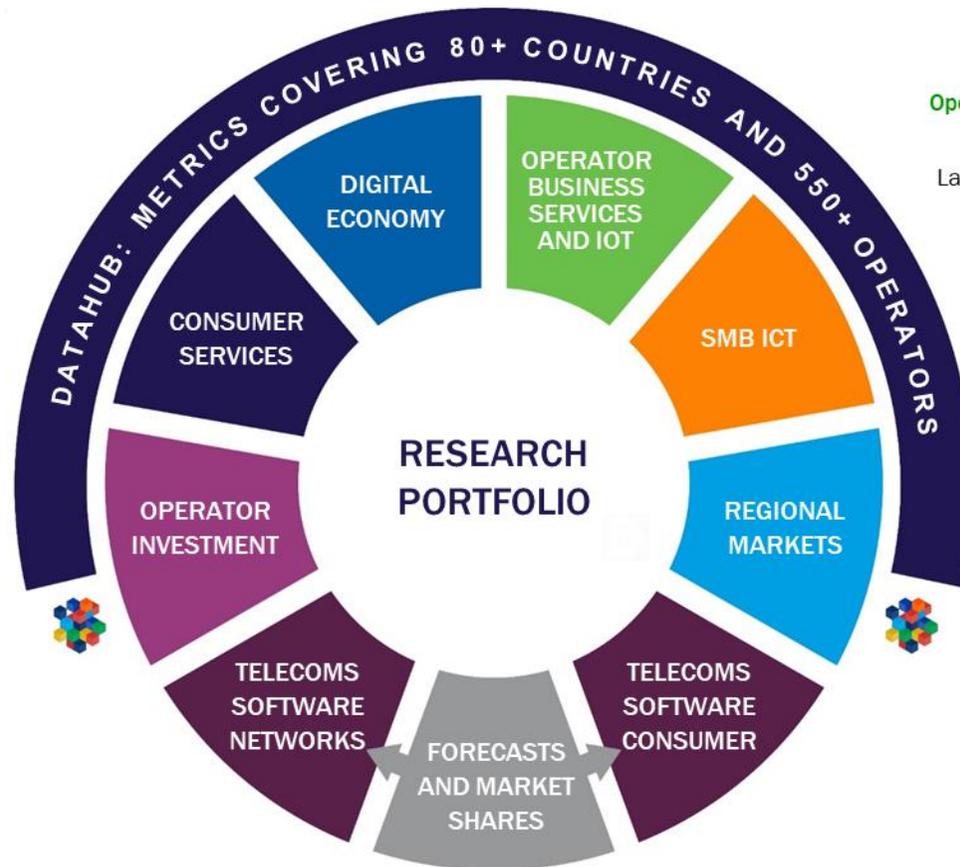
- Managed Service Provider Strategies

## Regional markets programmes

- Global Telecoms Data
  - Americas
  - Asia-Pacific
  - Middle East and Africa
- European Core Forecasts
- European Telecoms Market Matrix
- European Country Reports

## DataHub

- ~2500 forecast and 250+ historical metrics
- Regional results and worldwide totals
- Operator historical data



# Consulting from Analysys Mason

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- Ex-post/abuse of dominance
- Postal sector



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- Technical due diligence
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- Debt and initial public offerings (IPOs)
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- Mid-market financial sponsors

## STRATEGY AND PLANNING

- Commercial expertise
- Technology optimisation
- New digital frontiers

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