



THE MOBILE SECTOR IN SPAIN - REPORT





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The Israel Economic Mission in Spain

Inspired by Innovation, Connected and Coordinated.

The Economic-Commercial Mission at the Embassy of Israel in Spain is a professional unit of the Foreign Trade Administration (FTA) within the Israeli Ministry of Economy and Industry (MOE).

It is also a branch of the Embassy of Israel in Spain whose objective is to promote, improve and facilitate trade, industrial investment and cooperation and R&D agreements between Spain and Israel.

The Economic-Commercial Mission offers Spanish companies, through its various events, a meeting point with the Israeli business community. Our objective is to promote, improve and facilitate trade and investment in different sectors between Spain and Israel.

We work to develop strategic bilateral associations, identifying new opportunities for business collaboration, through business seminars, delegations, exhibitions, scouting and support in the creation of the visit agenda.

The services provided to Spanish entities include: Presentation of investment opportunities in Israel, Search for technology companies/products/solutions in Israel, Organization of incoming/outgoing business delegations and preparation of programs. It also includes preparation of the agenda for the individual business visit to Israel and establishment of connections with government and academic institutes in Israel and information on fairs and exhibitions in Israel.

For further information beyond this report or additional questions, please contact:

Veronica Lorch
Trade Officer

Veronica.Lorch@israeltrade.gov.il

[HOME - Spain - Israel Trade & Economic Office, Embassy of Israel \(itrade.gov.il\)](http://HOME - Spain - Israel Trade & Economic Office, Embassy of Israel (itrade.gov.il))

[Veronica Lorch | LinkedIn](#)





THE MOBILE SECTOR IN SPAIN

Historically, 25 years ago, Spain had one main player in the mobile sector: [Telefonica](#). However, new competitors made their way into the arena, such as [Vodafone](#) and [Orange](#).

As mentioned in [El Economista](#), due to the **liberalization of telecommunications in 2006**, new companies have emerged in the last decade, such as the [MASMOVIL Group](#), and a wide range of virtual mobile operators (MVNO) that complete the national panorama of the sector.

Today, there are still three main operators in Spain: Movistar, Vodafone and Orange, that account for 75.8% of the sector's retail income in the last quarter of 2021, according to the [national commission of markets and competition](#) and [Expansion](#).

A brief look into these main players.

Telefonica is the leading operator in the country with revenues close to 15,000 million euros and more than 18,000 employees on the workforce. It has 4 commercial brands: Telefónica (institutional brand), Movistar, Vivo and O2. Movistar has the biggest visibility, and operates in all of Latin America.

Vodafone is part of the British multinational telecommunications company Vodafone Group, a company that arrived in Spain in 2001 and is considered today the second largest operator. It has a turnover of more than 5,000 million euros and more than 4,000 employees in 2020.

Orange, although French, was forged in Spain in 2006, as a result of the unification of all the firms owned by France Télécom that operated in Spain up to that time. Their results are always modest, compared to its competitors, but also more stable. Its revenue figure has always remained above 4,000 million euros since 2012 and its number of workers has never been below 3,000.

The MASMOVIL Group is considered the fourth largest telecommunications operator in Spain. Its main brands are Yoigo, MÁSMÓVIL, Pepephone, Llamaya and Lebara.



Facts and figures

The mobile and ICT sector in general have been one of the fastest-growing sectors in Spain over the last decade. This, along with digitalization, have been the most important factors in transforming the production model and in stimulating economic recovery in Spain after the pandemic.

As mentioned in [IVC](#), Spain is the highest developed mobile market, after Scandinavia, with a smartphone density of 88%. What's more, it has an average speed of 18 Mbps, Spain has the fastest mobile grid worldwide (USA 7 Mbps).

2021 was a year of strong investments, which amounted to 7,574 million euros, which represents an increase of 50.7% compared to the previous year.

As in previous years, the main driver of investment continued to be the deployment of new generation access networks and mobile networks.

To this purpose, the Spanish Government has created the **Digital Spain Plan 2025**, which features specific strategies to promote technologies that are crucial for Spain: **5G, cybersecurity, Big Data and Artificial Intelligence**.

According to [Invest in Spain](#), "Spain is the country that will receive most funds from the Recovery, Transformation and Resilience Plan (NextGenerationEU): up to 140 billion euros between 2021 and 2026, 23.1% of which will go to the modernization and digitalization of industry".

The Spanish mobile and ICT sector had a turnover of 120 billion euros in 2019, 3.8% of Spain's GDP.

Spain has the largest household fibre network in the EU, which attracts foreign ICT companies and entrepreneurs to choose Spain for its solid telecommunications infrastructure network and excellent connectivity.

The future of the Mobile sector in Spain and the EU

The [Digital Compass](#), Europe's digital transformation strategy for 2030, was presented by the European Commission last March 2021.

According to [Telefonica](#), "This is Spain and Europe's opportunity to establish a policy framework that strengthens key sectors and technologies and strengthen investment and innovation capacities."

The telecommunications industry is one of Europe's strategic sectors, with an added value of 141,500 million euros per year.



The sector is building the infrastructures that are the base for digital and green transformation and accelerating the **technological adoption of all sectors with 5G, edge computing, cloud, Artificial Intelligence, IoT, cybersecurity, among other technologies.**

Spanish operators are taking advantage of the arrival of 5G and betting on the creation of business services. As an example, "Vodafone Spain recently announced, for example, a 5G laboratory to develop solutions with other companies within a metaverse that they have also just created", said the [Business Insider](#).

Additional information:

[Summary and conclusions of the 2021 mobile Report](#)

[The transformation of the telecommunications sector](#)

[Main trends in telecommunications in 2021](#)

[Spanish telecommunications companies and their challenges in 2022](#)