



INFORMATION OF THE ICT SECTOR IN SPAIN

In the ICT sector analysis, ICT Manufacturing and Services companies are included.

With regard to ICT Services, information is collected from the branches of activity of wholesale ICT, IT activities and telecommunications.

In the case of ICT manufacturing, all companies that manufacture electronic components, printed circuits, computers, telecommunications equipment, consumer electronic products and magnetic and optical media are included. With regard to ICT services, this includes the wholesale branches of ICT, computer activities and telecommunications.

Number of companies

In 2016, the number of companies belonging to the ICT sector and the Content amounted to 33,176 companies, 3.3% more than in 2015. For the fourth consecutive year, the number of companies in the TICC sector increased in Spain, although this is a slower pace compared to the last year, in which the increase stood at 4.2%.

The growth of the number of companies in the ICT sector is driven by the two sectors that comprise it: the ICT sector and the Content sector. The ICT sector contributes with 23,427 companies (70.6% of the sector) and the Content sector contributes 9,749 companies (29.4% of the sector). Both sectors grow with respect to 2015, especially the ICT sector with 4%. This trend confirms the good development in which the ICT sector is currently in business creation.

	2011	2012	2013	2014	2015	2016
Sector TIC	19.666	19.520	20.261	21.372	22.524	23.427
Fabricación	865	855	874	907	934	932
Servicios TIC	18.801	18.665	19.387	20.465	21.590	22.495
Comercio al por mayor TIC	2.495	2.502	2.662	2.809	2.864	2.940
Actividades Informáticas	12.617	12.409	13.035	13.975	15.032	15.899
Telecomunicaciones	3.689	3.754	3.690	3.681	3.674	3.656

Source: ONTSI from Social Security

Below is a description of business distribution by regions. There are two autonomous regions that encompass more than half of the companies in the ICT and Content sector. These are Madrid and Catalonia, which host 34% and 21% of the companies in this sector respectively.



The number of companies dedicated to manufacturing in the ICT sector decreased slightly in 2016, specifically -0.2%. Despite the decline, the evolution of the number of companies in the period between 2011 and 2016 has been favorable, as indicated by the compound growth rate of 1.5%. The number of companies in the manufacturing branch is 932, which is higher than the number of companies registered in 2011 (865 companies).

The number of companies belonging to the ICT wholesale trade sector is 2,940, 1.9% more than in 2015. Since 2011, ICT trade companies have not stopped growing, reinforcing the positive trend in which this type of company is immersed. The compound growth rate between 2011 and 2016 amounts to 3.3%. If this dynamic continues, it would not be surprising if ICT trade companies surpassed 3,000 companies in 2016.

The companies dedicated to computer activities are the most numerous (15,899), encompassing more than two thirds of the ICT sector (67.9%). The evolution of the number of companies in this activity has been the most consistent compared to the rest of the branches, as indicated by the compound growth rate of 4.7%

Of all the companies that are part of IT activities in the ICT sector, companies dedicated to other services related to information technology and information technology are the most common, with 6,866 companies, covering 43.2% of the branch . For the fourth consecutive year, the number of companies increases and probably exceeds 16,000 companies in 2017. The companies dedicated to computer programming activities (2,574) and those dedicated to computer consulting activities (2,425) are also important for this branch. Both encompass 16.2% and 15.3% of computer activities, respectively. The two types of companies grew significantly compared to 2015, with increases of more than 10%. However, the communication equipment repair companies are immersed in a negative trend. Since 2011, the companies that are part of this activity are closing every year. Despite this, communication equipment repair companies are still an important part of computer activities. In 2016, the number of companies in this branch represented 8.4% of computer activities, a figure lower than the 2011 records.

Business figure

For several years, the turnover from the ICT sector has not stopped growing. In 2013, revenues amounted to 89,203 million euros. In 2016, business volume once again exceeded the barrier of 100,000 million euros, standing at 105,868 million euros, 7.3% more than in 2015.

Employment

The personnel employed in the ICT sector and the Content amount to 471,860 people in 2016, 4% more than in 2015. Employment continues with the growth path that began in 2013 and the negative trend experienced a few years ago is now overcome. As with the previous two indicators, both sectors generate new employment every year since 2015, something that did not happen in 2014. In that year, despite experiencing the first growth for years, only employment in the ICT sector increased.

Virtually all employment in the ICT sector is concentrated in the ICT services branch (96.1%), while the remaining 3.9% comes from the manufacturing branch. Within ICT services, employment derives the vast majority of IT activities, specifically 69.3%. The employed personnel that comes from the telecommunications companies represent 19.5%, a figure that is noticeably lower than that registered years ago.

	2011	2012	2013	2014	2015	2016
Sector TIC	327.023	317.423	314.072	330.930	354.480	367.906
Fabricación	17.722	15.410	14.462	14.230	14.474	14.478
Servicios TIC	309.301	302.013	299.610	316.700	340.006	353.428
Comercio al por mayor TIC	25.448	24.126	23.458	24.986	25.193	26.557
Actividades Informáticas	199.770	197.926	198.232	215.393	237.266	255.003
Telecomunicaciones	84.083	79.961	77.920	76.321	77.547	71.868

Fuente: Seguridad Social

Investment

Investment was the indicator most affected by the economic crisis that hit Spain since 2008. Without going any further, in 2013 investment in the ICT sector and the Content hit bottom with a figure below 15,000 million euros. However, investment has experienced a positive growth trend in the last three years, the highest of the indicators analyzed. Within the last two years investment has grown significantly, especially in 2015. During 2016, investment in the ICT sector and content has been 19,005 million euros, 9.8% more than in 2015.

	2011	2012	2013	2014	2015	2016
Sector TIC	14.356	12.858	11.816	12.443	14.836	16.229
Fabricación	489	483	403	286	397	566
Servicios	13.867	12.375	11.413	12.157	14.439	15.663
Comercio	892	683	667	760	971	1.354
Actividades Informáticas	7.201	7.624	6.810	6.264	7.782	8.363
Telecomunicaciones	5.774	4.068	3.936	5.133	5.685	5.947

Fuente: ONTSI (datos de inversión estimados)

Source: ONTSI National Observatory of telecommunications and IS.