

16 July 2014

ICT Sector Indicators Year 2012

Main results

- In 2012, the number of companies in the ICT sector increases 8.8%, standing at 48,218.
- Turnover for ICT sector companies decreases 5.9% in 2012 as compared with the previous year, reaching 83,172 million euros.
- The the added value of the companies in the ICT sector was 31,688.5 million euros in 2012, representing a 4.5% annual decrease.
- The number of persons employed in the ICT sector reaches 403,422 persons in 2012, that is, a 0.9% increase.
- 39.3% of companies in the ICT sector carry out innovative activities during the year 2012, and 16.3% carry out R&D activities.
- The ICT sector obtained a negative trade balance of -9,636.2 million euros in 2012, indicating a decrease of 13.8%, as compared with that registered in the previous year.

Turnover for companies in the Information and Communication Technologies (ICT) sector stood at 83,172 million euros in the year 2012, that is, 5.9% less than the previous year. These companies generated an added value of 31,688.5 million euros, 4.5% less than in 2011.

The number of companies in the ICT sector stood at 48,218, that is, 8.8% more than in the previous year. In turn, the number of persons employed in the ICT sector stood at 403,422 persons, with an increase of 0.9%.

Main variables in the ICT sector. Year 2012

Economic data in millions of euros

ICT sector (CNAE-2009)	2011	2012	% variation
Number of companies	44,298	48,218	8.8
Turnover	88,395.2	83,172.0	-5.9
Added value	33,195.1	31,688.5	-4.5
Number of employed persons	399,783	403,422	0.9

Source: Industrial Companies Survey and Annual Services Survey.

Evolution of the number of companies and the number of persons employed in the ICT sector (2008 – 2012)

Both the number of companies and the personnel employed decreased between 2008 and 2009. However, from that year onwards, they registered positive growth rates.

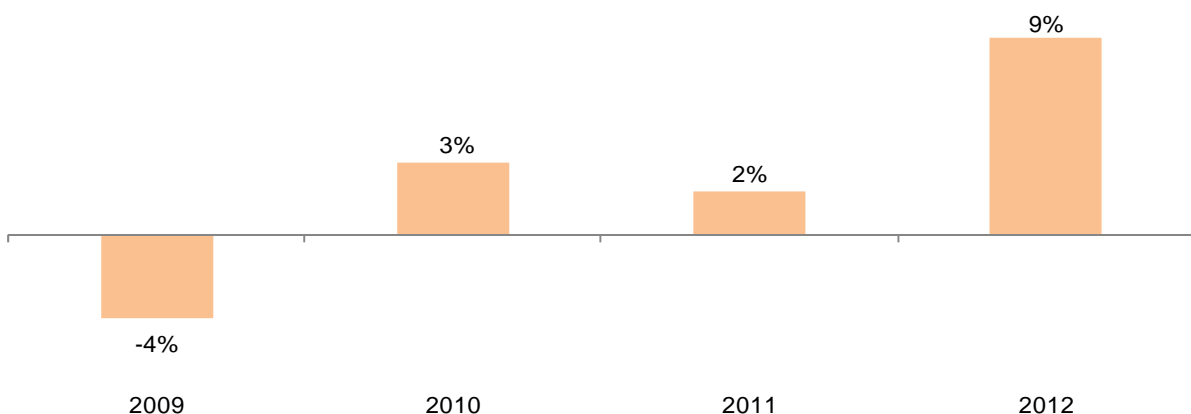
Evolution of the number of companies and employed persons in the ICT sector (2008-2012)

	2008	2009	2010	2011	2012
Number of companies	43,708	42,078	43,451	44,298	48,218
Number of employed persons	415,605	396,395	396,543	399,783	403,422

Source: Industrial Companies Survey and Annual Services Survey

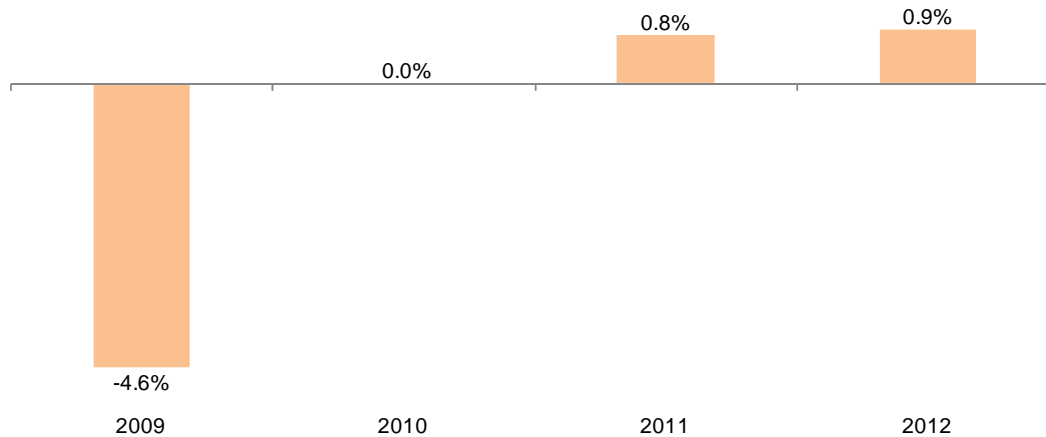
In 2012, the annual variation rate of the number of companies in the ICT sector reached the greatest value of the series, a 9%.

Number of companies. Annual variation rates



In turn, the number of persons employed increased by 0.9% during the last year analyzed.

Number of workers. Annual variation rates



Internal R&D expenditure of ICT sector companies

Companies in the ICT sector invested a total of 995.8 million euros on R&D in 2012. This figure accounted for 14% of the total business expenditure on R&D activities.

Within the ICT services industries, the industry with the greatest expenditure on R&D was *Programming, consultancy and other activities related to IT*, with 596.3 million euros.

Current expenses accounted for 93.3% of the total expenditure on R&D by companies in the ICT sector. In turn, capital expenses represented the remaining 6.7%.

Internal R&D expenditure in the ICT sector. Year 2012

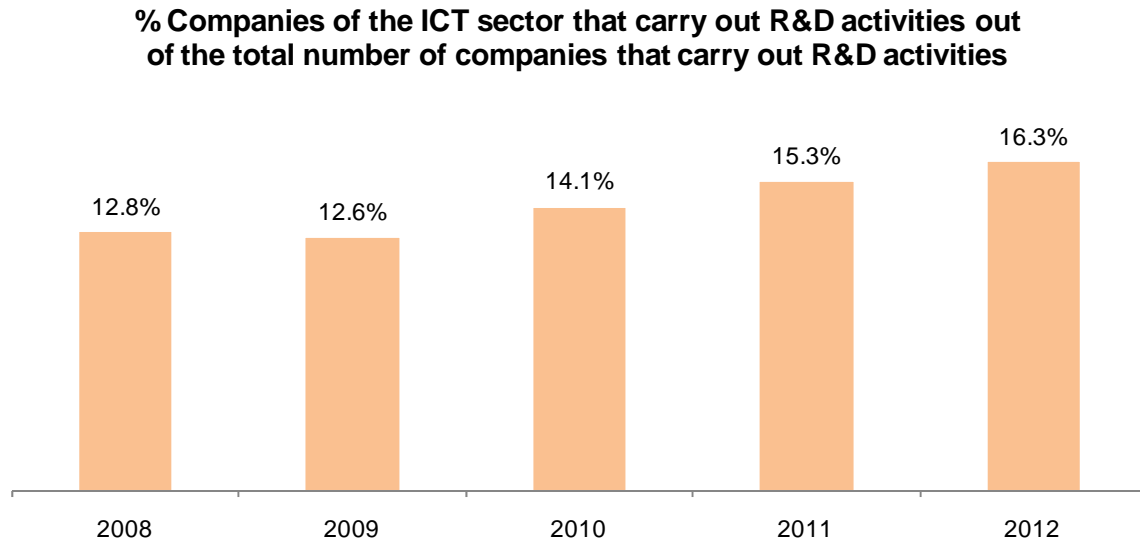
Data in millions of euros

ICT sector (CNAE 2009)	Current expenses		Capital expenses		TOTAL
		%		%	
1. Manufacturing	106.2	94.6	6.0	5.4	112.2
2. Services	823.0	93.1	60.6	6.9	883.6
a. ICT trade industries	58.7	96.0	2.4	4.0	61.1
b. ICT services industries	764.3	92.9	58.2	7.1	822.5
- Software publishing	19.6	96.4	0.7	3.6	20.3
- Telecommunications	134.4	87.3	19.5	12.7	153.9
- Computer programming, consultancy and other activities related to IT	563.9	94.6	32.5	5.4	596.3
- Web portals, data processing, hosting	42.6	89.0	5.3	11.0	47.9
- Repair of computers and communication equipment	3.9	95.8	0.2	4.2	4.1
TOTAL ICT sector	929.2	93.3	66.7	6.7	995.8
TOTAL business sectors	6,338.5	89.3	755.7	10.7	7,094.3

Source: Statistics on Scientific Research and Technological Development Activities.

Evolution of the ICT sector companies that carry out R&D activities (2008 – 2012)

The percentage of companies in the ICT sector that carry out R&D activities increased between 2009 and 2012, reaching 16.3% in 2012.



The annual variation rate of the number of companies in the ICT sector carrying out R&D activities was negative in 2009 and 2010 (–11.4% and –5.9%, respectively). Nevertheless, this trend changed in 2011 (6.0%) and in 2012 it kept growing by 6.6%.

Personnel employed in the ICT sector

In 2012, the ICT sector concentrated 19.2% of the total personnel dedicated to R&D tasks in the business sector, and 18.1% of the total researchers.

Personnel employed in R&D tasks, on a Full-Time Equivalent (FTE), dedicated to R&D tasks in the ICT sector, were 17,167.6. Women accounted for 23.6% of them.

In turn, there were 8,116.7 researchers dedicated to R&D, 22.1% of whom were women.

Within the ICT services industries, *Programming, consultancy and other activities related to IT* was the industry that employed most workers, with a total of 11,297.2 on FTE. Of this figure, 5,348.3 were researchers.

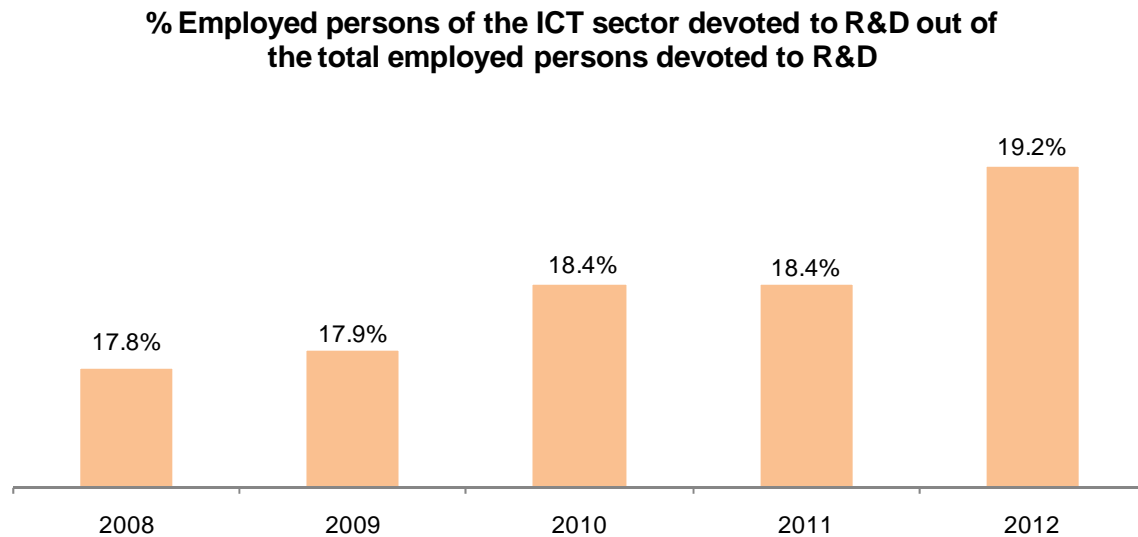
R&D Personnel (in FTE). Year 2012

ICT sector (CNAE 2009)	Total Personnel			Researchers		
	Women	%	TOTAL	Women	%	TOTAL
1. Manufacturing	300.9	15.4	1,951.9	152.9	15.3	1,000.1
2. Services	3,756.6	24.7	15,215.7	1,638.2	23.0	7,116.6
a. ICT trade industries	153.4	21.8	702.5	95.2	18.7	507.8
b. ICT services industries	3,603.2	24.8	14,513.2	1,543.0	23.3	6,608.8
- Software publishing	78.0	18.7	417.6	26.5	13.4	197.3
- Telecommunications	515.2	27.0	1,907.6	169.9	24.7	686.5
- Computer programming, consultancy and other activities related to IT	2,803.2	24.8	11,297.2	1,267.3	23.7	5,348.3
- Web portals, data processing, hosting	190.8	24.3	783.7	74.2	23.0	322.7
- Repair of computer and communication equipment	16.0	14.9	107.1	5.1	9.4	54.0
TOTAL ICT sector	4,057.4	23.6	17,167.6	1,791.1	22.1	8,116.7
TOTAL business sectors	27,380.8	30.6	89,364.3	13,584.3	30.2	44,920.3

Source: Statistics on Scientific Research and Technological Development Activities.

Evolution of the personnel in the ICT sector dedicated to R&D (2008 – 2012)

With regards to the total personnel employed, the personnel employed in the ICT sector dedicated to R&D tasks stood above 19% in 2012, following the growing trend of the last years.



In turn, the annual variation rate of the personnel in the sector increased by 4.1% in 2012, after having decreased 2.9% in 2011.

Companies carrying out innovative activities

During the year 2012, 39.3% of the companies in the ICT sector carried out innovative activities. By sector, 54.7% of manufacturing companies and 37.9% of companies in the services sector carried out innovative activities.

Within the ICT Sector, expenditure by ICT manufacturing industries on innovative activities stood at 136.5 million euros, whereas ICT services companies spent 2,059.3 million euros.

ICT sector expenditure accounted for 16.4% of total business expenditure on innovative activities.

Innovative activities in the ICT sector. Year 2012

Data in millions of euros

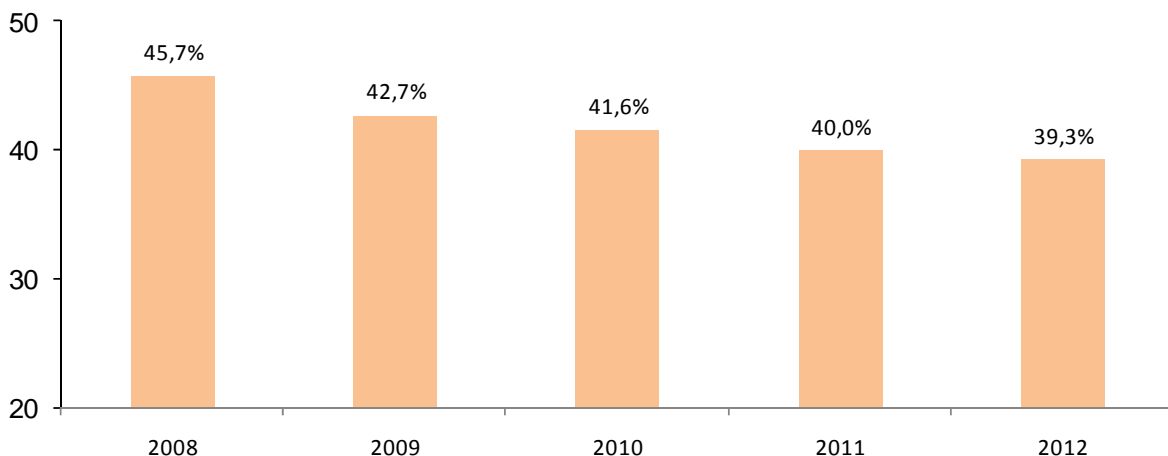
ICT Sector (CNAE 2009)	% of companies with innovative activities	Expenditure on innovative activities	% Expenditure over the Total
Manufacturing	54.7	136.5	6.2
Services	37.9	2,059.3	93.8
TOTAL ICT sector	39.3	2,195.8	100.0
TOTAL business sector	11.5	13,410.3	

Source: Survey on Innovation in Companies

Evolution of companies carrying out innovative activities (2008 – 2012)

The percentage of companies in the ICT sector that carry out innovative activities decreased from 2008 to 2012, from 45.7% in 2008 to 39.9% in the last year analysed.

Companies carrying out innovative activities in the ICT sector on the total companies in the ICT sector



The annual variation rate of said companies also registered a decrease in the last years, as it was -4.0% in 2012, as compared to -3.4% in 2011.

Production value of goods in the ICT sector

According to the Industrial Products Survey, the production value of ICT goods decreased 15.0%, as compared to the previous year, reaching 2,825.5 million euros.

By group, production value maintained the trend of 2011 in *Telecommunications equipments*, *Electronic components* and *Audio and video equipment*, registering decreases of 23.9%, 29.8% and 6.4%, respectively. In turn, *Computer equipment* registered an increase again, as in 2011, increasing 13.6% this year.

Production value of ICT goods. Year 2012

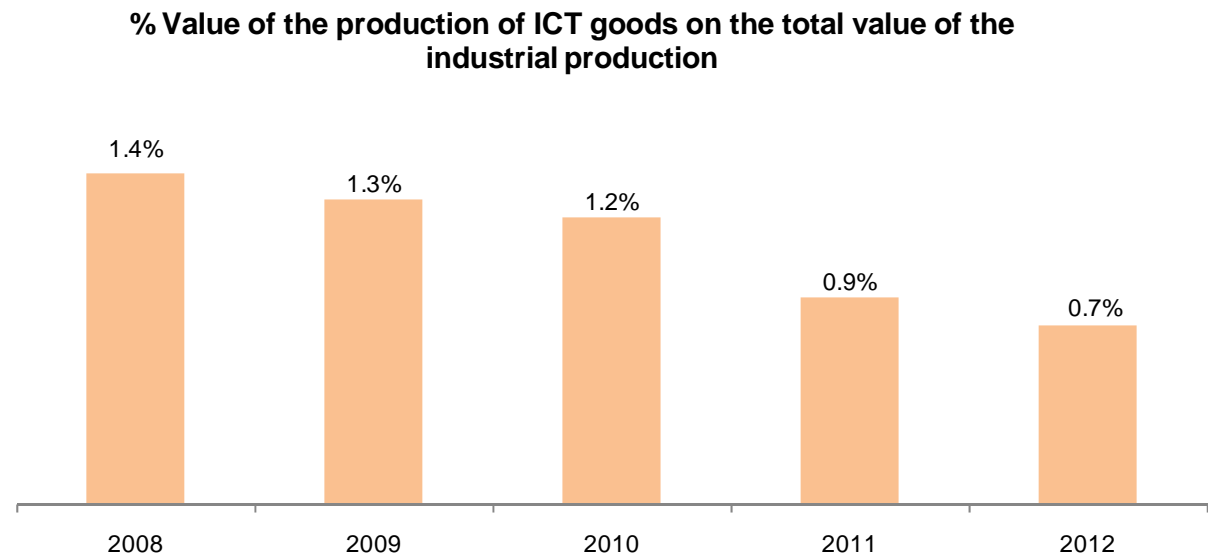
Data in millions of euros

Groups of products (PRODCOM 2010)	Production value	% over the ICT sector total	% over the industrial sector total	% Variation as compared to 2011
1. Telecommunications equipment	418.1	14.8	0.1	-23.9
2. Computers equipment	122.9	4.3	0.0	13.6
3. Electronic components	873.7	30.9	0.2	-29.8
4. Audio and video equipment	289.9	10.3	0.1	-6.4
5. Other ICT products	1,120.9	39.7	0.3	0.8
TOTAL ICT sector	2,825.5	100.0	0.7	-15.0
TOTAL industrial production	377,949.1		100.0	-1.2

Source: Industrial Products Survey

Evolution of the production value of ICT goods (2008 – 2012)

Regarding the total value of the industrial production, the production value of ICT goods in 2012 decreased 0.7%, as compared with the 0.9% of the previous year.



However, while between 2009 and 2010 the variation rate of the production of goods in the ICT sector barely changed (0.8%), in 2011 and 2012 it registered decreases of 23.0% and 15.0%, respectively.

Foreign trade of ICT products

The trade balance of ICT products in 2012 registered a negative balance of 9,636.2 million euros. This trade deficit for the sector was 13.8% lower, as compared with 2011.

Exports reached a total of 4,699.5 million euros, whilst imports reached 14,335.7 million euros.

Amongst the groups of products of the ICT sector, worth noting were the exports of *Telecommunications equipment*, which represented 27.7% of the total for the ICT sector exports. Likewise, worth noting were the imports of *Telecommunications equipment*, that accounted for 33.5% of the total.

Foreign trade of the ICT sector, by group of products. Year 2012

Data in millions of euros

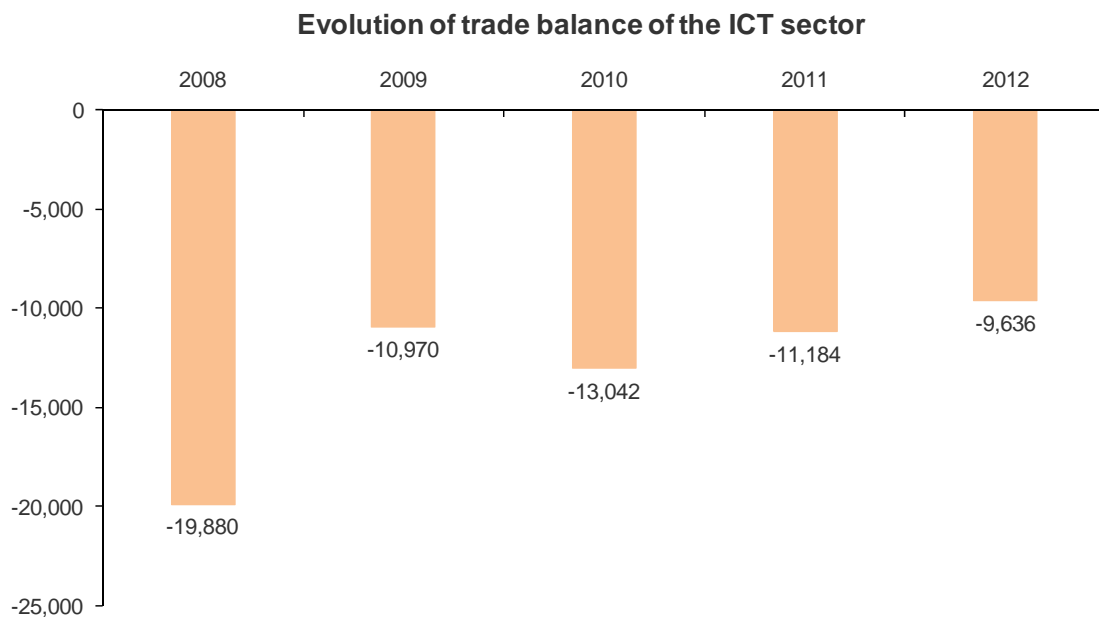
Group of products (CN ¹ 2010)	Exports	Imports	Commercial balance	Coverage rate	% Commercial balance. Variation as compared to 2011
1. Telecommunication equipments	1,300.7	4,806.3	-3,505.6	27.1	18.9
2. Computers equipment	634.3	3,417.3	-2,783.0	18.6	2.7
3. Electronic components	925.3	1,666.6	-741.4	55.5	13.8
4. Audio and video equipment	761.2	2,558.8	-1,797.6	29.7	17.2
5. Other ICT products	1,078.0	1,886.7	-808.7	57.1	16.7
TOTAL ICT SECTOR	4,699.5	14,335.7	-9,636.2	32.8	13.8
TOTAL	226,114.6	257,945.6	-31,831.0	87.7	33.6

Source: INE compilation with data

¹Combined Nomenclature

Evolution of foreign trade of the ICT sector (2008 – 2012)

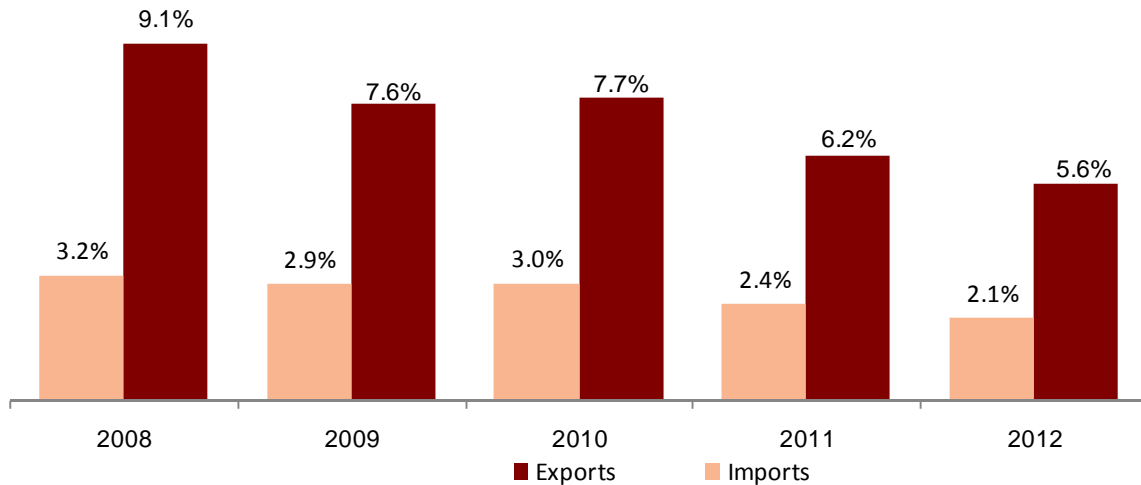
The trade balance of this sector varied throughout the whole series, although it was always negative. In 2012, it increased up to –9,636 million euros, from –11,184 million euros in 2011.



The annual variation rate of the trade balance in the ICT sector was 13.8% in 2011 and 14.2% in 2012.

Both imports and exports in the ICT sector slightly decreased as compared with the total imports and exports, standing at 5.6% and 2.1%, respectively.

% Exports and imports of the ICT sector on the total national exports and imports



The annual variation rates of imports and exports in 2012 were lower than those of 2011. Thus, the variation rate of exports in 2012 was -10.4% as compared with -5.3% in 2011, and that of imports was -12.7% this year as compared with -11.6% in the previous year.

Methodological annex

The so-called ICT Sector is comprised of the manufacturing and services industries whose main activity is linked to the development, production, commercialisation and intensive use of Information and Communications Technologies. The ICT Sector is characterised by high rates of innovation, technological progress and productivity.

In statistical terms, the definition of the ICT Sector is developed through a comprehensive listing of the branches of activity corresponding to ICT companies (**focus by sector**) and ICT products (**focus by product**).

In order to determine the list of activities and products in the ICT sector, we have begun with the methodological work carried out by the OECD on the subject.

Information sources

The statistical information on the ICT Sector has been obtained from the following INE statistical operations:

Industrial Companies Survey; Annual Services Survey; Statistics on R&D Activities; Technological Innovation in Companies Survey; Quarterly Labour Cost Survey; Industrial Products Survey and Survey on the Use of Information and Communications Technologies and Electronic Commerce in Companies.

Information has also been obtained from the Foreign Trade Statistics of the State Tax Administration Agency.

List of branches of the ICT sector according to CNAE 2009

ICT manufacturing industries

CNAE 2611	Manufacture of electronic components
CNAE 2612	Manufacture of assembled printed circuits
CNAE 2620	Manufacture of computers and peripherals
CNAE 2630	Manufacture of telecommunications equipment
CNAE 2640	Manufacture of electronic products for consumption
CNAE 2680	Manufacture of magnetic and optical supports

ICT trade industries

CNAE 4651	Wholesale trade of computers, peripherals and computer programmes
CNAE 4652	Wholesale trade of electronic and telecommunications equipment and parts

ICT services industries

SOFTWARE PUBLISHING

CNAE 5821	Publishing of computer games
CNAE 5829	Other software publishing

TELECOMMUNICATIONS

CNAE 6110	Wired telecommunications activities
CNAE 6120	Wireless telecommunications activities
CNAE 6130	Satellite telecommunications activities
CNAE 6190	Other telecommunications activities

COMPUTER PROGRAMMING, CONSULTANCY AND OTHER ACTIVITIES RELATED TO IT

CNAE 6201	Computer programming activities
CNAE 6202	Computer consultancy activities
CNAE 6203	Computer facilities management activities
CNAE 6209	Other information technology and computer service activities

WEB PORTALS, DATA PROCESSING, HOSTING AND RELATED ACTIVITIES

CNAE 6311	Data processing, hosting and related activities
CNAE 6312	Web portals

REPAIR OF COMPUTERS AND COMMUNICATION EQUIPMENT

CNAE 9511	Repair of computers and peripheral equipment
CNAE 9512	Repair of communication equipment
