

22 July 2015

ICT Sector Indicators Year 2013

Main results

- Turnover for ICT sector companies decreases 3.6% in 2013 as compared with the previous year, reaching 80,229 million euros.
- In 2013, the number of companies in the ICT sector increases 2.1%, while the number of unemployed persons decreases by 3.3%.
- The added value of the companies in the ICT sector was 30,564.6 million euros in 2013, representing a 3.6% annual decrease.
- 38.7% of companies in the ICT sector carry out innovative activities during the year 2013, and 16.1% carry out R&D activities.
- The ICT sector obtained a negative trade balance of 9,608.1 million euros in 2013, indicating a decrease of 0.3%, as compared with that registered in the previous year.

Main variables in the ICT sector¹

Turnover for companies in the Information and Communication Technologies (ICT) sector stood at 80,229 million euros in the year 2013, that is, 3.6% less than the previous year. These companies generated an added value of 30,564.6 million euros, 3.6% less than in 2012.

The number of companies in the ICT sector stood at 49,863, that is, 2.1% more than in the previous year. In turn, the number of persons employed in the ICT sector stood at 390,638 persons, with a decrease of 3.3%.

Main variables in the ICT sector¹. Year 2013

Economic data in million euros

ICT sector (CNAE-2009)	2013	% annual variation
Number of companies	49,863	2.1
Turnover	80,229.0	-3.6
Added value	30,564.6	-3.6
Number of employed persons	390,638	-3.3

Source: Industrial Companies Survey and Annual Services Survey

¹ Since the reference year 2013, the Industrial Companies Survey extends its population and territorial scope, including industrial companies with no wage earners and companies in Ceuta and Melilla. In order to allow the comparison with the previous year, all annual variation rates were figured out over the comparable common scopes for 2012 and 2013.

Evolution of the number of companies and the number of persons employed in the ICT sector (2008 – 2013¹)

The number of companies increased in 2013 for the fourth year in a row. In turn, the personnel employed decreased after three years of increases.

Evolution of the number of companies and the number of employed persons in the ICT sector (2008-2013¹)

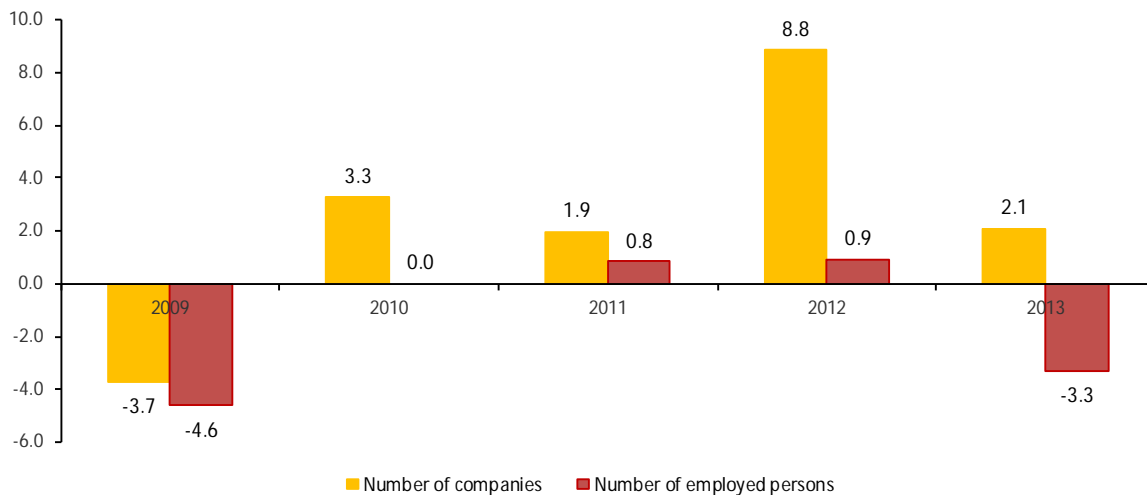
	2008	2009	2010	2011	2012	2013
Number of companies	43,708	42,078	43,451	44,298	48,218	49,863
Number of employed persons	415,605	396,395	396,543	399,783	403,422	390,638

Source: Industrial Companies Survey and Annual Services Survey

In 2013, the annual variation rate¹ of the number of companies in the ICT sector was 2.1%, as compared with 8.8% in the previous year.

In turn, the annual variation rate¹ of the number of personnel employed was -3.3%. In 2012, it was 0.9%.

Annual variation rate of the number of companies and employed persons in the ICT sector (2009-2013¹)



Internal R&D expenditure of ICT sector companies

Companies in the ICT sector invested a total of 995.1 million euros on R&D in 2013. This figure accounted for 14.4% 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 618 million euros.

Current expenses accounted for 95.7% of the total expenditure on R&D by companies in the ICT sector. In turn, capital expenses represented the remaining 4.3%.

Internal R&D expenditure in the ICT sector. Year 2013

Data in million euros

ICT sector (CNAE 2009)	Current expenses		Capital expenses		TOTAL
		%		%	
1. Manufacturing	102.7	94.6	5.9	5.4	108.6
2. Services	849.8	95.9	36.7	4.1	886.5
a. ICT trade industries	62.0	98.1	1.2	1.9	63.2
b. ICT services industries	787.8	95.7	35.5	4.3	823.3
- Software publishing	15.5	95.7	0.7	4.3	16.2
- Telecommunications	136.6	91.3	13.0	8.7	149.6
- Computer programming, consultancy and other activities related to IT	597.8	96.7	20.1	3.3	618.0
- Web portals, data processing, hosting	33.7	95.3	1.7	4.7	35.4
- Repair of computers and communication equipment	4.2	99.9	0.0	0.1	4.2
TOTAL TIC sector	952.6	95.7	42.5	4.3	995.1
TOTAL business sectors	6,357.1	92.0	549.3	8.0	6,906.4

Source: Statistics on Scientific Research and Technological Development Activities.

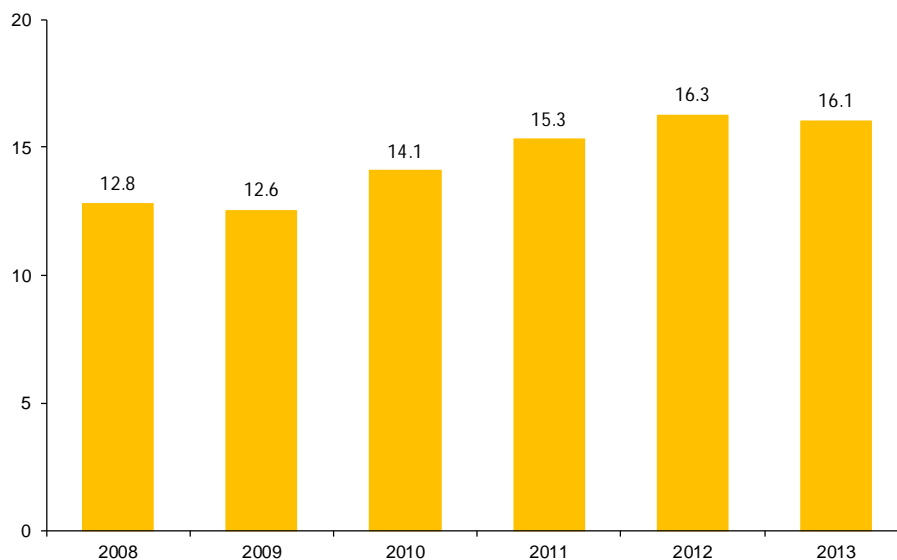
Evolution of the ICT sectors companies that carry out R&D activities. Year 2013

	2008	2009	2010	2011	2012	2013
Total ICT sector	1,929	1,709	1,618	1,714	1,828	1,707
Total business sector	15,049	13,603	11,481	11,178	11,213	10,627

Source: Statistics on Scientific Research and Technological Development Activities.

The percentage of companies in the ICT sector that carry out R&D activities reached 16.1% in 2013. This figure is lower than that registered the previous year (16.3%).

% Companies of the ICT sector that carry out R&D activities out of the total number of companies that carry out R&D activities



The annual variation rate of the number of companies in the ICT sector carrying out R&D activities decreased by 6.6% as compared to the previous year.

Personnel employed in the ICT sector

In 2013, the ICT sector concentrated 19.1% of the total personnel dedicated to R&D tasks in the business sector, and 17.8% 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 16,928.7. Women accounted for 23.7% of them.

In turn, there were 7,959.7 researchers dedicated to R&D, 22.8% 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 11,322.2 on FTE. Of this figure, 5,273.2 were researchers.

R&D Personnel (in FTE). Year 2013

ICT sector (CNAE 2009)	Total Personnel			Researchers		
	Women	%	TOTAL	Women	%	TOTAL
1. Manufacturing	302.5	16.3	1,859.0	177.6	16.9	1,051.1
2. Services	3,708.9	24.6	15,069.7	1,634.3	23.7	6,908.6
a. ICT trade industries	166.4	22.7	732.5	114.0	21.4	533.5
b. ICT services industries	3,542.5	24.7	14,337.2	1,520.4	23.8	6,375.0
- Software publishing	68.0	17.4	389.9	23.6	13.7	172.5
- Telecommunications	486.6	26.8	1,814.5	162.1	25.9	626.0
- Computer programming, consultancy and other activities related to IT	2,734.8	24.2	11,322.2	1,260.1	23.9	5,273.2
- Web portals, data processing, hosting	228.2	32.9	693.2	65.3	25.7	253.8
- Repair of computer and communication equipment	24.9	21.2	117.4	9.3	18.9	49.5
TOTAL ICT sector	4,011.4	23.7	16,928.7	1,811.9	22.8	7,959.7
TOTAL business sectors	27,767.3	31.3	88,635.1	13,922.4	31.1	44,713.8

Source: Statistics on Scientific Research and Technological Development Activities.

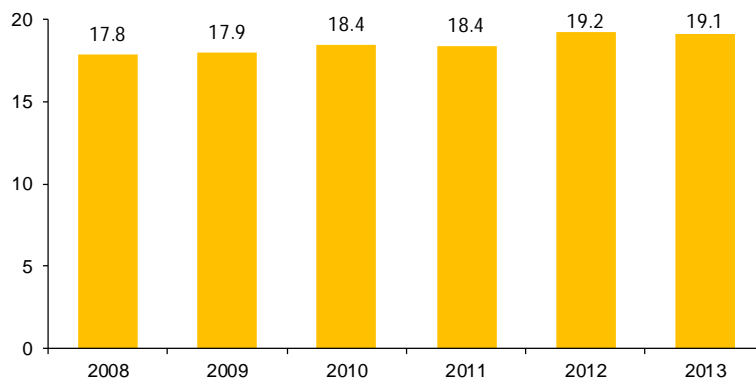
Evolution of the personnel in the ICT sector (in FTE) dedicated to R&D (2008-2013)

	2008	2009	2010	2011	2012	2013
Total ICT sector	16,976.3	16,814.7	16,984.5	16,489.5	17,167.6	16,928.7
Total business sector	95,207.4	93,698.8	92,221.3	89,841.1	89,364.3	88,635.1

Source: Statistics on Scientific Research and Technological Development Activities.

With regards to the total personnel employed, the personnel employed in the ICT sector dedicated to R&D tasks stood at 19.1% in 2013, as compared to the 19.2% of the previous year.

% of the personnel in the ICT sector dedicated to R&D out of the total personnel dedicated to R&D



In turn, the annual variation rate of the personnel in the sector decreased by 1.4% in 2013, after having increased 4.1% in 2012.

Companies carrying out innovative activities

During the year 2013, 38.7% of the companies in the ICT sector carried out innovative activities. By sector, 54.1% of manufacturing companies and 37.6% of companies in the services sector carried out innovative activities.

Within the ICT Sector, expenditure by ICT manufacturing industries on innovative activities stood at 141.8 million euros, whereas ICT services companies spent 1,760.4 million euros.

ICT sector expenditure accounted for 14.4% of total business expenditure on innovative activities.

Innovative activities in the ICT sector. Year 2013

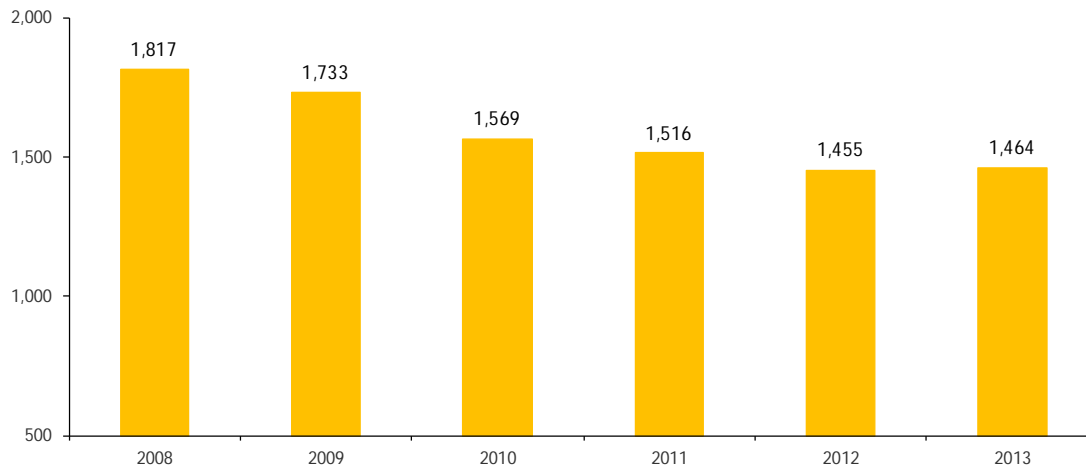
Data in million euros

ICT sector (CNAE 2009)	% of companies with innovative activities	Expenditure on innovative activities	% Expenditure over the total
Manufacturing	54.1	141.8	7.5
Services	37.6	1,760.4	92.5
Total ICT sector	38.7	1,902.1	100.0
Total business sector	11.0	13,233.3	

Source: Survey on Innovation in Companies

In 2013, the annual variation rate of the companies in the ICT sector that carried out innovative activities was 0.6% higher than that of 2012 (-4.0%). This meant the end of the downward trend of the last years.

Evolution of the number of ICT sector tha carried out innovative activities



Production value of goods in the ICT sector

According to the Industrial Products Survey, the production value of ICT goods decreased 10.4%, as compared to the previous year, reaching 2,531.2 million euros.

By group, all groups decreased in 2013. *Audio and video equipment* (-45.3%) and *Computer equipment* registered the greatest decreases (-11.4%).

Production value of ICT goods. Year 2013

Data in million euros

Groups of products (PRODCOM 2010)	Production value	% over the ICT sector total	% over the industry sector total	% Variation as compared to 2012
1. Telecommunication equipments	403.7	15.9	0.1	-3.5
2. Computer equipment	108.9	4.3	0.0	-11.4
3. Electronic components	811.8	32.1	0.2	-7.1
4. Audio and video equipment	158.4	6.3	0.0	-45.3
5. Other ICT products	1,048.3	41.4	0.3	-6.5
TOTAL ICT sector	2,531.2	100.0	0.7	-10.4
TOTAL	369,629.5		100.0	-2.2

Source: Industrial Products Survey

Evolution of the production value of ICT goods TIC (2008-2013)

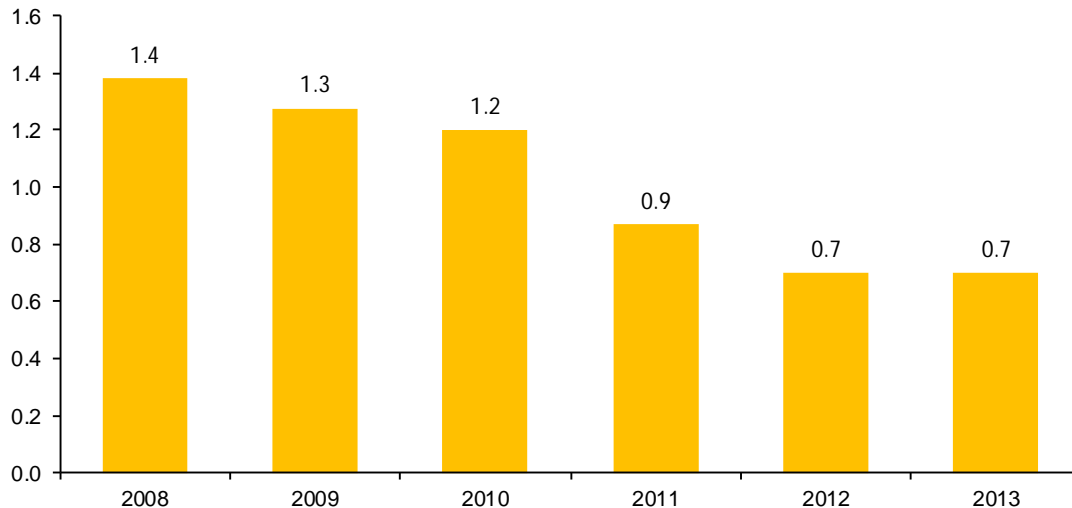
Million euros

	2008	2009	2010	2011	2012	2013
Total ICT sector	5,948.4	4,283.6	4,319.7	3,324.3	2,825.5	2,531.2
Total producción industrial	431,191.1	335,854.4	359,807.1	382,380.8	377,949.1	369,629.5

Source: Industrial Products Survey

Regarding the total value of the industrial production, the production value of ICT goods in 2013 stood at 0.7%, the same percentage as the previous year.

Production value of the ICT goods on the total value of the industrial production. Percentage



The variation rate of the production of goods in the ICT sector in 2013 decreased by 10.4% as compared to the year 2012.

Foreign trade of ICT products

The trade balance of ICT products in 2013 registered a negative balance of 9,608.1 million euros. This trade deficit for the sector was 0.3% lower, as compared with the previous year.

Exports reached a total of 4,344.8 million euros, whilst imports reached 13,953 million euros.

Amongst the groups of products of the ICT sector, worth noting were the exports of *Telecommunications equipment*, which represented 26.5% of the total for the ICT sector exports and 36.3% of the total imports.

Foreign trade of the ICT sector, by group of products. Year 2013

Data in million euros

Groups of products (CN ¹ 2010)	Exports	Imports	Commercial balance	Coverage rate	% Commercial balance. Variation as compared to 2012
1. Telecommunication equipments	1,152.4	5,066.6	-3,914.2	22.7	-11.7
2. Computer equipment	676.4	3,395.1	-2,718.7	19.9	2.3
3. Electronic components	805.3	1,314.5	-509.3	61.3	31.3
4. Audio and video equipment	564.6	2,232.2	-1,667.6	25.3	7.2
5. Other ICT products	1,146.2	1,944.5	-798.3	58.9	1.3
TOTAL ICT sector	4,344.8	13,953.0	-9,608.1	31.1	0.3
TOTAL	235,814.1	252,346.8	-16,532.7	93.4	48.1

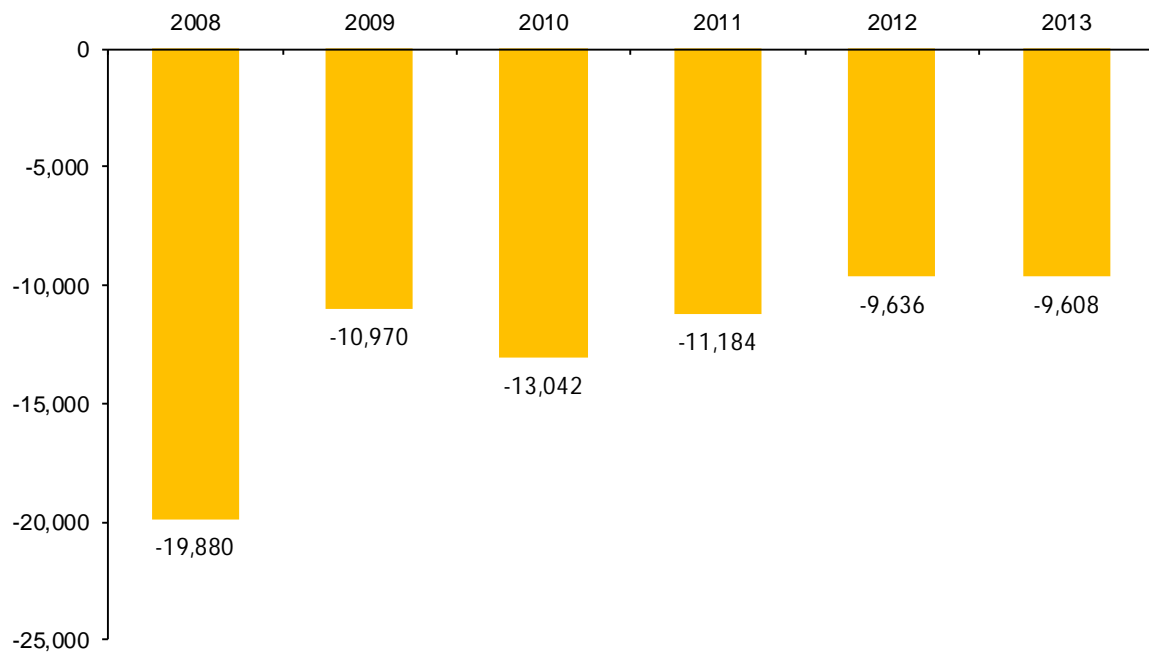
Source: INE compilation with data from the State Tax Administration Agency

(¹) Combined Nomenclature

The trade balance of this sector remained negative during the last years. In 2013, it increased reaching –9,608 million euros, from –9,636 million in 2012.

The annual variation rate of the trade balance in the ICT sector was 0.3% in 2013 as compared to in 2012.

Evolution of the trade balance of ICT sector. Million euros



Evolution of exports in the ICT sector

	2008	2009	2010	2011	2012	2013
Total ICT sector	5,996.3	4,716.2	5,538.9	5,244.5	4,699.5	4,344.8
Total foreign trade of ICT goods	189,227.9	159,889.6	186,780.1	215,230.4	226,114.6	235,814.1

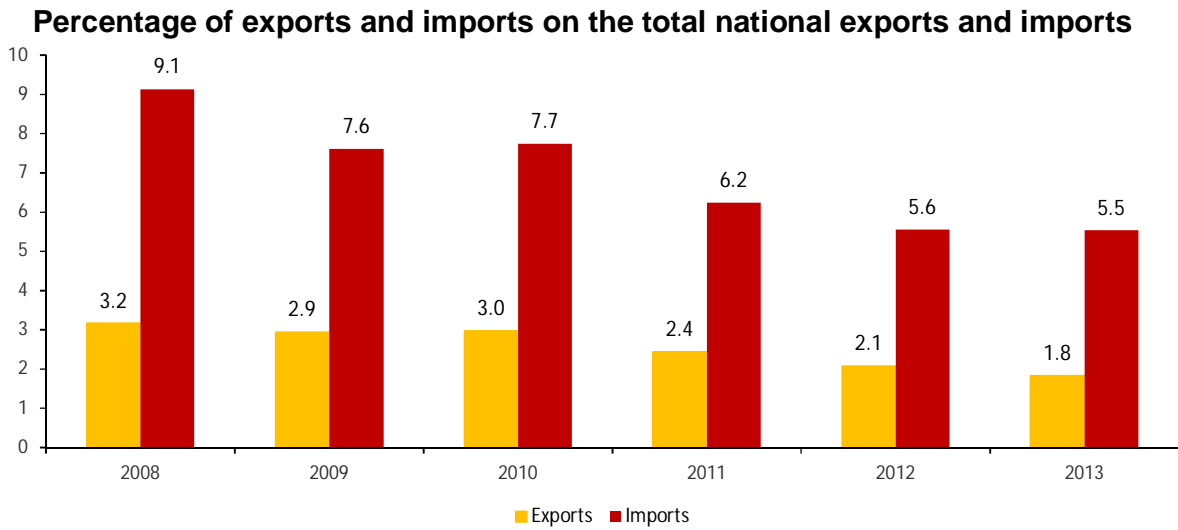
Source: INE compilation with data from the State Tax Administration Agency

Evolution of imports in the ICT sector

	2008	2009	2010	2011	2012	2013
Total ICT sector	25,875.8	15,686.7	18,580.7	16,428.7	14,335.7	13,953.0
Total foreign trade of ICT goods	283,387.8	206,116.2	240,055.9	263,140.7	257,945.6	252,346.8

Source: INE compilation with data from the State Tax Administration Agency

Both imports and exports in the ICT sector slightly recorded a light decrease in 2013 as compared with the total imports and exports, standing at 5.5% and 1.8%, respectively.



Exports and imports decreased to a lesser extent than in 2012. Thus, the annual variation rate of exports stood at -7.5% , as compared to -10.4% in 2012. In turn, imports stood at -2.7% , as compared to -12.7% 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