

ECONOMY

BUSINESS AREA 10



ICT (Information Communication Technology)



At a European level, the ICT sector of Spain is the fifth most important in terms of revenue: **€88.13** billion in 2016, with a GDP contribution nearing **6%** and an R&D investment volume almost doubling the numbers of the 2003-2009 period. In 2016, the 30,000 ICT companies operating in Spain employed 420,905 people. Direct and indirect employment in ICT was 1.2 million in 2016. Furthermore, our country is a leader in advanced technologies. For example, **3 out of every 5 flights worldwide use Spanish software to land and 13 out of every 15 key North American gas and oil companies use Spanish information management and control systems.**

With regards to the Region of Murcia, the ICT sector is known for its significant growth potential and availability of state-of-the-art technological infrastructures, such as the Fuente Álamo Technology Park, the Murcia Scientific Park and the Data Center of **Kio Networks**, a Mexican multinational corporation operating in the region since 2014. Within the ICT sector, companies operating in the region specialize mainly in the design and development of IT systems, telecommunications, electronics and audiovisuals, customized software, ICT consultancy, generic hardware and software, web development and graphic arts. Additionally, over **90%** of regional ICT firms are experts in service development. One of the differentiating features of the Murcian ICT sector is its workforce, comprised of highly qualified

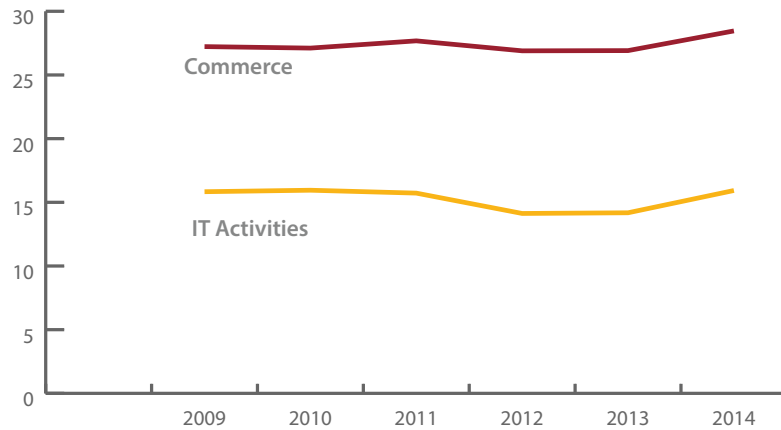
professionals who are available to work anywhere in the Region, Spain and the rest of Europe.

Regarding the exports of technological SMEs from Murcia, they increased **26%** in 2016 mainly due to an sales increase of hardware (62.93%) and telecommunications equipment (22.17%). This increase is ten percentage points higher than in the rest of Spain. The main destinations for the products and services of Murcian technological firms were **Portugal, Morocco, Chile and China-Hong Kong.**

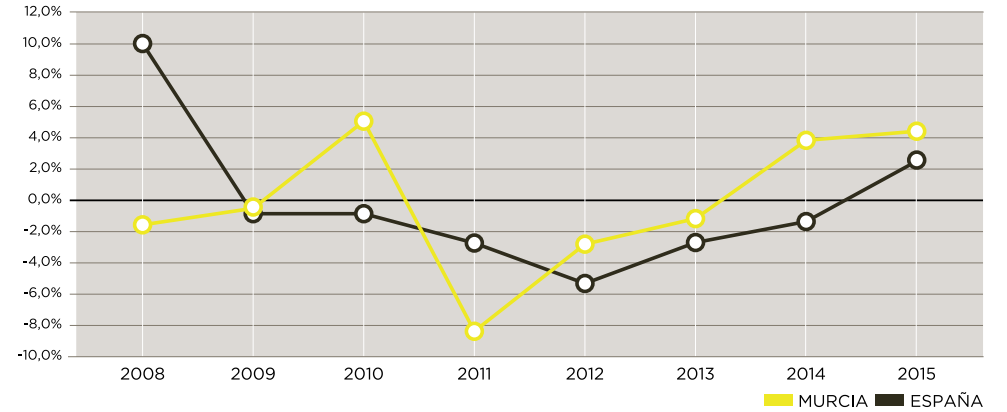
Murcia Region firms in this sector are highly dynamic and very innovative and entrepreneurial. These features, in addition to favoring the development of the fourth industrial revolution, facilitate the integration of this type of technologies in industrial production and distribution processes which, in turn, will contribute to increase the competitiveness of the region's industrial and business structure. Nowadays the regional ICT sector, which is highly focused on increasing its presence in Latin American markets, have managed to increase the standards of technology and service quality in Murcia TIC regional, partly due to the arrival of important **multinational corporations.** These multinational corporations have set up in Murcia because of our **local, dynamic regional sector, as well as due to the availability of highly qualified professionals, excellent connectivity of the region and competitive costs.**

ICT sector business volume for commerce and IT activities (Millions of euros)

(Source: ONTSI)

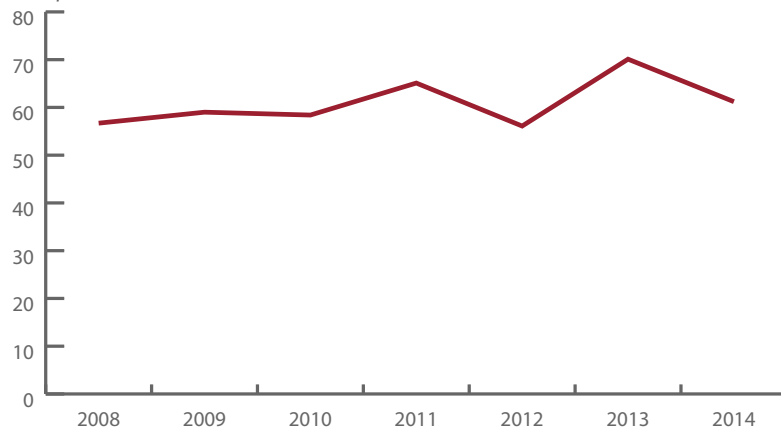


EVOLUTION OF R&D EXPENDITURE GROWTH RATES



% of E-commerce evolution amongst companies in ICT sector

(Source: Spain's National Institute of Statistics)



COMPANY HIGHLIGHTS:

Multinational corporations leading the ICT sector in Murcia include:

KIO Networks (Mexico)
Capgemini (France) and
NTT Data (Japan), which bought out Everis.

50,000 companies in different production and commercial sectors of the Murcian business structure; over 20,000 companies in other Spanish regions are supplied with Murcian ICT services, employing nearly 3,800 qualified technicians.