

BUSINESS AREA 10



ICT (Information Communication Technology)

Within Europe, the ICT sector of Spain ranks fifth in terms of revenue, with a GDP contribution increase of 7.3% and an R&D investment volume which has doubled over the last ten years. The number of ICT companies in Spain has also increased 50% over the last decade, and is currently 60,000, employing 565 people (40% increase in only two years). Direct and indirect employment in ICT amounted to over 1.5 million in 2021. 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 and the Murcia Scientific Park. Companies operating in region's ICT industry specialize mainly in the design and development of IT systems, telecommunications, electronics and audiovisuals, customized software, ICT consultancy, generic hardware and software, web

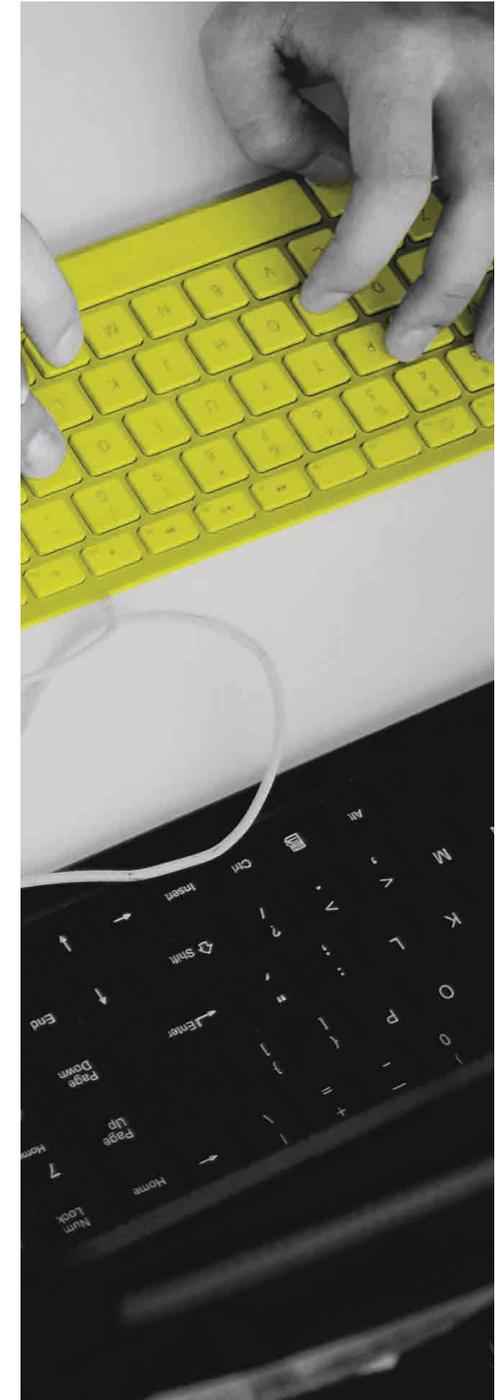
development and graphic arts.

A distinctive feature 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.

A positive aspect of the recent worldwide pandemic is the fact that this industry has simply boomed. Employment has increased nearly 15% in a year, turnover is now 20% higher and the sector does not stop growing. This has a translation in the sale of Spanish IT products internationally, with the main markets being 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 industry, which is highly focused on increasing its presence in Latin American markets, has managed to optimize technology standards and service quality. This is partly due to the arrival of important multinational corporations which have set up in Murcia because of our competitiveness, availability of highly qualified professionals, excellent connectivity and cost of living.



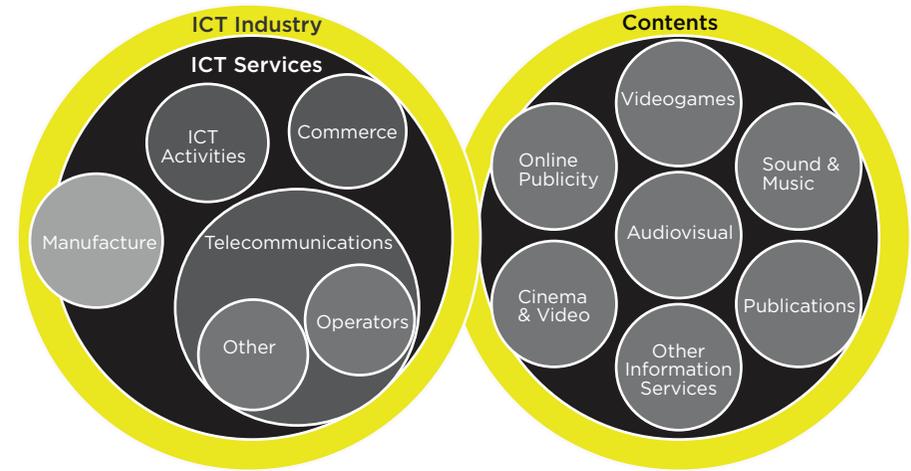
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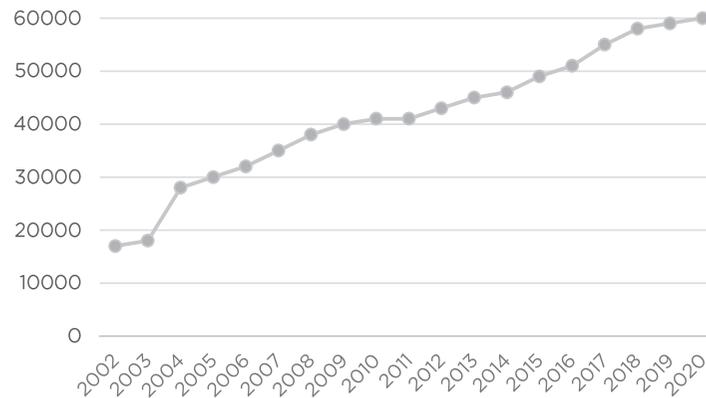
Additionally, over 90% of regional ICT firms are experts in service development.

Main ICT Industry Data



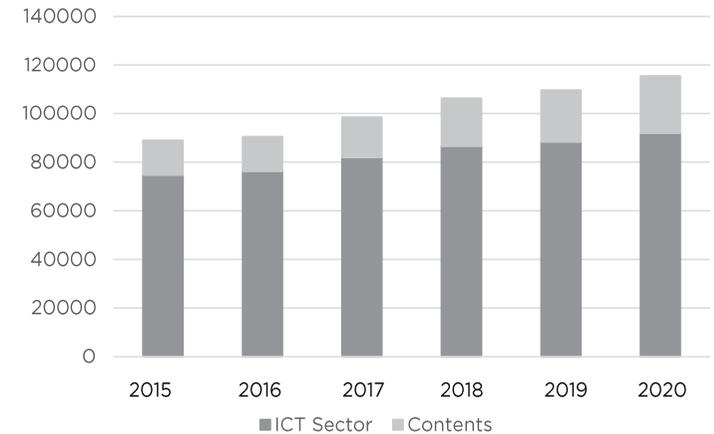
Source: Spain's Ministry of Economy and Business

Evolution in the Number of Companies



Source: Spain's Statistical Agency

Business Volume Increment



Source: Nation Master

INDUSTRY HIGHLIGHTS

Some of the main players operating in this Murcian industry are **KIO Networks**, a Mexican multinational corporation operating since 2014 in the region where they have built a cutting-edge Data Center, **Capgemini** (France), a global leader in consulting, digital transformation, technology and engineering services, as well as **NTT Data** (Japan), which bought out the renowned consultancy firm **Everis**.

In recent years, **Elluc Projects**, Australian company specializing in digital engineering, set up in Murcia to provide their advanced solutions to a new array of European clients. The latest ICT company which decided to establish itself in our region is **SQA Consulting**, a UK company wishing to expand into Southern Europe from their new office in Murcia.

Nearly 80,000 companies operating in all types of production and commercial industries in Spain are supplied with Murcian ICT services, employing nearly 3,800 qualified technicians.