

Spain ICT - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Spain ICT Market was valued at USD 53.2 billion in the previous year, and it is expected to reach USD 82.6 billion by the next five years, registering a CAGR of 7.46 % during the forecast period. ICT is one of Spain's fastest-growing industries over the past ten years. Digitalization is critical to changing the Country's production model and accelerating its post-pandemic economic recovery.

Key Highlights

- Spain's ICT industry rebounded fast from the recent global health crisis and benefited from the push for digital transformation made possible by EU recovery funds. Spain is one of the largest economies in the EU, and the private sector continues to provide promising potential for sector-specific solutions. American businesses are acknowledged as essential suppliers of advanced goods and services.
- The advancement of Spain's backbone fiber networks and mobile networks' equipment upgrades would be influenced by the Country's 5G National Plan. Spanish Telecoms is expanding its company by utilizing its extensive client base to offer insurance, alarms, mobile sales, and energy. Notably, the Spanish government established the Digital Strategy 2025 in 2020, intending to promote the Country's digital transformation through, among other things, increased cybersecurity, digital public administrations, and the adoption of artificial intelligence technology.
- Spain's information technology (IT) industry has undergone tremendous expansion. Still, more trained, experienced IT personnel are needed to satisfy the expanding demand, particularly in the larger cities, which account for most of Spain's IT market.
- The rapid advancement of technology and the evolving nature of ICT industries require a skilled workforce to meet the demand of digital transformation. Access to quality ICT training programs and resources may be limited. This can result in a shortage of qualified professionals in specific ICT domains, hindering the overall growth and competitiveness of the ICT market in Spain.
- The COVID-19 pandemic significantly impacted the Spanish national economy. Large portions of the population have been forced

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to spend almost constantly at home because of the pandemic, raising the need for remote work, telemedicine, online education, and streaming in-home entertainment. Business hours and bandwidth usage increased as the Country adjusted to life with COVID-19. Digital networks aided in the resistance and ultimately led to sustained growth. Post-pandemic, the market is proliferating with the increased digitization activities in the Country.

Spain ICT Market Trends

Telecommunication Services Type is Expected to Hold Significant Market Share

- Mobile telephone services are widely used in Spain, with a large portion of the population relying on mobile phones for communication. Multiple mobile network operators offer voice and data services through various mobile plans, including prepaid and postpaid options. These services provide voice calls, text messaging, mobile internet access, and additional features like roaming and international calling.
- As IoT applications and devices grow, telecommunication providers offer IoT connectivity services. These services allow devices to connect to the internet, enabling data transfer and communication between devices. IoT connectivity is crucial for various sectors, such as smart cities, agriculture, healthcare, and industrial automation.
- The 5G networks in the 3.5GHz band support massive IoT connectivity. With the ability to connect many devices simultaneously, 5G facilitates deploying various IoT applications and services. This includes smart city infrastructure, industrial automation, connected vehicles, and other IoT-enabled solutions.
- According to Ericsson, the Spanish 3.5GHz (5G) network is expected to deploy fully this year. The 3.5GHz network will cover 53 percent of the Spanish population.
- Telecommunication providers in Spain offer data services catering to businesses' and organizations' needs. These services include dedicated leased lines, virtual private networks (VPNs), and cloud connectivity solutions. They provide reliable and secure data transmission for businesses with high demands for bandwidth and connectivity.

Retail and E-commerce Industry Vertical is Expected to Hold Significant Market Share

- The retail and e-commerce end-user industry in Spain's ICT market continues to evolve with advancements in technology and changing consumer behaviors. Businesses in this sector strive to enhance the online shopping experience, increase operational efficiency, and stay competitive in the rapidly growing e-commerce landscape.
- Spain has witnessed the emergence of various e-commerce platforms that provide businesses with the necessary infrastructure to set up and operate online stores.
- Mobile devices play a crucial role in retail and e-commerce, with many consumers using smartphones and tablets for online shopping. This has led to the development of mobile commerce applications and responsive website designs to enhance the mobile shopping experience.
- As the number of daily internet users in Spain grows, it expands the potential customer base for online retailers and e-commerce businesses. A large audience with internet access means a broader market for products and services, driving the demand for online shopping platforms.
- According to the EU, the use of Information and Communication Technologies (ICT) in households and by individuals is an annual survey conducted since 2002 aiming at collecting and disseminating harmonized and comparable information on the use of ICT in households and by individuals, the share of daily internet users reached its highest value 87.11 percent in 2022.
- With the increasing volume of online transactions, ensuring the security of customer data and protecting against cyber threats is paramount. ICT solutions for cybersecurity, such as encryption, security payment gateways, firewalls, and intrusion detection

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systems, help safeguard e-commerce platforms and customer information.

Spain ICT Industry Overview

The Spain ICT market is at a fragmented stage as the market currently consists of many players. Several key players in the ICT market are in constant efforts to bring advancements. A few prominent companies are entering into collaborations and expanding their footprints in developing regions to consolidate their positions in the market. The major players are SAP SE, Oracle, Microsoft Corporation, Accenture, and Hewlett Packard Enterprise (HPE), among others.

Indra Sistemas, S.A., Spain, formed a strategic alliance with Centum Electronics Limited, India, in October 2022 to work solely on advanced radar systems and technology for the Indian government. The fabrication and installation of the radar for use in space applications are contemplated under the MoU. Long-range radar is designed to find, follow, and analyze space objects and debris hundreds of km away.

Oracle unveiled the creation of the first Oracle Cloud Infrastructure (OCI) region in Spain in September 2022 to address the country's quickly expanding demand for business cloud services. With the opening of the new area in Madrid, Oracle's public and private sector clients and partners in Spain would have access to various cloud services that may help them update their applications, experiment with data and analytics, and move mission-critical workloads from their data centers to OCI.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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