

# 2012

Consulting in Spain  
The industry in figures 2012



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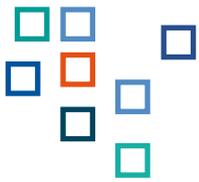
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# Introduction



**Manuel Pimentel**

Chairman of the Spanish Association of Consulting Firms (AEC)

**The consulting industry in Spain –key figures for which are published in this latest AEC report–** has not managed to escape the effects of the country's economic downturn, and the sector's sales on the Spanish market fell by 1.7% in 2012. Nonetheless, the report also contains some cause for cautious optimism for the future of the business.

Rather than resigning themselves to a situation in which demand for consulting services has remained unchanged since 2008, Spanish firms are learning how to make the most of opportunities abroad. Growth in income from overseas business –up 63% since the start of the crisis and 33.4% in just the last year– is clear proof of the competitiveness of Spanish companies. In part, this is probably due to a reining-in of profit margins in the industry, reflected in a drop in turnover per employee. However, it is not possible in the consulting

business to compete solely on price; the success of Spanish companies is grounded on a well-earned reputation for experience, know-how, and technical competence.

Good results on foreign markets, therefore, are a cause for satisfaction for the industry and perhaps also proof that there is a model for the Spanish economy to escape the profound crisis it is currently suffering.

Above all, the success of Spanish firms is based on careful staff selection and intensive continuous training. Evidently, this model is more difficult to maintain during a recession, when prices and expenditure are being slashed. This year's AEC report shows that Spanish consulting firms have managed successfully to combine austerity and investment in human capital: they continue to be committed to educational intensity, as demonstrated by a 4.3%

increase in training hours per employee, despite a reduction in the training budget.

At the same time, consulting still represents one of the best opportunities for young Spanish graduates looking for rapid and solid career development. There is an increasing demand in Spanish society for quality jobs for young people, most of whom now hold one or more university degrees. The only way of capitalising on Spain's investment in higher education is by employing these people in sectors of high added value, thus translating human capital into growth and prosperity. Although employment at home by the Spanish consulting industry fell by 1.4% last year, elsewhere it grew by around 42%, to give a net increase of 6% to 136,069 employees worldwide.

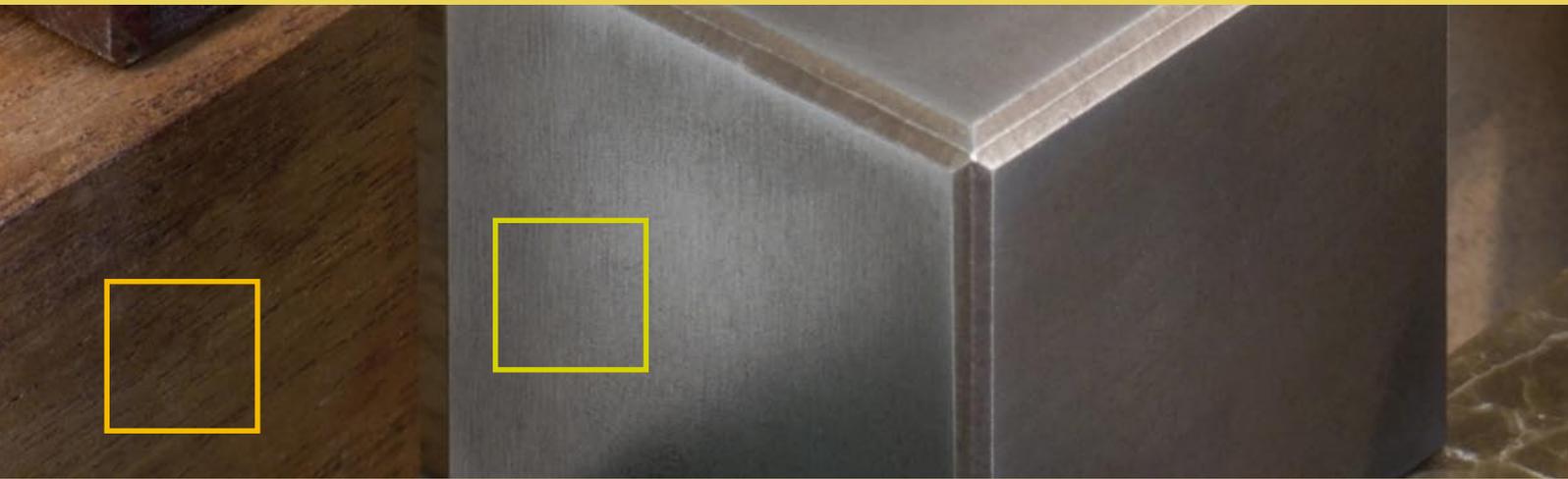
The 5.9% growth enjoyed by the industry in 2012 was largely due to good performance in the sale of

outsourcing services, now the chief source of income for Spanish consulting firms. The leading client sector continues to be the financial industry, which alongside the telecom industry is also one of the foundations of increased income. In the area of Spanish public authorities, however, the situation is very different: here, demand for consulting services has fallen by 15%. We are aware of the need for extensive spending cuts in the Spanish public sector; however, we also trust that the worst of is now over and that the authorities can now renew their policies of modernising services and improving efficiency in processes. In achieving these aims they will find in Spanish consulting firms their best allies and will be able to draw on our accumulated experience in Spain and the rest of the world.

We therefore have good reason to trust that policies of growth and collaboration can and must be developed with the public sector,

with the certainty that consulting has a key role to play in achieving the best solutions for our economy and our society. Consulting firms need to bring to bear all their commitment, their effort, their will for improvement, their accumulated talent and the added value they can offer; and they must do so as a consolidated, competitive and leading-edge industry. In the present context, we must continue working determinedly and consistently to ensure the competitiveness of our firms, the excellence of our staff and the quality of our products and services. In achieving this, we trust we will enjoy the backing everyone involved in the business.

I sincerely hope that, as in previous years, this report will provide reliable and useful information to everyone with an interest in the industry and I want to thank all those companies that have contributed selflessly to its publication.



# Consulting in Spain in 2012

## Executive summary

This report contains a detailed analysis of trends within the consulting industry during 2012. Like every year since 2004, it has been prepared using information taken from a survey of the leading companies in the industry.

It primarily analyses the earnings of consulting firms and their distribution and compares these figures to the equivalent ones for the previous year. The report also provides an estimate for earnings for 2013 based on the forecasts of the consulting firms themselves.

It also contains figures on the number of staff employed in the industry, investment in continuous training and other information.

The main conclusions of the report may be summarised as follows:

- Like the rest of the Spanish economy, the domestic consulting service market is currently experiencing a profound crisis. Turnover from consulting services has not grown since the outbreak of the global financial crisis in 2008.
- Against this backdrop, Spanish companies are seeking new sources of income on international markets, either by exporting their services, or by way of overseas subsidiaries. Overseas sales by Spanish firms rose by 33.4% last year.
- Trends in workforce numbers have mirrored those of earnings. For the first



## After four years of stagnation, for the first time, the domestic market has shrunk

time since records began, staff numbers in Spain fell (by 1.4%) in 2012. However, this drop was more than offset by a 42.1% increase in employees in overseas subsidiaries of Spanish companies.

- Despite the crisis, consulting firms continue to operate an HR strategy based on professional quality and intensive training. Expenditure on training fell slightly from €305 per employee in 2011 to €274 in 2012. However, this was due to a reduction in the costs of educational services, since the number of training hours per employee actually increased over the period.
- During 2012, outsourcing services became the main source of income for Spanish

consulting firms, consolidating a trend that has been continuous since 2004.

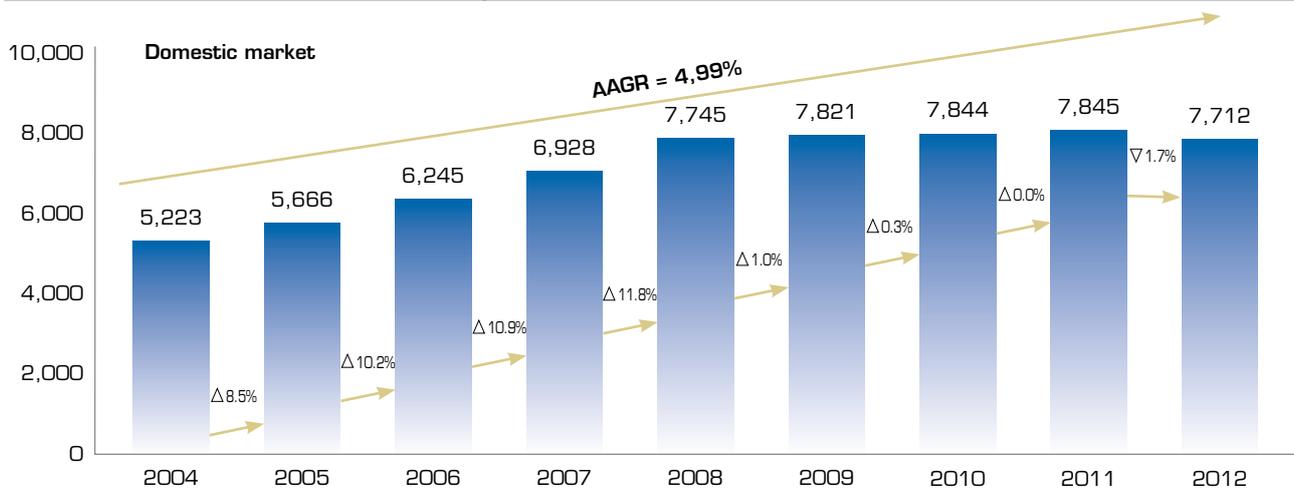
- The leading clients of Spanish consulting firms continue to be financial institutions, followed by telecom companies and government. Income from services to government authorities fell as a result of cutbacks in the public sector. However, this trend was offset by an increase in sales to governments in other countries.
- For 2013, the forecast is for an increase in sales of around 2%, including the domestic and international markets.

## Income of the consulting industry

Over recent years, the Spanish consulting industry has consolidated its process of internationalisation. The value generated by services provided on international markets has

increased steadily since 2004 and from 2010, systematically exceeding 20% of the industry's total earnings. In 2012, overseas sales –including both exports and sales by subsidiaries of Spanish companies– rose even further, to make up 27.1% of total turnover.

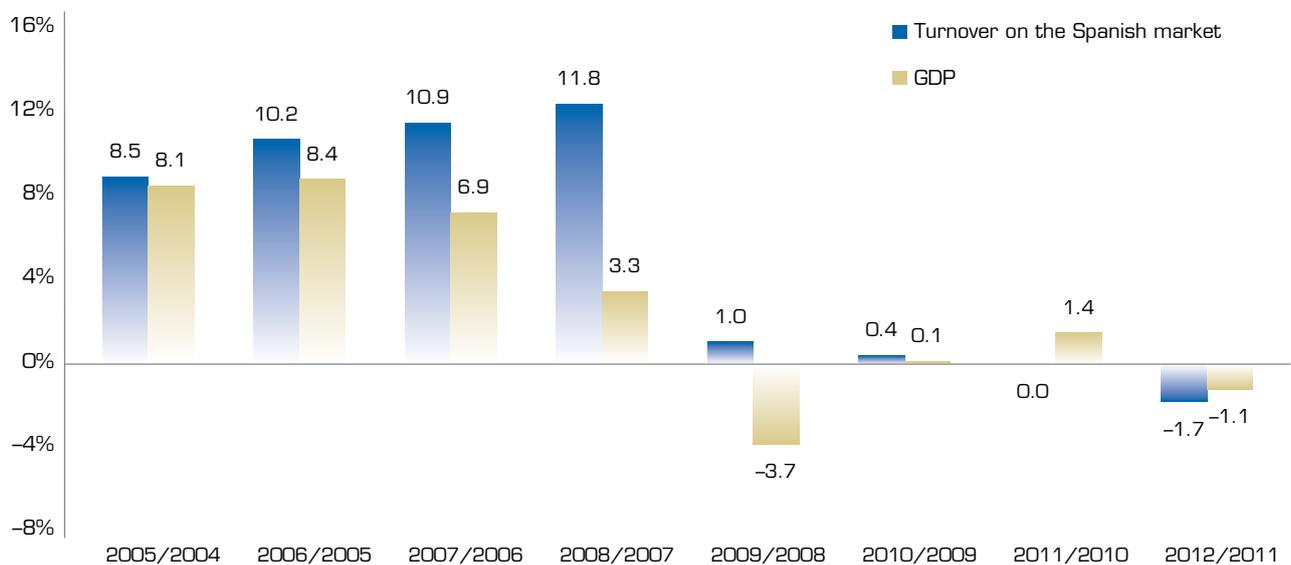
Table 1. **Income from sales on the Spanish market (€m)**



AAGR: accumulated annual growth rate.

Source: AEC.

Table 2. **Income of Spanish consulting firms on the domestic market and Spanish GDP (at current rates), 2004-2012 (annual growth rates)**



Sources: income from consulting services: AEC; GDP: INE, Contabilidad Nacional Trimestral de España, Base 2008.



In view of this internationalisation process, any analysis of trends in the industry needs to draw a distinction between two markets, domestic and international, which have seen very different performance in recent years. In Spain, income from consulting services stopped growing in 2008, coinciding with the start of the financial crisis. Up to that point, income from sales to Spanish companies and government agencies had risen strongly; since then, however, sales to domestic companies and to the different tiers of government in Spain have been sluggish (see Table 1).

In 2012, sales to this segment of the market came to €7,712 million, down 1.7%. This is in line with the overall trend of the Spanish economy, which contracted by 1.1% over the year (in nominal terms).

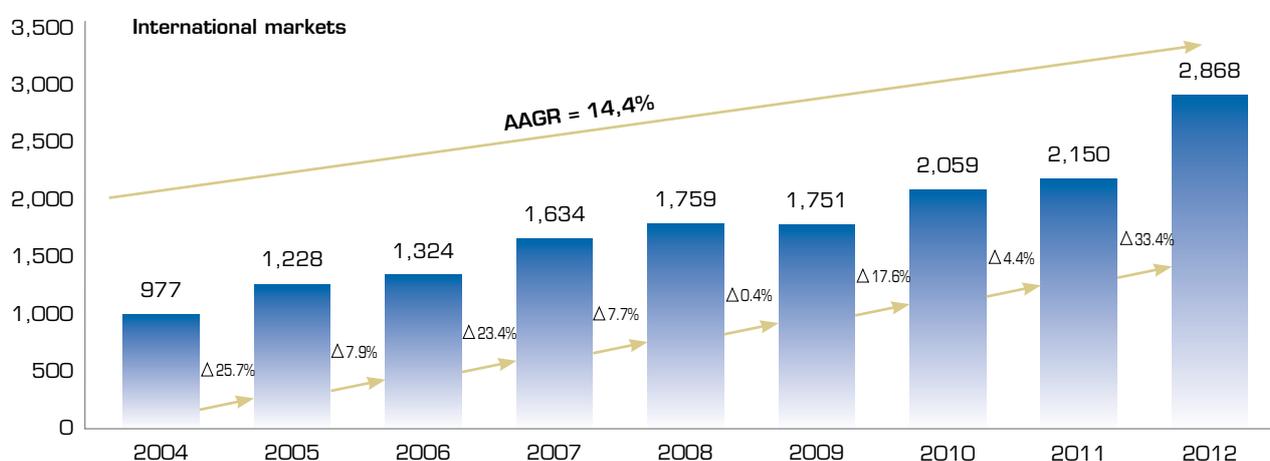
Performance on international markets was entirely different. In 2012, overseas sales by Spanish consulting firms came to €2,868 million. This represents a threefold increase since 2004, with an average annual growth rate of 14.4% (see Table 3).

**The overseas market continues to be the main source of growth for the consulting industry: in 2012, overseas sales of Spanish consulting firms came to €2,868 million, 27.1% of total income**

In the last year, earnings from overseas business were up 33.4%, as a result of both organic growth and corporate movements of a number of Spanish companies abroad.

In overall terms, Spanish consulting firms invoiced a total of €10,580 million from

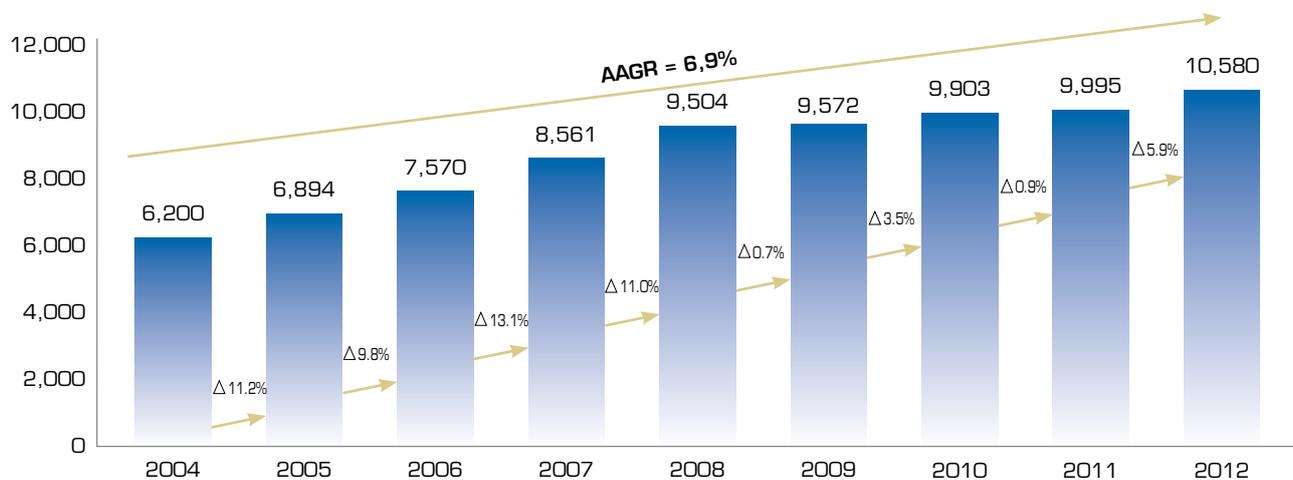
Table 3. **Income from sales on international markets (€m)**



AAGR: accumulated annual growth rate.

Source: AEC.

Table 4. Total income from sales of Spanish consulting firms and their subsidiaries abroad (€m)



AAGR: accumulated annual growth rate.

Source: AEC.

services in 2012, 5.9% up on the previous year (see Table 4). This result reflects good performance on international markets, where Spanish companies have drawn on their experience and demonstrated their competitiveness.

**For the first time, 2012 saw a net fall in jobs in the consulting industry in Spain: over recent years the industry has been capable of maintaining and creating employment, but the fall in demand on the domestic market is having a clear impact on its capacity to create employment**

## Employment in the consulting industry

As with sales, the figures for employees in Spanish consulting firms need to be broken down between establishments in Spain and overseas subsidiaries.

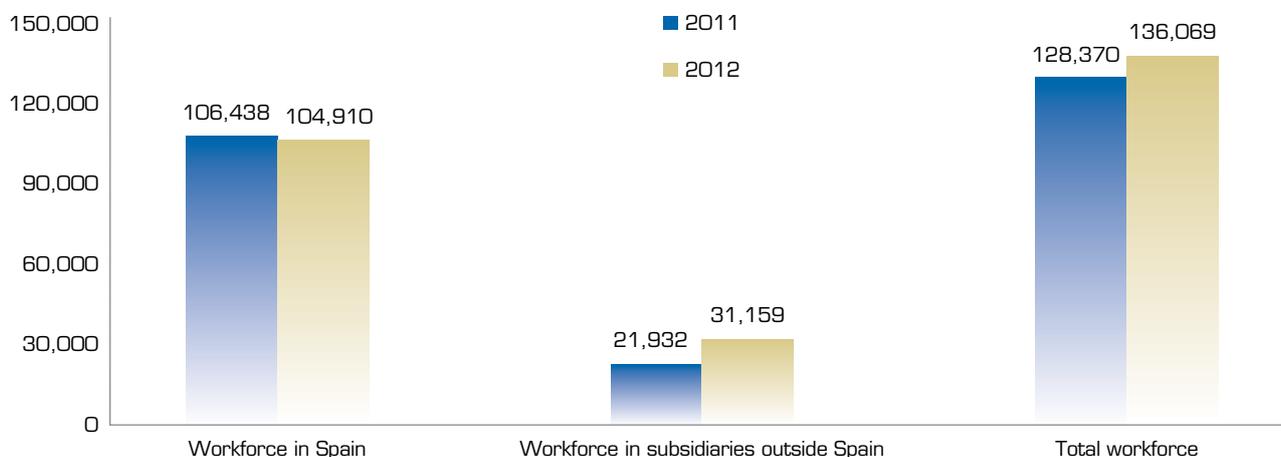
In Spain, the workforce fell by 1.4% in 2012, to 104,910 employees; although the change is a minor one, it is significant in being the first fall since comparative information became available in 2004.

In contrast, the number of employees in overseas subsidiaries increased by 42.1%, due both to organic growth and acquisitions of foreign companies, and the total figure now exceeds 31,000 employees. Altogether, the staff of Spanish consulting firms increased by 6% during 2012.

In any case, the data reflect an interest among consulting firms to maintain their staffing levels to as great an extent as possible, even in the current economic circumstances and despite a drop in sales on the Spanish market.



Table 5. **Staff of Spanish consulting firms in Spain and in their overseas subsidiaries**  
(number of employees)

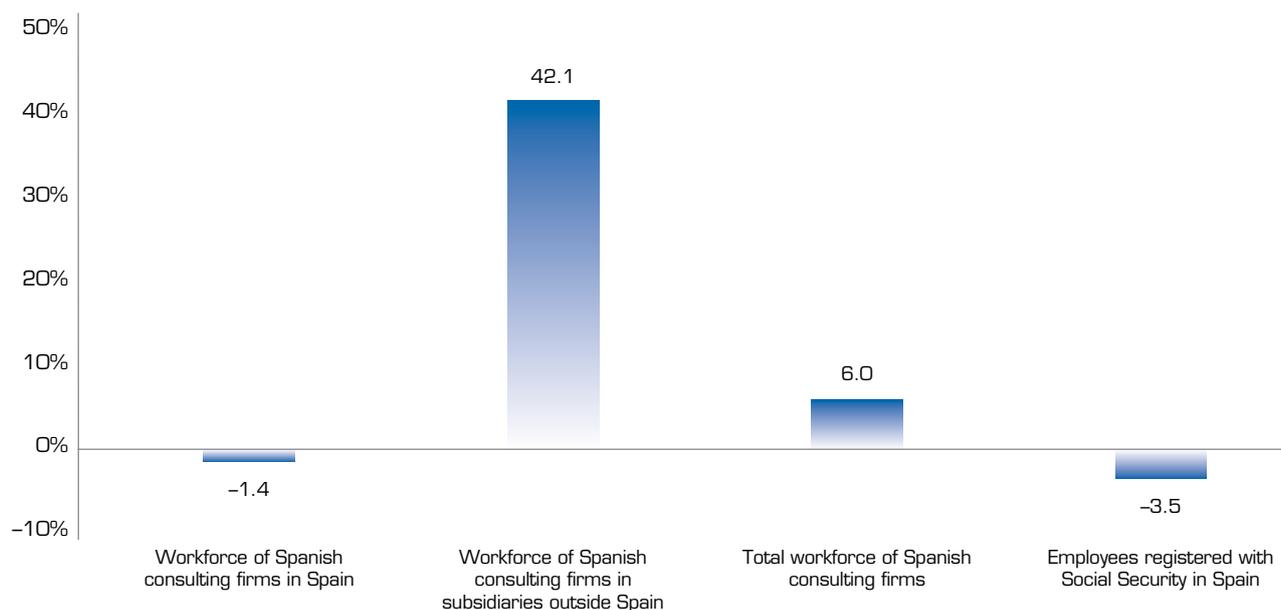


Source: AEC.

Trends in revenue and staff also impact productivity rates in the industry. Turnover-per-employee rates have fallen as a result of the economic downturn. While this

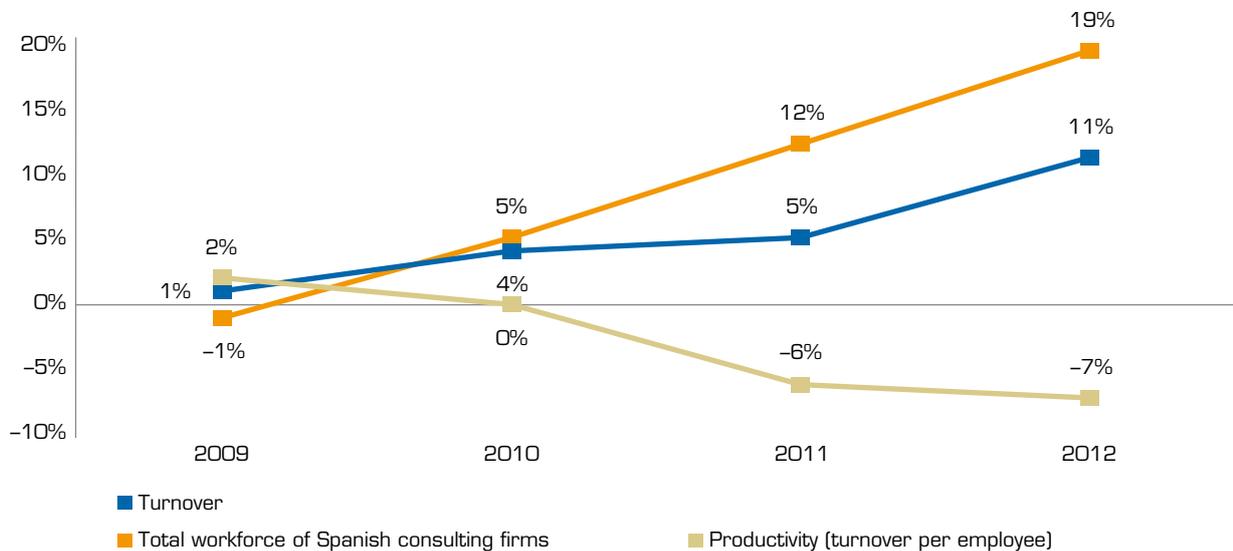
erosion in productivity rates has not been very significant, it highlights the effort that consulting firms have had to make to contain prices, which has also affected their margins.

Table 6. **Rates of variation (2012/2011) in workforce of Spanish consulting firms and Social Security contributors (employees) in Spain**



Sources: workforce of Spanish consulting firms: AEC; Social Security contributors (employees) in Spain: Anuario del Ministerio de Trabajo y Seguridad Social.

Table 7. **Percentage variation in turnover, workforce and productivity (turnover per employee) in the consulting industry as compared to 2008 figures**



Source: AEC.

## Human resources in the Spanish consulting industry

As mentioned in the previous section, the consulting industry has striven to maintain employment rates despite the severe economic downturn and a fall in earnings from

sales of services. To understand this type of policy, one needs to remember that the companies working in the sector create value thanks to the qualifications, experience, knowledge and initiative of their employees. The success and strategy of the consulting firms depends on their capacity to attract and maintain a base of human resources – their most important asset and the principal source of their competitiveness.

This is why even at a time of economic crisis, they have resisted cutting staff levels, trying to retain professionals with accumulated expertise and knowledge. It also explains why they continue to invest in training to augment the value of their resources, despite the current climate.

**The consulting industry continues to spend far more than the national average on training, investing €37m in 2012, with an average per employee of €274 euro (2.5 times the Spanish average)**

These characteristics can be seen most clearly in some of the HR indicators for the industry (see Table 8). In the industry as a whole, the percentage of employees with higher qualifications increased in 2012, to 71.7% of staff. This is very much higher than the Spanish economy as a whole, where only 26.3% of the workforce have a university



degree. The present generation is often said to be the most highly educated in the country's history. A larger segment of the population now has access to university studies than ever before. Nonetheless, from a macroeconomic perspective, the prosperity of the labour market requires sectors with sufficient demand for qualified professionals to absorb increasingly higher-trained population cohorts. Consulting is one such sector.

Consulting firms are not content with just hiring university graduates; even recruits with the best academic records are not presumed to have completed their education and the sector spends far more on employee training than the rest of the Spanish economy. In 2012, Spanish consulting firms devoted a total of €37m to training, bringing per-employee spending on training to €274 – 2.5 times the Spanish average.

Investment in training in the sector fell in absolute and relative terms compared to 2011. Inevitably, during a downturn, companies want to cut back all areas of spending; however, in the case of the consulting industry, this change did not

**Over 70% of all employees in consulting firms were university graduates, as compared to a national average of 26%**

translate into a reduction in training activities for employees. The number of training hours per employee actually grew by 4.3% in 2012; we must therefore conclude that the fall in the training budget was due to a reduction on the cost of educational services.

### Distribution of revenue by service

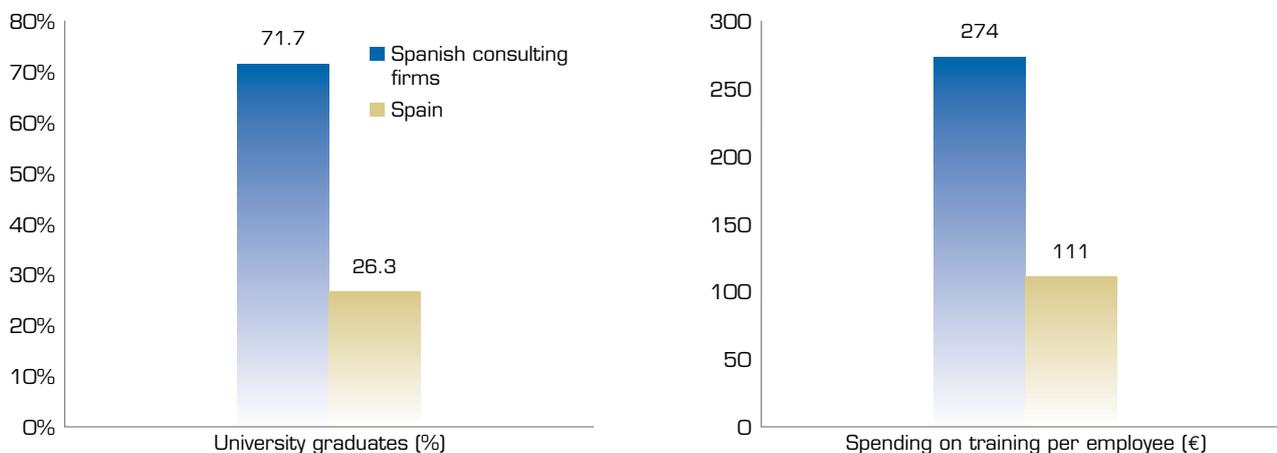
Income from sales of consulting firms was essentially concentrated in two types of service: outsourcing services, which in 2012

Table 8. Indicators for human resource policies in the Spanish consulting industry

	2011	2012
University graduates in Spanish consulting firms (%)	69.3	71.7
University graduates in Spanish economy as a whole (%)	25.5	26.3
Women in Spanish consulting firms (%)	33.4	34.2
Spending on training by Spanish consulting firms (€m)	39	37
Spending on training per employee by Spanish consulting firms (€)	305	274
Spending on training per employee in Spanish economy (€)	111	—
Training per employee in Spanish consulting firms (hours per year)	30.5	31.8

Sources: graduate workforce in Spain: INE, Encuesta de Población Activa; spending on training per employee in Spain: INE, Encuesta Anual de Costes Laborales; other figures: AEC.

Table 9. Comparative figures for graduate employees and spending on training in Spanish consulting industry and Spanish economy



Sources: graduate workforce in Spain: INE, Encuesta de Población Activa; spending on training per employee in Spain: INE, Encuesta Anual de Costes Laborales; other figures: AEC.

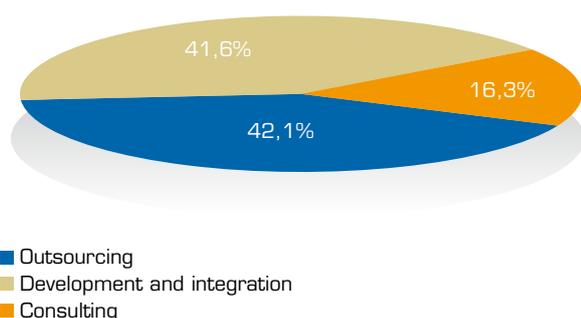
accounted for 42.1% of income from sales in the sector, and development and integration, which accounted for 41.6%.

The relative share of income from outsourcing was up on the previous year. Indeed, 2012 was the first year when revenue from outsourcing services exceeded that from development and integration, making this the

leading source of income for companies in the industry. This continues a trend that has been ongoing since 2004. In the context of the economic crisis, consulting clients are trying to alter cost structures and reduce overheads as far as possible. To do this, many opt to outsource certain areas of activity, especially when it helps improve operating efficiency.

Consulting services, on the other hand, followed the same trend as previous years, with their share of overall sales falling from 18% in 2011 to 16.3% in 2012.

Table 10. Distribution of industry income by type of service (2012)



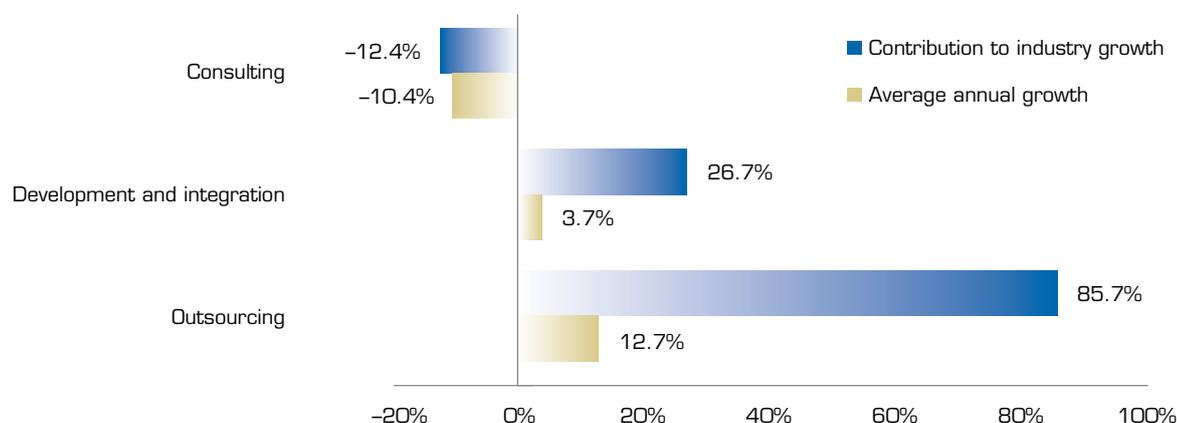
Source: AEC.

Growth in the sector in 2012 is largely due to the dynamism of outsourcing which have grown by 12.7%, faster than any other services on offer. This area accounts for 85.7% of the increase in sales this year (see Table 11).

Sales of development and integration services also increased in 2012, albeit more modestly. This area accounted for 26.7% of total growth in sales in the industry. Finally, the poorest performance was in the area of consulting services, which fell by 10.4% in 2012.



Table 11. **Average annual growth and contribution of most important services to growth in the sector (2012)**



Source: AEC.

### Internal make-up of income from outsourcing

The area of outsourcing contributes most to total turnover of consulting firms and much of the industry's prosperity depends on this field.

Among the outsourcing services offered by Spanish consulting firms, the most important are those related to application management, which currently accounts for half of all income in the area. In second place come IT-related services, which make up 25.2% of all earnings in the category. Finally, 25.1% of outsourcing revenue comes from outsourcing of core processes among client companies. Of these three areas, this is the segment which has grown most over the last year.

### Internal make-up of income from development and integration

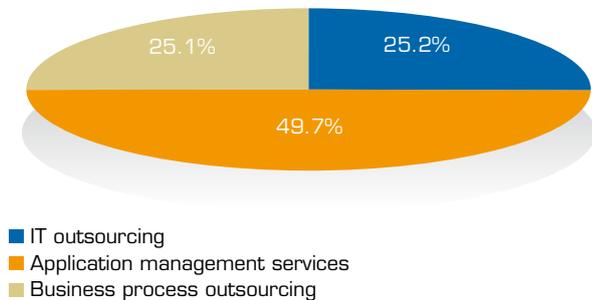
This area includes two differentiated services: application development and deployment and integration. The share of the former in income from this area increased to 76.1%, while the latter accounts for 23.9%.

### Internal make-up of income from consulting

The only area of business in which firms earned less in 2012 than in 2011 was that of conventional consulting services. Internally, this area is dominated by technological consulting, which generates 64.9% of sales in

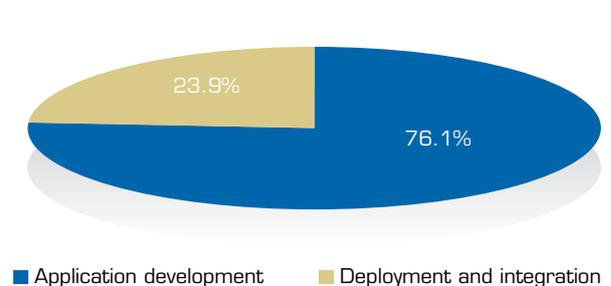
**For the first time, outsourcing has outstripped development and integration services to become the leading source of income: 87.5% of growth in consulting sales comes from outsourcing**

Table 12. **Distribution of industry revenue in outsourcing services (2012)**



Source: AEC.

Table 13. **Distribution of industry revenue in development and integration services (2012)**



Source: AEC.

this area, with the remaining 35.1% made up of business consulting. Here, there have been no significant variations with respect to previous years.

#### Distribution of revenue by client sectors

The Spanish consulting industry has a varied client portfolio, including companies from all industries. Nonetheless, most of the demand for consulting services tends to be concentrated in a small number of industries, either because of their size or their propensity to use these services.

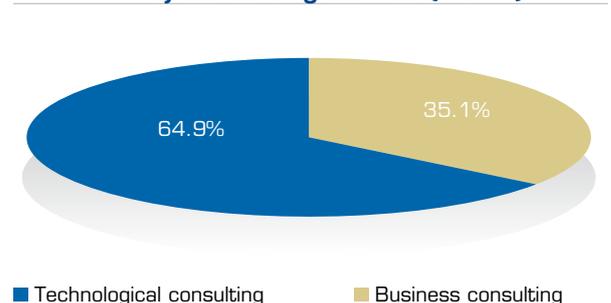
In quantitative terms, the chief client for consulting services is the financial services area. In 2012, financial institutions acquired consulting services to a value of €2,761 million, accounting for 26.1% of all income for the industry.

Next in order of importance came the telecommunications industry (17.3% of turnover for consulting services) and public authorities (17.2%).

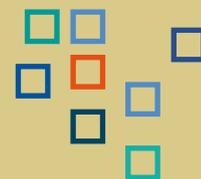
The relative proportion of sales to these three industries increased slightly. The case of

**The largest demand for consulting services comes from the most dynamic sectors of the economy: financial services and telecommunications make up 43% of business**

Table 14. **Distribution of industry revenue by consulting service (2012)**



Source: AEC.



government differs from the others in that income increased only as a result of to overseas demand, with sales to Spanish governments falling 15%, from €1,470 million to €1,245 million (see Table 16). This information is consistent with LICITA figures on trends in procurement spending by public authorities in 2011 and 2012.

Well behind the three top client sectors come the transport and energy industries, accounting for 9.6% and 7.5% of turnover respectively.

These five industries are not only the industry's top clients in quantitative terms; they are also the only ones whose relative weight increased between 2011 and 2012.

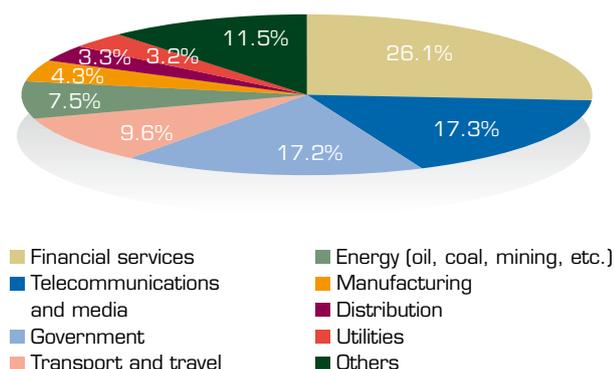
Other clients include manufacturing companies (4.3%), distributors (3.3%) and utilities (3.2%).

“Others” account for 11.5% of sales.

The relative importance of the clients of any industry can be measured by the “pull” effect they bring with their demand. During the period 2008-2012, when the economic crisis has been most evident, the top client groups have contributed very differently to growth in total revenue.

Demand from government fell by 15% in 2012

Table 15. **Distribution of consulting industry income by client industries (2012)**



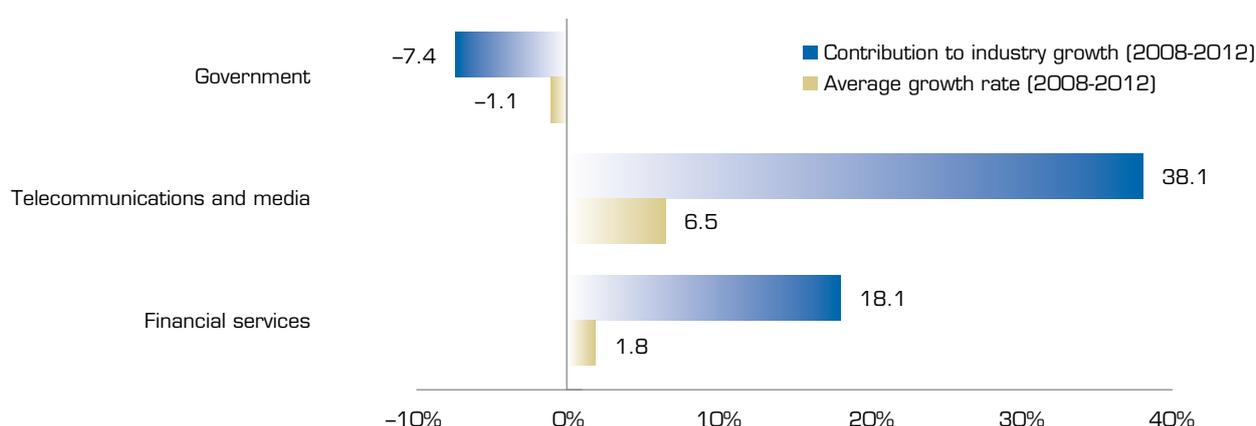
Source: AEC.

Table 16. **Income from sales to top client industries on the Spanish market (€m)**

	2011	2012
Financial services	2,445	2,378
Telecommunications and media	1,391	1,403
Government	1,470	1,245

Source: AEC.

Table 17. **Average annual growth and contribution of most important clients to growth in the sector (2008-2012)**



Source: AEC.

Table 17 shows the average variation and contribution to growth of the three top client groups. Of these, the one that has contributed most to growth in sales –accounting for 38.1% of the increase in consulting earnings in Spain for 2008-2012– is telecommunications and media, where turnover has grown at an annual average rate of 6.5%.

The “pull” effect of financial institutions has been more modest, at 18.1%.

The opposite has been true in the case of the third most-important client, government. Since the start of the crisis, sales to the sector have fallen at an average annual rate of 1.1%

and its net effect on sales growth has been negative.

### Forecast earnings for 2013

For 2013, sales in the consulting industry are forecast to increase by 2%. Based on this estimate, turnover for the sector would come to €10,787 million. This growth is predicted to continue to be based on income from sales abroad rather than on the Spanish market.

At the same time, companies in the industry do not forecast substantial alterations to the internal income structures, either in services or client industries during 2013.



# The importance of ICT and the consulting industry for Spanish competitiveness



**Victor Calvo-Sotelo Ibáñez-Martín**

Secretary of State for Telecommunications and the Information Society

I would like to start by thanking the chairman of the Spanish Association of Consulting Firms for his kind invitation to contribute, as the Secretary of State for Telecommunications and the Information Society, to the association's annual report, a document which has become a reference for decision-makers from all industries, particularly ICT (information and communication technology). Readers will undoubtedly find the wealth of data provided and the rigor of the analysis very useful.

ICT is essential in achieving sustainable economic development that will create employment in this country. It is therefore viewed by the government as a key sector, both because of its specific importance in the economy as a whole and because of its impact on improved productivity in other industries.

The ICT sector is currently in the midst of a process of transformation in which the government wants to work actively as a facilitator and a catalyst. Although the most important role in these changes clearly belongs to private enterprise, the government can and must have an active influence on future development, in order to benefit Spanish companies and the Spanish public at large.

The government's actions in the area of telecommunications and the Information Society are framed within the Digital Agenda for Spain, passed by the government on 15 February 2013, which seeks to develop the digital economy and society for the period 2013-2015. The Digital Agenda was presented jointly by the Ministry of Public

Finance and Government and the Ministry of Industry, Energy and Tourism and was drawn up with input from a large and representative number of social partners and agents from business and government.

For example, within the framework of the Digital Agenda, the Government is currently undertaking important actions, such as preparation of the new General Telecommunications Act, the Ultra-fast Networks Plan, the Plan for Internationalisation of the ICT Industry, use of the Digital Dividend and redesign of the system of aid to research, development and innovation, with the goal of contributing, as far as possible, to ensuring that the ITC sector continues to be one of the most active, dynamic and innovative in the Spanish economy.

One sector above all is dealing with the issues of transformation and innovation on a daily basis and that is consulting. Firms from the industry not only have the capacity to advise clients on improving core processes, but also bring their strategic vision and desire to accompany organisations in adapting to all forms of change. Consulting firms are home to many of the best-educated young people with the brightest prospects in Spain, attracted by the possibilities for career development and a highly-skilled job. I need not say how important this is in the current panorama of our labour market.

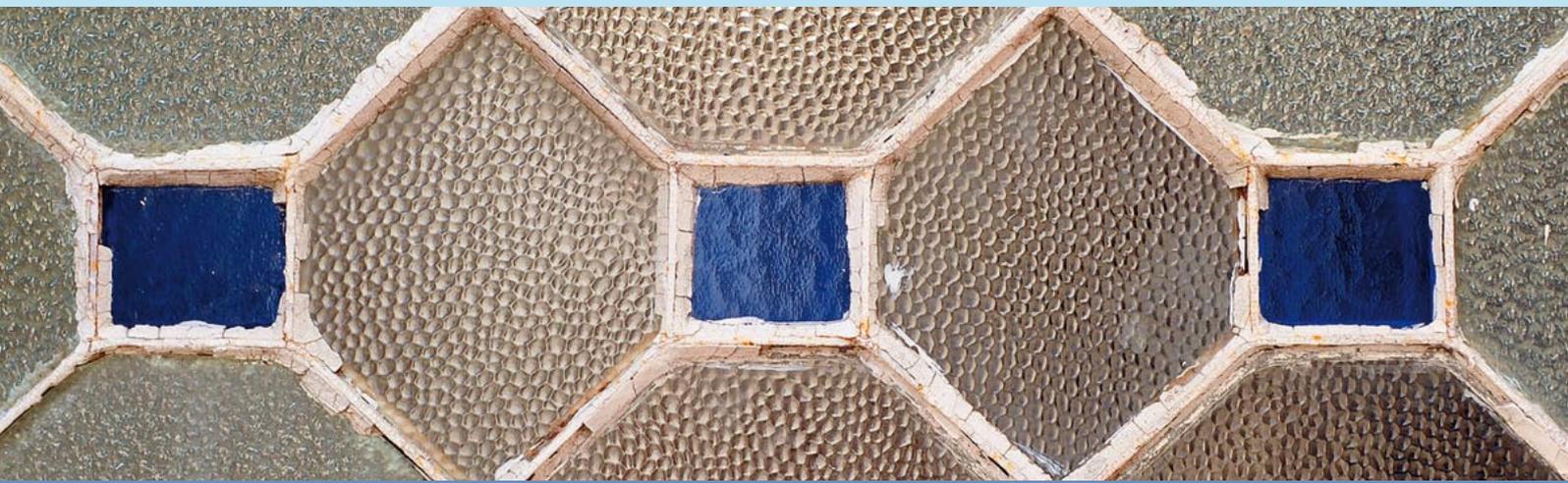
Thanks to the talent of these young people and the experience accumulated by their companies over the years, the Spanish consulting industry is heading national and international projects of great complexity that are helping attract business from other sectors, thus making a decisive contribution to increasing Spanish economic activity and competitiveness.

Although the current context of budgetary cutbacks has to some extent reduced the

importance of the public sector in the business of consulting firms, it remains a strategic sector for most of them. In this regard, it is only fair to recognise the role consulting firms can play in transforming all levels of the public sector, not only because of their capacity to propose innovative solutions, based in many cases, on their own internal transformation processes, but also because they can offer input on best practice among governments elsewhere, from whom it is always possible to learn.

Redesign of internal processes, elimination of bureaucratic burdens, new and other modern tools for attending to the public, exploration of the possibilities of public-private collaboration to tackle complex projects at a time of budgetary constraints, encouragement of transparency... these are just a few of the challenges the government faces over the coming years, in the face of which consulting firms can contribute by bringing to bear innovative solutions based, on occasions, on technological tools such as social networks, mobile technology and big data. Government, in turn, can facilitate exportation of the best of these solutions, acting as a top-level prescriber and contributing to the internationalisation of the Spanish ICT industry. Thus the relationship between the public sector and the consulting industry can bring important benefits for both parties.

Some of the indicators and figures contained in this report might be seen to paint a somewhat gloomy picture. Nonetheless, I would like to finish by stressing that, despite the current economic difficulties, Spain is a forward-looking country of opportunities. Recovery will have to be linked to a firm commitment to business innovation, improved competitiveness and the implementation of efficient and sustainable government. Given their capacity to create high added value –an aspect which, ultimately, characterises the consulting business– Spanish consultants have a very relevant role to play in the coming years.



# Acknowledgements

The **AEC** would like to thank all the firms who contributed to this report by providing both their information and their vision.

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