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Consultancy in Spain 2014
The Industry in Figures





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Spanish Association
of Consulting Firms



AECC



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Introduction



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Chairman of the Spanish Association of Consulting Firms (AEC)

Last year was a positive one for the Spanish economy; 2014 not only saw a clear improvement in macroeconomic indicators, but also net job creation. This is the first encouraging news on the labour market for some years and most data and qualified opinions seem to suggest that although there is still much work to be done, the worst of the crisis is now behind us.

Now that with hindsight, we are in a position to see just how severe this most recent economic period has been, the merits of the consultancy industry become all the more

obvious. Since 2008, annual turnover in the sector fell in only one year, 2013. The industry returned to growth in 2014 and the indicators and forecasts of consultancy firms suggest that 2015 will be even better.

This does not mean that it has been an easy road. On the contrary, the crisis has led to a reduction in productivity and eaten into profit margins. Nonetheless, Spanish consultancy firms are now well-placed to cope with a new stage of growth, mainly because the crisis has not affected their principal factor of competitiveness: the quantity

and quality of their human resources. During the crisis period, Spanish consultancy firms managed to retain and accumulate the talent they needed to compete. They demonstrated that when there is not enough domestic demand, they have more than enough capacity to penetrate foreign markets. Now we can only trust that the economic recovery will continue to take hold and that demand for services will start growing again on the domestic market, as indeed appears to be the case.

The prosperity of the consultancy industry is closely linked to demand from three

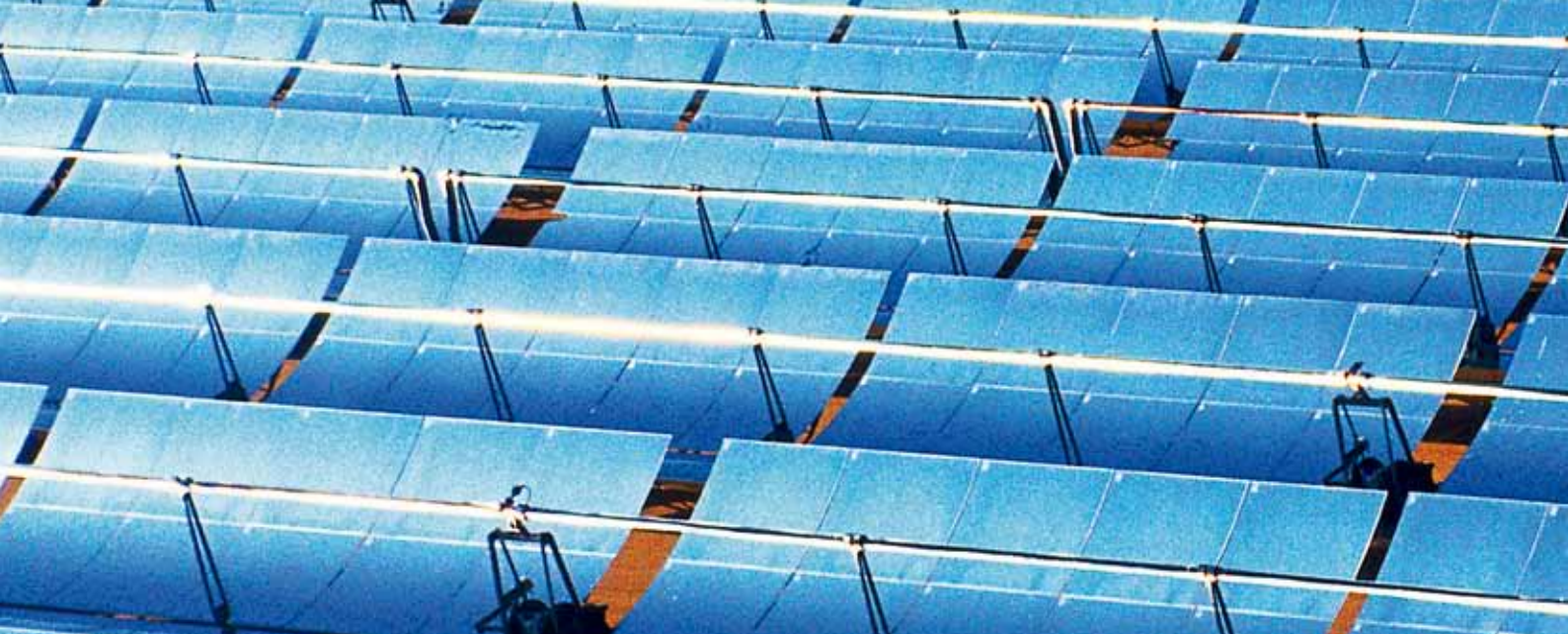
industries: financial intermediaries, government and telecommunications. It is the first of these sectors that had contributed most to boosting sales in the industry in recent years and we fully expect that it will continue to do so in the future. There are more doubts as to the contribution from government in the near future, since it depends on Spain's recovering certain budgetary balances and on the determination with which different tiers of government commit to modernising services to the citizen. Nonetheless, the relationship between government and consultancy

firms has proved beneficial for both parties in the past and will continue to be so in the future. Public authorities are increasingly focusing on satisfying the needs of citizens through flexible, effective and transparent procedures and to do this they require the accumulated knowledge and experience of professional consultants.

More than any other type of service, it has been the demand for outsourcing that has played the most important role in enabling the industry to increase sales during the years of crisis. Many clients have seen outsourcing as an

effective means of improving production efficiency and making services simpler and more effective to manage. Outsourcing now accounts for almost 45% of turnover amongst Spanish consultancy firms and given the trend in recent years, this proportion is likely to continue increasing.

Finally, I would like to thank most sincerely all the firms whose collaboration has made this report possible. I trust that it will prove interesting reading for everyone with a professional, academic or personal interest in learning more about the Spanish consultancy industry.



The Spanish consultancy industry in 2014

Executive summary

This report is intended to offer a thorough and meticulous description of the consultancy industry in Spain. It has been designed to serve as an aid to those in the industry and others with an interest in its essential characteristics and recent trends.

In preparing this report, we have used information furnished by a sample group of companies representing more than three quarters of all turnover in the industry. To analyse the information, we have utilised

statistical tools that will ensure the reliability of the results.

The following general conclusions may be drawn:

- Revenue in the industry was up 1.8% in 2014, thus recovering the upward trend lost in 2013, the only year to date in which there was a (small) fall in turnover. Sales by Spanish consultancy firms were boosted by a recovery in the domestic market, which grew by 2.6%. Unlike the situation during the crisis years, the increase in the turnover was



During 2014, the total value of sales by Spanish consultancy firms rose by 1.8% to 10.73 billion

once again sustained by the domestic market.

- A retrospective view of the industry's performance shows that it fared better than the Spanish economy as a whole during the period of economic growth and managed to retain income levels during the crisis. Combined with a strategy on the part of consultancy firms aimed at protecting their human resources base, this explains why the volume of employment in Spanish consultancy firms has grown every year since records began.
- The internal breakdown of revenue in the industry by type of service continued the trends of previous years. Outsourcing services have consolidated their position as the main source of income for Spanish consultancy firms, accounting for 44.7% of revenue.
- Income distribution by industries is also similar to previous years. The financial services sector continues to be the industry's leading client, accounting for 26.9% of turnover, with income from government remaining at post-crisis

values of 16.9%. The share of sales to telecommunications companies fell slightly to 13.9%.

- A general improvement in the Spanish economy and short-term growth forecasts for the country, combined with the forecasts of the consultancy firms themselves, suggest that the upward trend will continue in 2015, when a 4.3% increase is predicted

Income of the consultancy industry

The Spanish consultancy industry returned to growth in 2014. Turnover was up 1.8% to 10.73 billion, and the industry forecasts additional growth of 4.3% in 2015.

These figures offer some optimism for the future development of the industry. In addition, the growth of the last years has come as a consequence of an increase in domestic demand, which grew by 2.6%, with overseas demand remaining practically unchanged last year. As a result, the

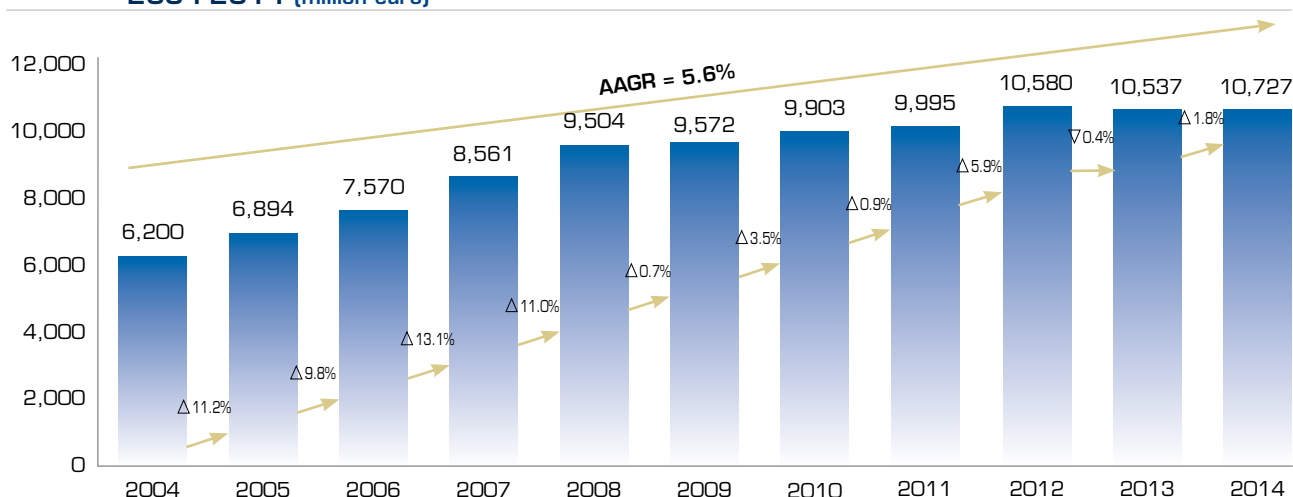
pendulum has swung back again, making Spain once more the industry's leading market, unlike the crisis years when sales to overseas markets were higher.

Since 2004, when the AEC first began publishing uniform comparative information on the Spanish consultancy industry, there have been two clearly-defined stages in income trends:

- Between 2004 and 2008, the industry saw strong and sustained growth. During this period, income grew at a rate of 11.3% per year, reaching a high of 13.1% in 2007.
- The period from 2008 to 2013 was characterised by stagnation in earnings, which grew at a much slower rate than previously: 2.1%. 2013 was the first –and to date the only– year when the income of the consultancy firms fell in absolute terms.

During this second stage, we can observe two interesting features. On the one hand,

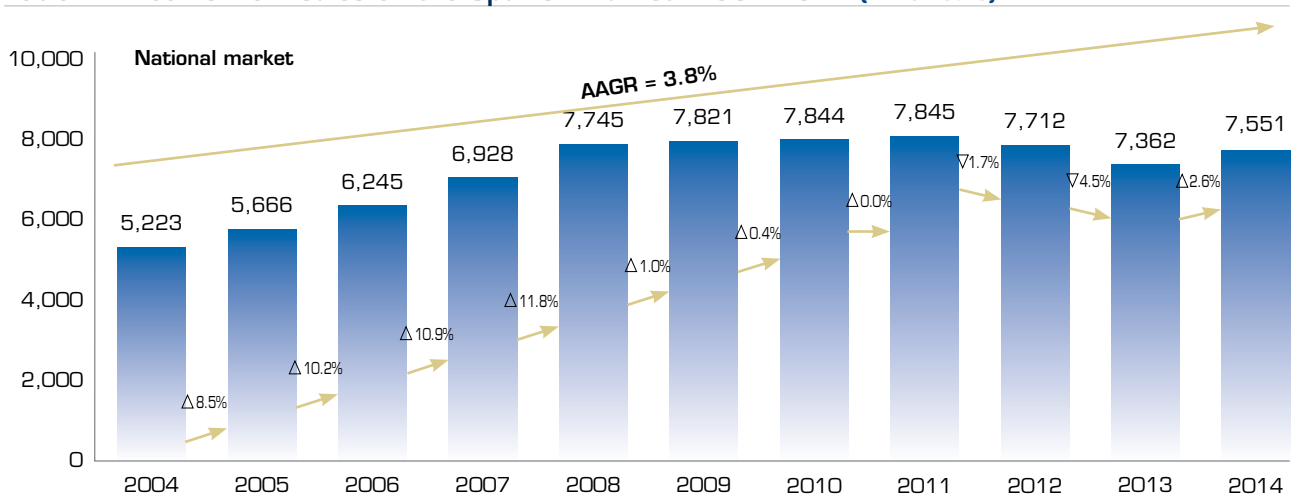
Table 1. **Total income from sales of Spanish consultancy firms and their subsidiaries abroad: 2004-2014 (million euro)**



AAGR: accumulated annual growth rate.

Source: AEC.

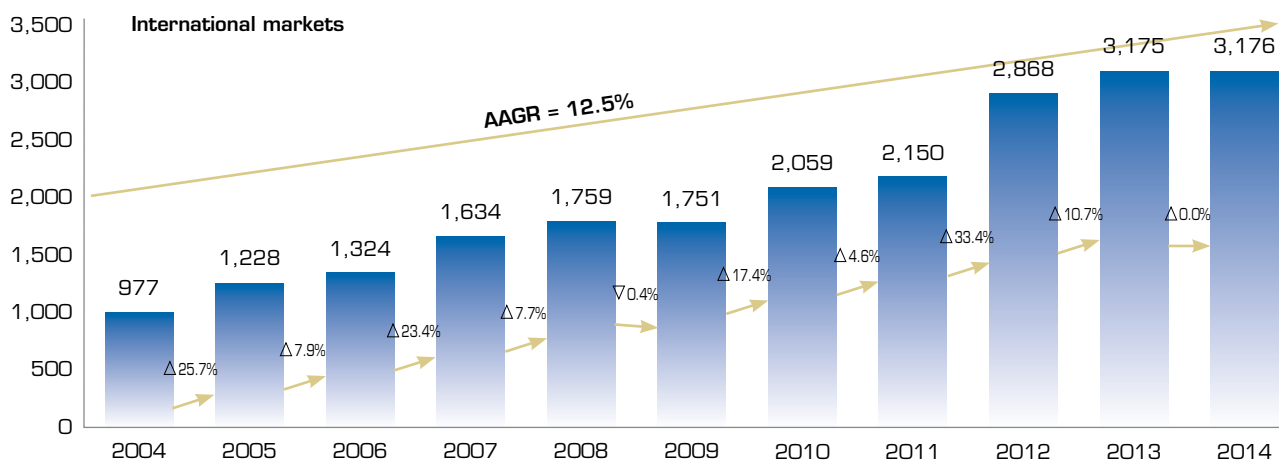
Table 2. **Income from sales on the Spanish market: 2004-2014 (million euro)**



AAGR: accumulated annual growth rate.

Source: AEC.

Table 3. **Income from sales on overseas markets: 2004-2014 (million euro)**



AAGR: accumulated annual growth rate.

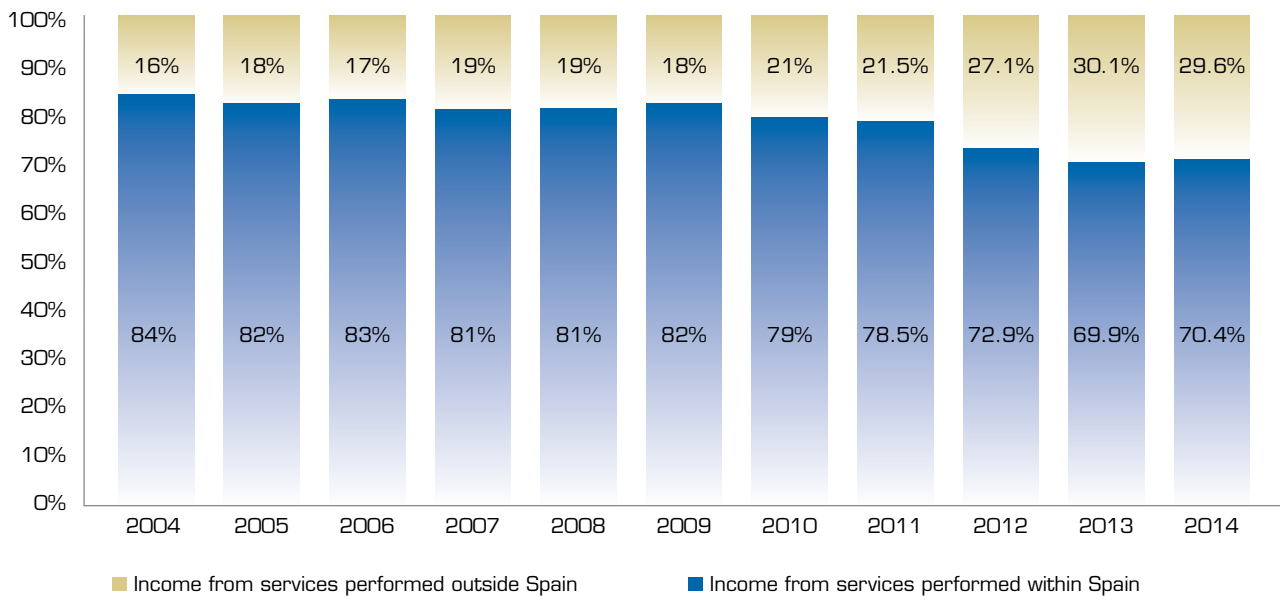
Source: AEC.

there was a shift in the source of the income, with income from sales of services abroad (via exports or output from overseas subsidiaries of Spanish companies) going from 19% of total sales to 30%. Indeed, the effectiveness with which Spanish consultancy firms maintained their turnover levels during this period of deep economic crisis can be attributed to their capacity to penetrate other markets. The second, very closely related, characteristic is that

throughout the crisis, trends in sales by the consultancy industry were ahead of the leading economic aggregates for the Spanish economy (output, GDP and Gross Value Added).

The figures for the last year show a change in cycle; sales in the industry rose again, driven by domestic demand; forecasts for 2015 are also optimistic.

Table 4. **Composition of income of Spanish consultancy firms by geographical market (2004-2014)**

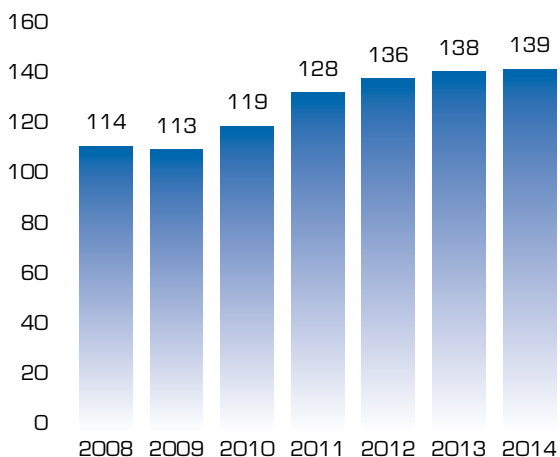


Source: AEC.

Employment in the consultancy industry

Spanish consultancy firms employ 139,470 people, of whom 76.8% work in Spain and the remaining 23.2% in overseas subsidiaries.

Table 5. **Workforce of Spanish consultancy firms (thousands of employees)**



Source: AEC.

The recent economic crisis has placed employment among the top of the list of economic policy priorities in western countries. This is especially true of Spain, where unemployment rates have traditionally been higher than other countries in the region. Fortunately, 2014 saw a change in trend and the number of salaried social security contributors grew by 190,000, after six consecutive years of job destruction. Nonetheless, this positive news should not blind us to the fact that between 2007 and 2013, more than 2.4 million jobs were lost in Spain. During this dark period for the Spanish labour market, the consultancy industry managed to buck the trend, creating 25,500 net jobs. Indeed, between 2004 and 2014, employment in the industry only fell in 2009, whereas in every other year, it rose above the rate for the Spanish economy as a whole.

Last year, the industry's workforce grew by 1.4%. And unlike previous years, this growth was due to an increase in staff

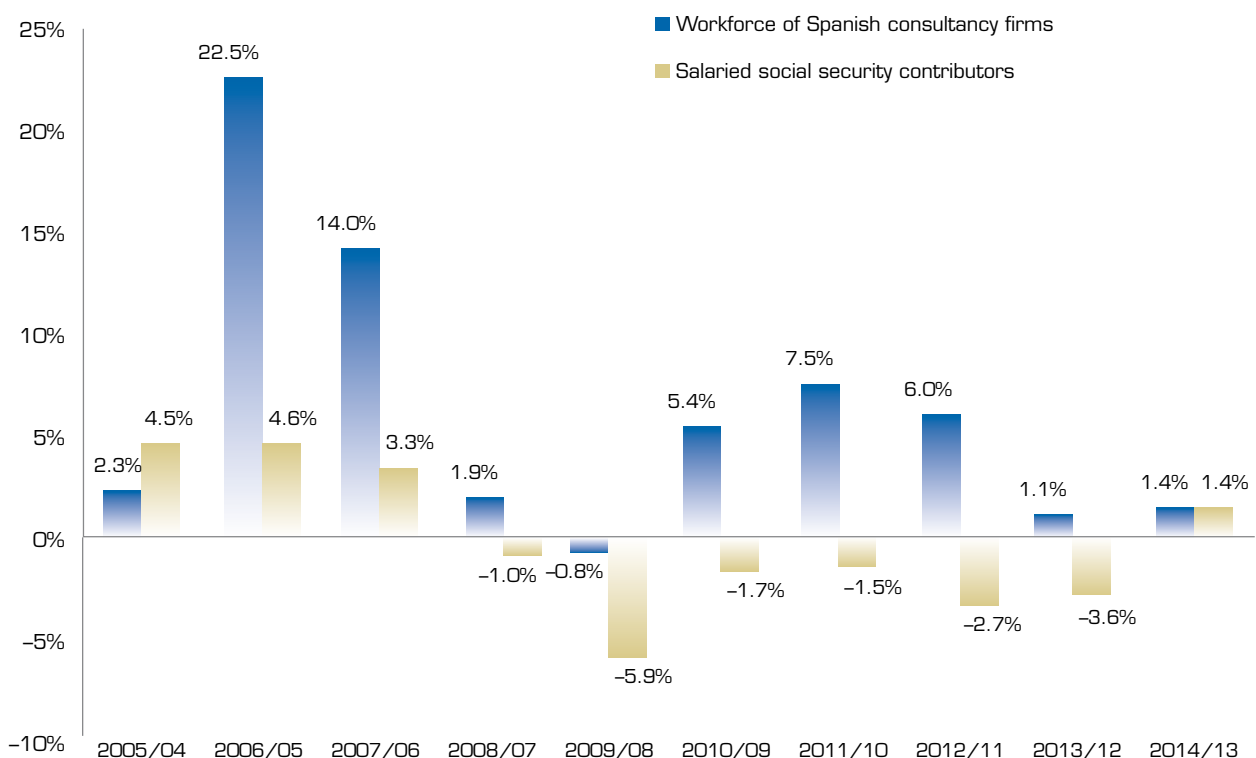
number in Spain-based establishments, where employment rose by 3.1%.

The policy of maintaining –or even increasing– the workforce throughout the economic crisis, combined with a reduction in sales, has inevitably impacted on productivity levels, which have fallen by as much as 8% in the last five years. Behind this reduction lies a strategy among most consultancy firms to sacrifice sales margins in order to maintain labour volumes and thus consolidate their HR base. This strategy is founded on the conviction that the end of the crisis will foster a scenario of growth in sales in which the firms that have the best supply of qualified employees will have an advantage over the competition.

Last year, the number of people employed in Spanish consultancy firms grew by 1.4%

When it comes to employment, quality is just important as quantity. In today's economy it is crucial for a country's competitiveness that employment is concentrated in activities –such as consultancy– that are knowledge-intensive and offer greater added value per worker. In Spain, employment in this type of industry fell in 2012 and 2013

Table 6. **Growth in workforce of Spanish consultancy firms and salaried social security contributors in Spain (2004-2014)**



Sources: workforce of Spanish consultancy firms: AEC; salaried social security contributors: Ministerio de Empleo y Seguridad Social.

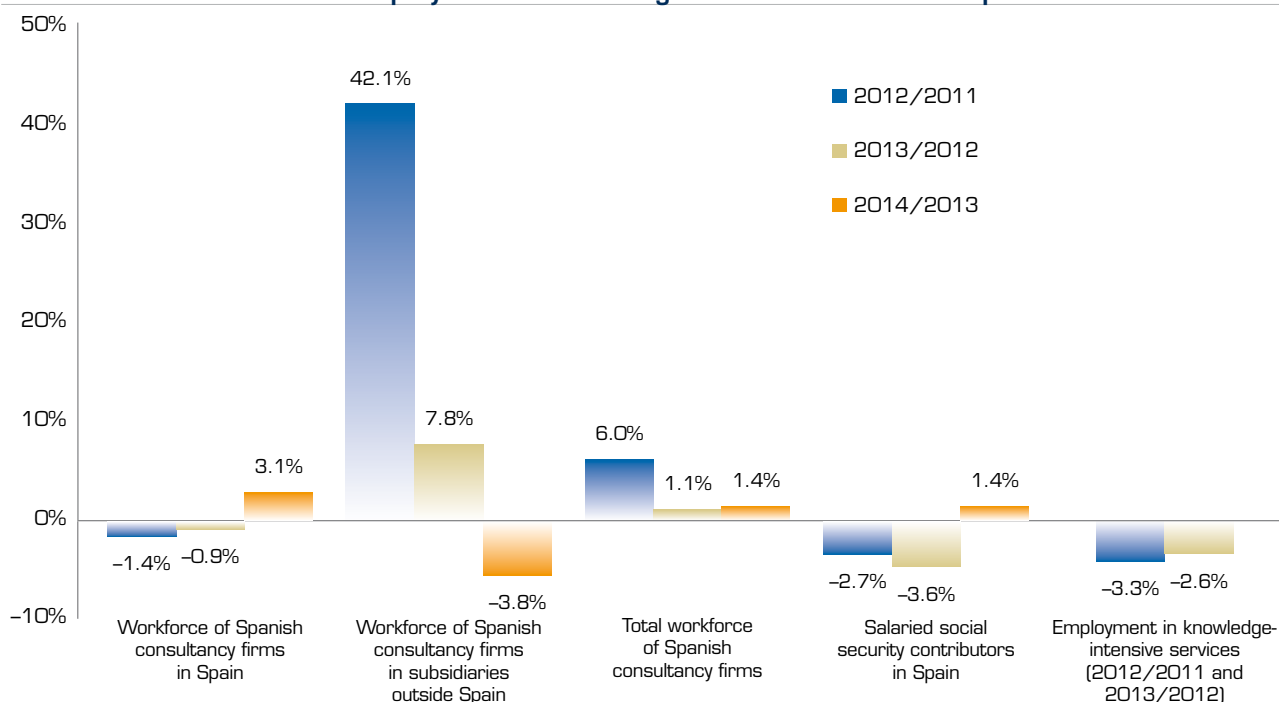
During the crisis, the strategy of Spanish consultancy firms has been to sacrifice sales margins in order to maintain workforces and consolidate their HR base

– the last years for which EUROSTAT has data. This is further proof of how positive trends in the consultancy industry have been.

Working in the consultancy industry requires above-average educational qualifications. Most employees in the industry (76.1%) have a university degree, as compared to around 26% in the economy in general. And the training process does not end with recruitment. The industry led the field in implementing the principle of lifelong learning. Consultancy firms themselves devote important resources to training their employees. In 2014, they spent €35 million on staff training. At €251 per employee, this figure is well above the level for most sectors. According to figures from the *Instituto Nacional de Estadística*, national staff training investment came to €101 per employee in 2013.

Nonetheless, during the economic crisis, consultancy firms spent less on training;

Table 7. Variations in workforce of Spanish consultancy firms, salaried social security contributors and employment in knowledge-intensive services in Spain



Sources: workforce of Spanish consultancy firms: AEC; salaried social security contributors: Ministerio de Empleo y Seguridad Social; employment in knowledge-intensive services: EUROSTAT.

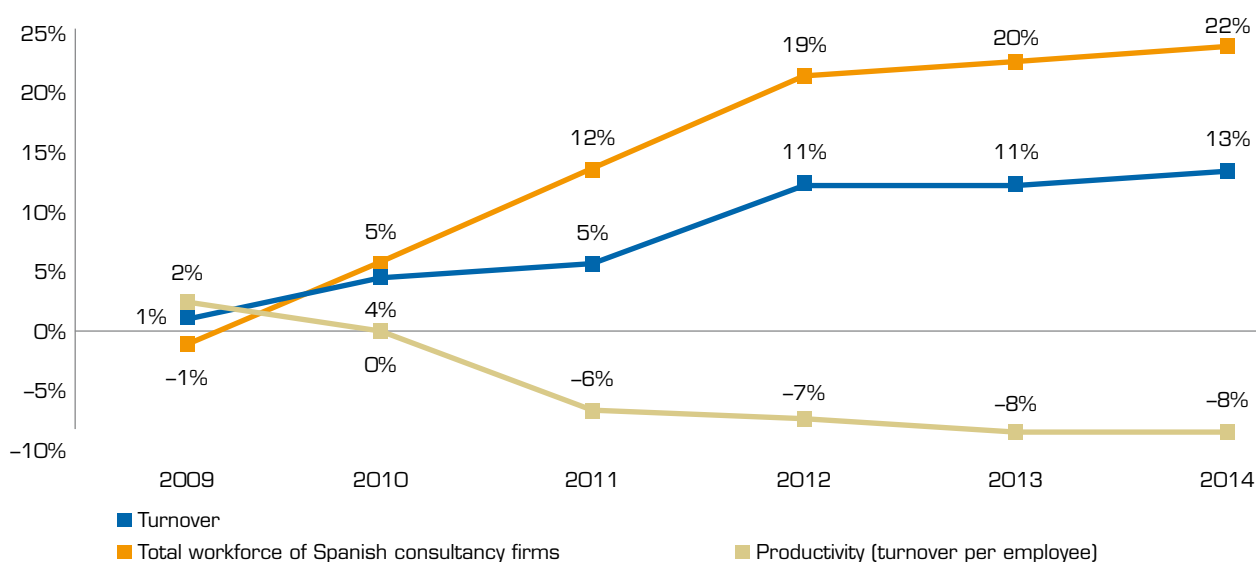
between 2011 and 2014, the amount spent fell by 18%. This figure needs to be viewed within the overall context of the efforts made by consultants to maintain or increase their workforces despite unchanging revenue, a fall in productivity and a reduction in business margins. In the immediate future if economic recovery is maintained and the industry's revenue

returns to pre-crisis growth rates, one may predict that investment in training will also increase.

Distribution of revenue by service

The services provided by Spanish consultancy firms can be divided into

Table 8. Percentage variation in turnover, workforce and productivity (turnover per employee) in the consultancy industry as compared to 2008 figures



Source: AEC.

Table 9. Indicators relating to HR policies in the Spanish consultancy industry

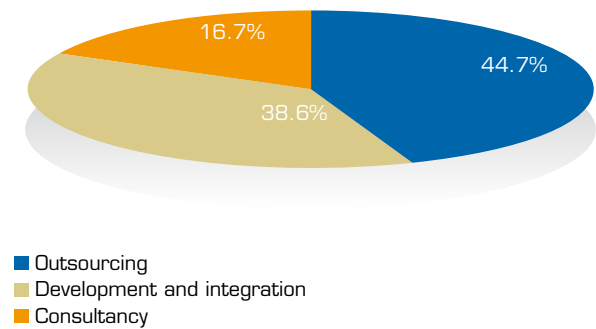
	2011	2012	2013	2014
University graduates in Spanish consultancy firms (percentage)	69.3	71.7	76.1	76.1
Overall Spanish workforce with university degree (percentage) (1)	25.5	26.3	26.4	—
Women in Spanish consultancy firms (percentage)	33.4	34.2	34.4	33.7
Expenditure on training by Spanish consultancy firms (million euro)	39	37	36	35
Expenditure on training per employee by Spanish consultancy firms (euro)	305	274	260	251
Expenditure on training per employee in Spanish economy (euro) (2)	111	102	101	—
Training per employee in Spanish consultancy firms (hours per year)	30.5	31.8	30.2	29.0

Sources: (1) INE, Encuesta de Población Activa; (2) INE, Encuesta Anual de Costes Laborales; other figures: AEC.

three categories: consultancy per se, development and integration projects and outsourcing services. In 2014, the distribution of earnings by type of service (see Table 10) remained practically unchanged on preceding years. The bulk of the revenue, 44.7% came from *outsourcing* services, 38.6% from development and integration projects and the remaining 16.7% from consultancy.

The only minor change compared to 2013 was a slight increase in the share of revenue from outsourcing, which rose from 44% to 45% at the expense of development and integration services, which fell by one percentage point. These minor variations confirm a trend that has been ongoing since records began (see Table 11), with outsourcing services becoming the principal source of income for the industry from 2013 and continuing to grow faster and contributing more to a growth in industry sales than other

Table 10. **Distribution of industry income by type of service (2014)**

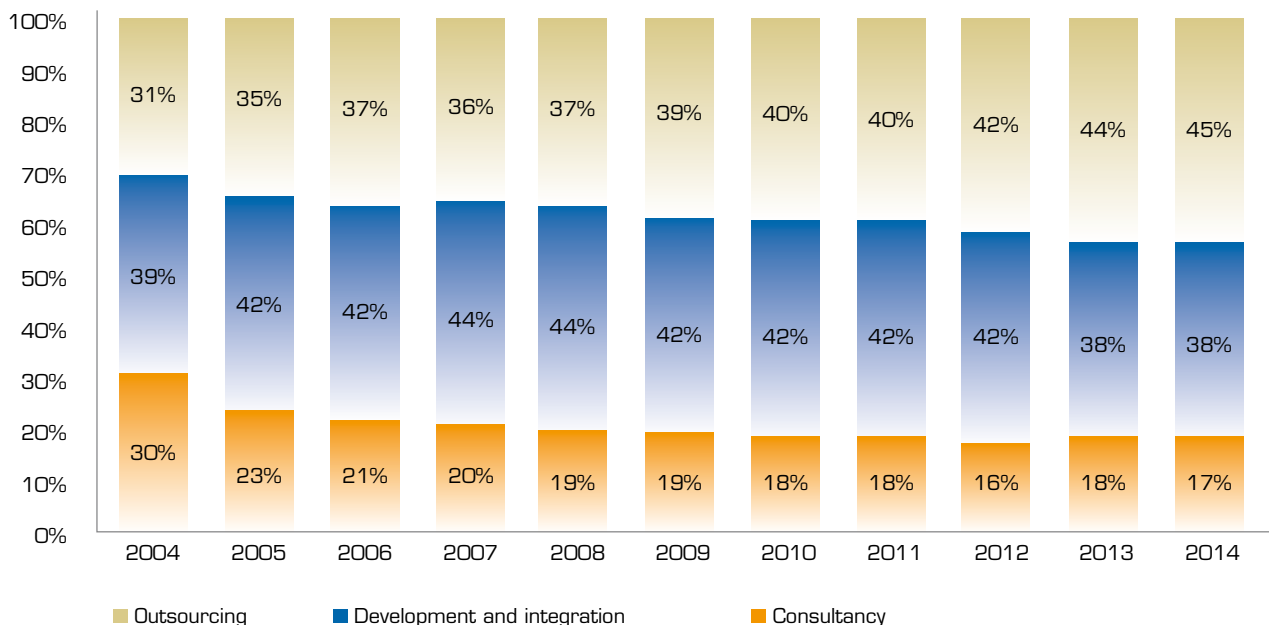


Source: AEC.

services. Overall, in the period between 2004 and 2014, 63.4% of the increase in income was attributable to outsourcing, while 38.1% was due to increased earnings from development and integration projects.

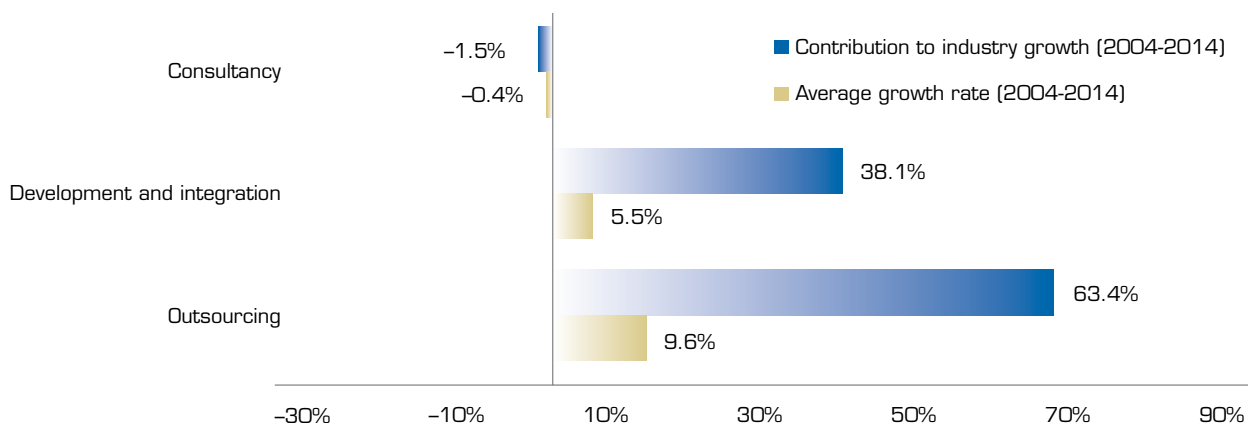
We will now look at each of these three basic services individually.

Table 11. **Distribution of industry income by type of service (2004-2014)**



Source: AEC.

Table 12. **Average annual growth rate and contribution by top services to industry growth (2004-2014)**

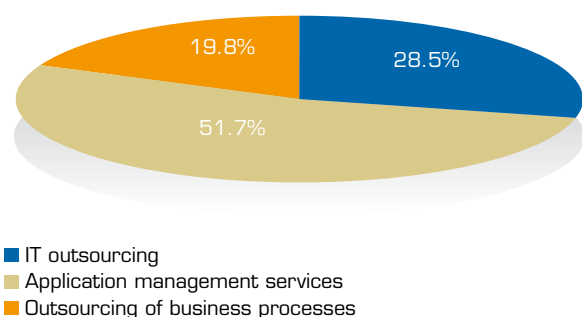


Source: AEC.

Outsourcing

Distribution of sales of outsourcing services was similar to the previous year, but outsourcing of business processes grew slightly at the expense of application management services. 51.7% of income in this area came from application management services. Outsourcing of IT is the second source of income in this field, accounting for 28.5% of all income. Finally, outsourcing of core processes represents 19.8% of total income in this area (see Table 13).

Table 13. **Distribution of industry revenue in outsourcing services (2014)**



Source: AEC.

Development, deployment and integration of applications

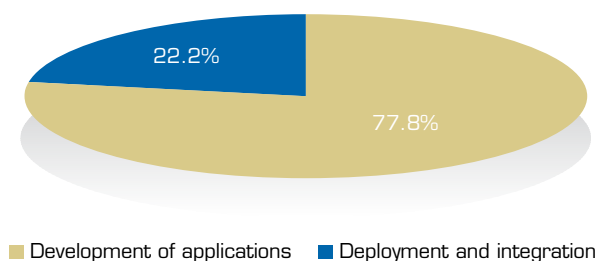
In the area of application development and integration, services provided by Spanish consultancy firms may be divided into two groups. In 2014, most income in this area (77.8%) came from development, while the remaining 22.2% coming from the sale of deployment and integration services (see Table 14).

Consultancy

The only area of business that generated less income in 2014 than in 2004 was that of conventional consultancy services. Nonetheless, this business lines continues to account for 16.7% of

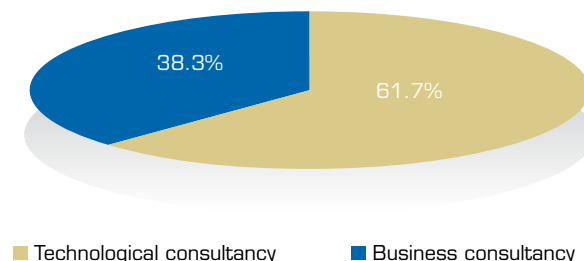
Most employees in the industry (76.1%) have university qualifications

Table 14. **Distribution of industry revenue in development and integration services (2014)**



Source: AEC.

Table 15. **Distribution of industry revenue by consultancy service (2014)**



Source: AEC.

total sales. Internally, this area is dominated by technological consultancy (see Table 15) which accounts for 61.7% of sales, with the remaining 38.3% made up of business consultancy.

Distribution of revenue by industries

Spanish consultancy firms provide services to an extensive range of clients from practically all areas of economic activity (see Table 16).

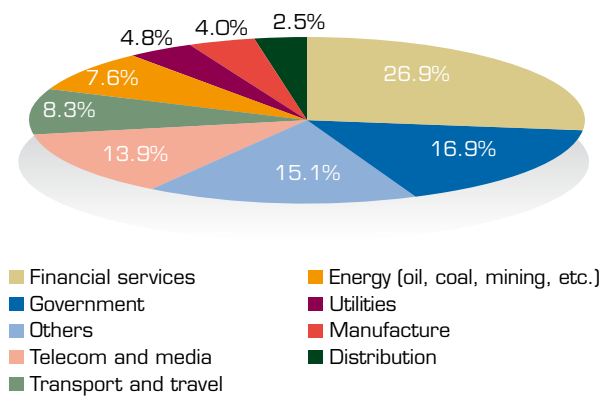
Traditionally, one of the industries with the largest demand for consultancy services is the financial services sector. The relationship between financial institutions and consultants goes beyond the normal supplier/customer relationship, sometimes involving a concurrence of strategic interests. In 2014, financial institutions acquired €2.88 billion worth of consultancy services from Spanish firms, equivalent to 26.9% of the industry's total earnings. That same year, sales to government authorities came to €1.81 billion, 16.9% of the total. The third most-important

sector was telecommunications, which accounted for 13.9% of sales (€1.49 billion).

Sales in these three industries represent 57.7% of the industry's total revenue. The other 42.3% is divided up between transport firms (8.3%); the energy industry (7.6%); utilities (4.8%); goods manufacturers (4.0%) and distributors (2.5%). Other miscellaneous clients make up the remaining 15.1%.

The three most important industries for Spanish consultancy firms have performed very differently (see Table 17), especially since the beginning of the crisis. The share of sales attributable to financial institutions initially fell but then recovered gradually to account for 27% of turnover, exactly the same figure as in 2008. Government followed the opposite path: immediately after the beginning of the economic crisis, demand for consultancy services grew rapidly and this sector's share of total turnover rose from 20% in 2008 to 27% in 2009. In 2011, government spending on consultancy services fell rapidly, in

Table 16. **Distribution of industry revenue by sector (2014)**



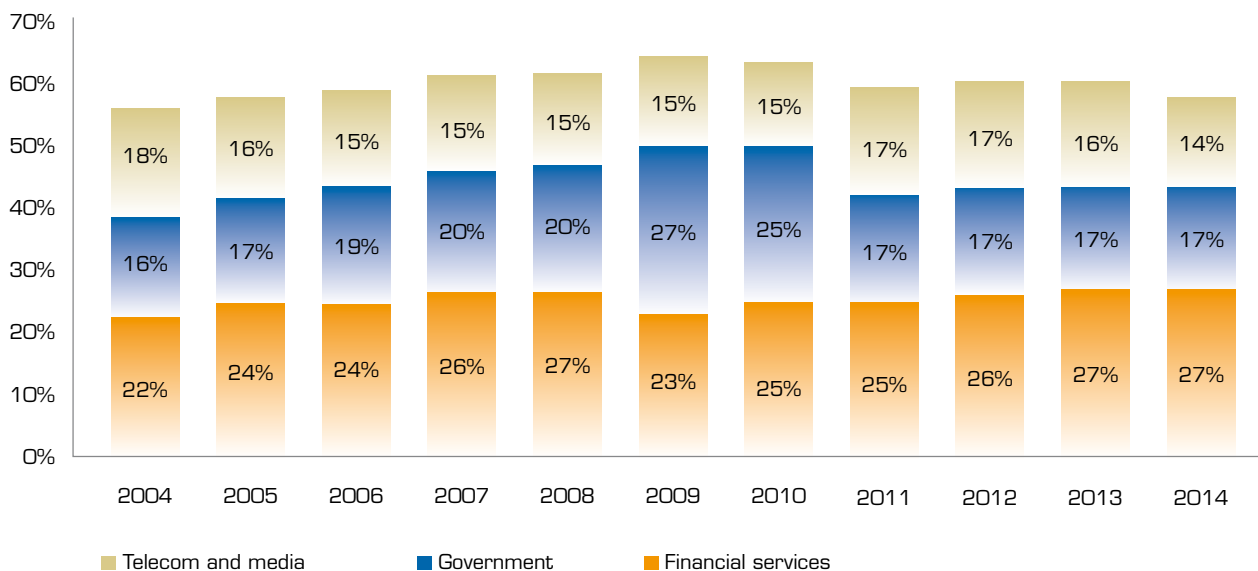
Source: AEC.

both absolute and relative terms, and since then it has remained stable at around 17% of the total. Finally, sales to telecommunications companies have remained much more stable, accounting for between 15% and 17% of the industry's revenue throughout this period. Nonetheless, last year, the relative contribution to sales of these clients fell slightly, to 14%.

Financial institutions not only represent the most important source of income for Spanish consultancy firms, but have also been the principal driving force for growth throughout the period since the outbreak of the economic crisis (2008-2014). During that period, the increase in revenue from sales to this sector has accounted for 26% of the total increase in income from consultancy services (see Table 18). In contrast, sales of consultancy services to government fell in absolute terms, from 1.90 billion in 2008 to 1.813 in 2014. For their part, investment by telecommunications firms in consultancy services accounts for 5.4% of the increase in total income during this period.

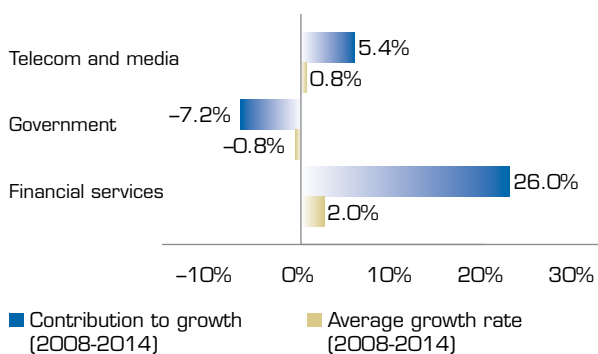


Table 17. Comparative weight of the three largest industries by demand for consultancy services (2004-2014)



Source: AEC.

Table 18. Average annual growth and contribution of most important clients to growth in the sector (2008-2014)



Source: AEC.

suggest that this increase will be based on a rise in sales to the financial services sector and government, both domestic and overseas. The increased earnings forecast for these two sectors accounts for 71.9% of the forecast growth in total sales for the year (see Table 19).

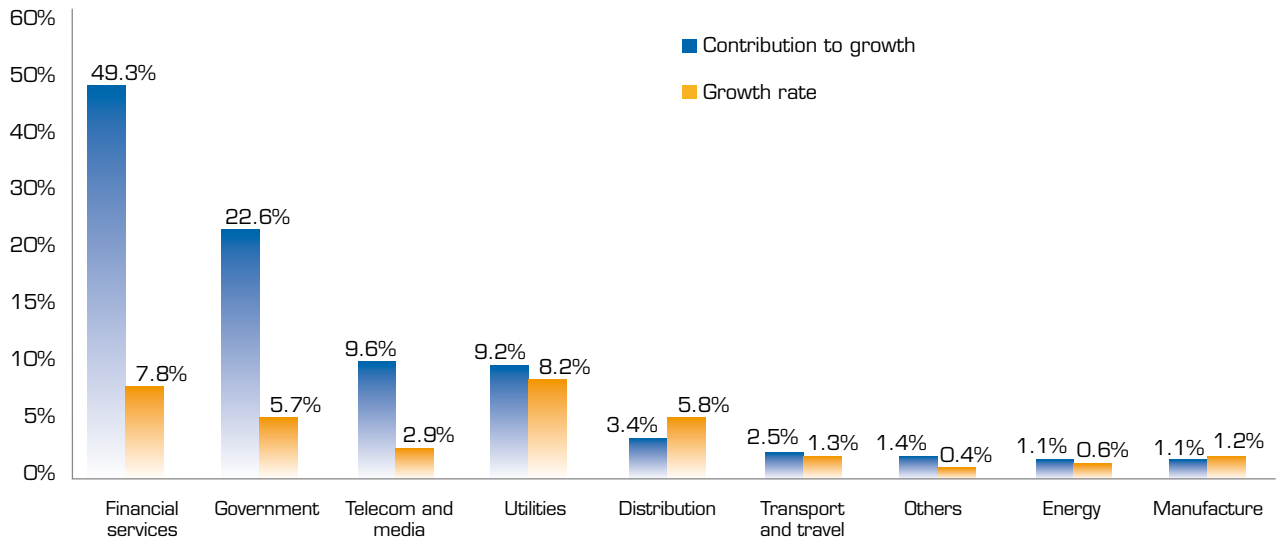
The industry in which the increase in demand for consultancy services is forecast to be highest is utilities, at 8.2%. Sales to financial services companies (7.8%), distributors (5.8%) and government (5.7%) will also grow considerably above average.

According to these figures, the composition of sales by sectors will not vary substantially on previous years (see Table 20) and previous trends will continue, with a slight increase in the share of the financial services and no change in the figures for government and telecommunications firms.

Sales forecasts for 2015

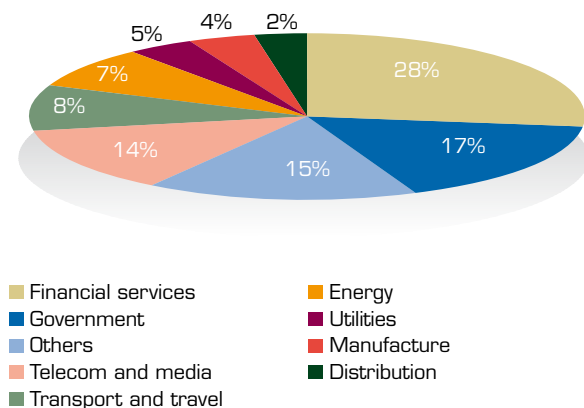
Forecasts for 2015 indicate a moderate increase in income. Total turnover is predicted at 11.19 billion, 4.3% up on 2014. The forecasts

Table 19. Rate of variation and contribution to growth in sales of client industries (2015/2014)



Source: AEC.

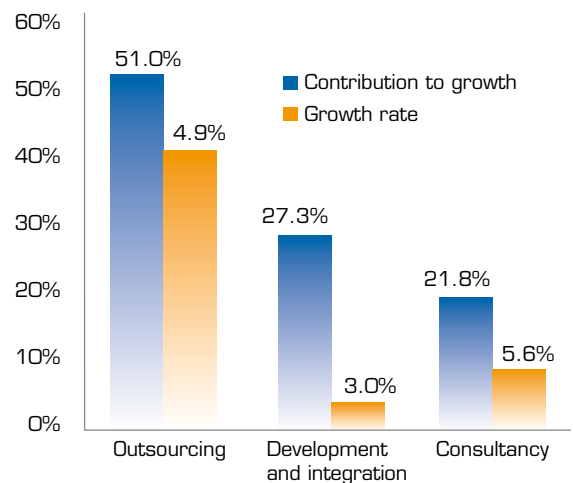
Table 20. Forecast distribution of income of consultancy firms from client industries (2015)



Source: AEC.

As for the types of service, a slightly higher growth rate is forecast in consultancy services than in *outsourcing* and development and integration (see Table 21). Nonetheless, the increase in

Table 21. Rate of variation and contribution to growth in sales of services (2015/2014)



Source: AEC.

sales in 2015 will be quite uniformly distributed and as a result, the internal structure of the industry's income from services will remain practically unchanged.



A profession in consultancy in the twenty-first century

AEC Talent Management Commission

If there is one thing that defines humankind it is a search for knowledge, a need to find answers to all the great and little questions of existence. One might say that the origins of consultancy go back as far as the human race itself. Whenever we needed to satisfy that need for knowledge, we have always turned to experts for advice.

In a way, the gurus and royal counsellors of old could be seen as the true precursors of today's consultant, a figure with many profiles and many functions: the consultant as advisor, the consultant as legislator (designing a method, procedure or tool to be used), the consultant as trainer and the consultant as monitor, directly taking charge of implementing the recommendations.

René Descartes once said that only two things contribute to advancement: going

faster than others and taking the right road. Consultancy caters precisely to these two great requirements for success: anticipation in undertaking progress and the choice of route to be followed. Consultancy provides the knowledge and skills needed to resolve practical problems related to the strategy and running of companies – companies who feel the need to seek advice from third parties on the complicated road to business excellence. The consultant can offer an external overview of the organisation, unconditioned by its own internal dynamic and circumstances, ensuring a high degree of competitiveness, productivity and sustainability.

The word that best defines consultancy is *help*. Helping companies with viable and appropriate measures geared towards achieving different objectives: among them solving specific problems, achieving the

targets established in the company's strategy and improving the company's management and practices, all with a view to becoming a high-performing organisation. Companies hiring consultancy services have been shown to achieve an average rate of return of €7.7 for every euro invested.

However, perhaps the more important aspect of an industry such as consultancy, with more than 139,000 employees, is that its prestige is based on the talent of the people who work in it. The cornerstone of this profession, as old as humanity and so necessary for any project looking to the future, is the consultant. Consultants are professionals whose well-defined skills include transmitting the knowledge and experience they have acquired in order to contribute differential value to the client.

Consultants' primary function is to identify the client's problems and business opportunities, becoming a reference point for each client with whom they must establish a collaborative relationship in conducting or proposing definitive and lasting arrangements.

And order to exercise that function, acting as a business compass, they must have a broad understanding not only of the client, but also of the client's sector and competition. Only in this way can they anticipate market trends and promote the necessary change management in the organisation. This is why one of the skills most valued among consultants is a holistic vision that can embrace technical, business and client-related aspects.

Another of the consultant's functions is to optimise organisations and their processes, increasing the value of their business and contributing a clear economic return on their work. As well as being client- and results-oriented, consultants must also have a set of "soft skills", including a

Organizations hiring consultancy services achieve an average rate of return of €7.7 for each euro invested

capacity for learning, teamwork, empathy, capacity to communicate and listen, capacity for synthesis, emotional intelligence, leadership and capacity to influence, flexibility and sensitivity to change, proactivity, organisation and planning, and creativity to offer innovative and different solutions.

And these human skills must be accompanied by a series of technical ones. The most important are a third-level qualification (over 76% of consultants are university graduates), an excellent level of English and certification as experts in the specific area of work. These basic requirements will later be complemented with training in consultancy methodologies and a knowledge of core processes. As a result, the industry place great importance on staff training, investing 2.5 times more in this area than other industries.

So far, we have seen what consultancy is and the skills and capacities a consultant requires. But what can consultancy contribute, professionally and personally, to people working in the profession? The opportunity to form part of an industry that is of strategic importance for the knowledge society, an industry that has managed to create over 25,000 new jobs in the last six years at a time of net job destruction elsewhere in the Spanish economy. Most agree that it is a demanding job; a career in consultancy involves a constant learning

In the twenty-first century, consultancy will continue to offer society increasingly innovative and technological solutions from the best professionals, creating value from the present for the future

process, due to the variety of projects consultants have to work on with different companies, organisations and industries. Consultancy firms try to make the work of their professionals motivating; each day is different and working with people and companies with different problems brings fresh expertise.

As well as offering an attractive and challenging diversity of projects and an overview of business, consultancy also offers a career with real promotion opportunities based on meritocracy and business growth, lifelong learning and an attractive payment model that combines a fixed salary and a series of variable results-based bonuses. And many consultants recognise that another of the incentives to a career in consultancy is that it can offer real opportunities to end up working with clients, in positions of leadership as directors or area heads.

To sum up, consultancy essentially consists of transmitting knowledge and experience from one individual or team of experts to another in order more easily to achieve a human goal. This is an activity born out of humans' need to learn from others, which

has become more important as society has become more specialised and technological.

In a society that is supported ever more by technology, we need people who can serve others by bringing their special expertise to bear on some specific aspect of the current situation. Unlike the earliest periods of humankind, when so-called "sages" were expected to master every field of knowledge, it is no longer possible for one person to keep track of all the knowledge accumulated by scientific and technological development. We need specialists in different fields, and consultancy firms have become real collective gurus, driven by the best specialists, providing the best advice to meet the increasingly sophisticated demands of business and society. In the information and knowledge society, in the most technological age humankind has known, people are still the main protagonists. And consultancy firms need to be sure they have the best professionals, because that will be that factor that gives them the edge on the market.

In the twenty-first century, consultancy will continue to offer society increasingly innovative and technological solutions from the best professionals, creating value from the present for the future while at the same time preserving our inheritance for future generations. That is why this industry –our industry and our professionals– will play a central role in the information and knowledge society.



Acknowledgements

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