

2018

Consultancy in Spain

THE INDUSTRY IN FIGURES

► Next



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Introduction



Once again, I am very pleased to present this report giving details and analysis of some of the key business figures of Spain's consultancy industry.

In 2018, the industry had revenue of 13,714 million euro, 5.9% up on the previous year. The continued growth in income since 2014 is undoubtedly due to the profound transformation currently being experienced amongst organisations from all sectors and to the growth of the Spanish economy as a whole.

The digital transformation means not only incorporating new technologies into business, but also changing business processes and corporate culture. And as this report shows, our IT consultancy firms are successfully leading these developments.

Consultancy is an important creator of quality employment. In 2018, the workforce rose by 9.4% to 186,000 people, continuing a trend that has been maintained since 2009.

Sixty-eight percent of staff have higher qualifications and of these, 67% have STEM (Science, Technology, Engineering and Mathematics) degrees the most highly valued in digital transformation processes. As well as academic qualifications, when recruiting new staff, consultancy firms value a series of soft skills, including a capacity for learning, teamwork, a results-oriented approach,

The technologies that are spearheading the change towards a digital model are big data & analytics, cybersecurity, automation and robotization and cloud computing

customer-orientation, initiative and proactivity, adaptability to new situations and capacity for effective communication, as this report shows,

Consultancy projects require a continuous updating of knowledge and skills. For this reason, companies in the industry invest more than three times the Spanish average in training their human capital. Significantly, 60% of total training hours are given over to advanced technologies and methodologies, which are becoming increasingly important in developing new business models.

As the study shows, the leading technologies in the shift towards the digital model are big data & analytics, cybersecurity, automation and robotization and cloud computing. And while demand for all of these areas has grown strongly in recent years, the results suggest that in future projects, big data & analytics and artificial intelligence will play the largest role.

As in previous years, our largest client sectors are financial services, government, energy and utilities and telecommunications, which look to consultants as facilitators of digital transformation processes.

In terms of the relative distribution of services provided, in recent years consultancy and outsourcing services have grown faster than development & integration.

This year, for the first time, the report gives a breakdown of RDI investment by consultancy firms. As the figures show, they invest over 2.8% of income in innovation. This compares favourably to the EU average and is twice the figure for Spain as a whole, and shows the strategic part played by the industry in the overall competitiveness of the Spanish economy.

This year's report includes a section with comments from the top executives of each of our member companies on the importance of innovation in their work and in the economy as a whole.

Investment in RDI by consultancy firms shows the industry's strategic role in the competitiveness of the Spanish economy

As chair of the Spanish Association of Consultancy Firms, I trust that this report will provide an accurate snapshot of the current state of the industry and the important contribution it is making in the transformation towards a digital economy a change that will benefit Spanish society and the welfare of all its citizens.

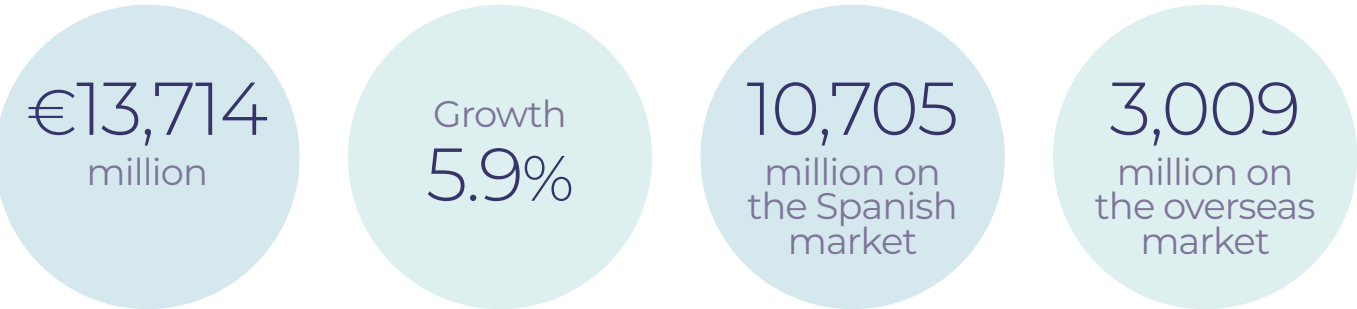
This report would not have been possible without the generous collaboration of the many consultancy firms—from inside and outside our organisation—who answered our survey and provided precise data. I would like to thank them all most sincerely.

Elena Salgado
Chairwoman of the Spanish Association of Consulting Firms (AEC)

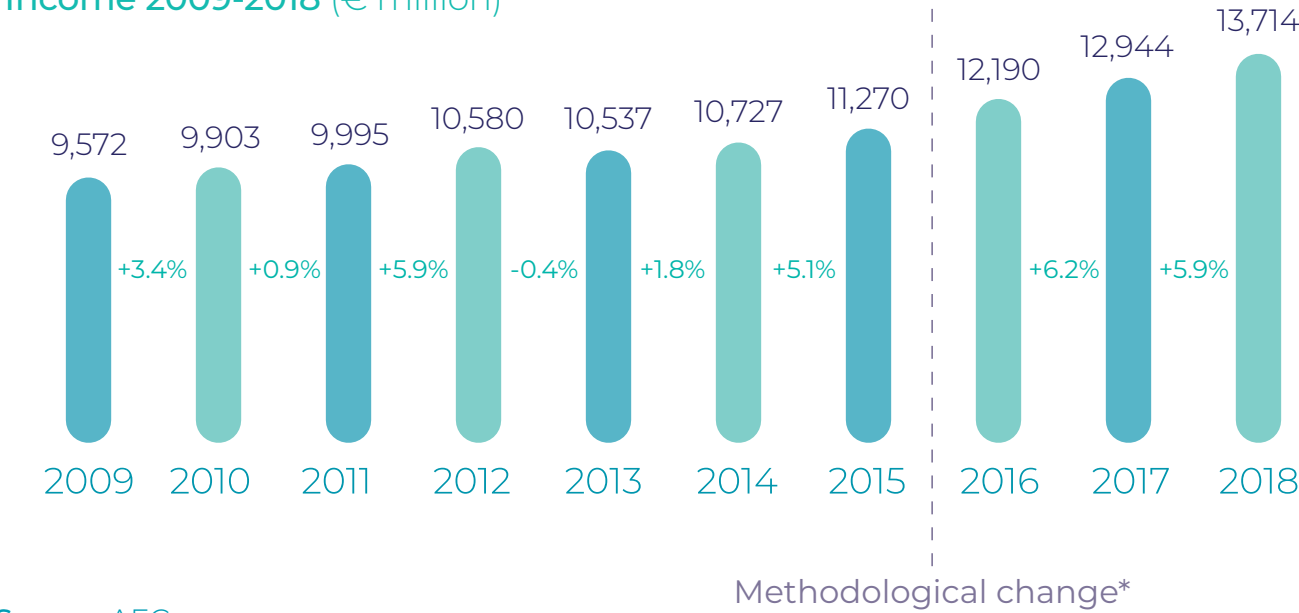
Key figures

Revenue 2018

Growth on domestic market twice as high as on overseas market.



Income 2009-2018 (€ million)



Source: AEC

Employment 2018

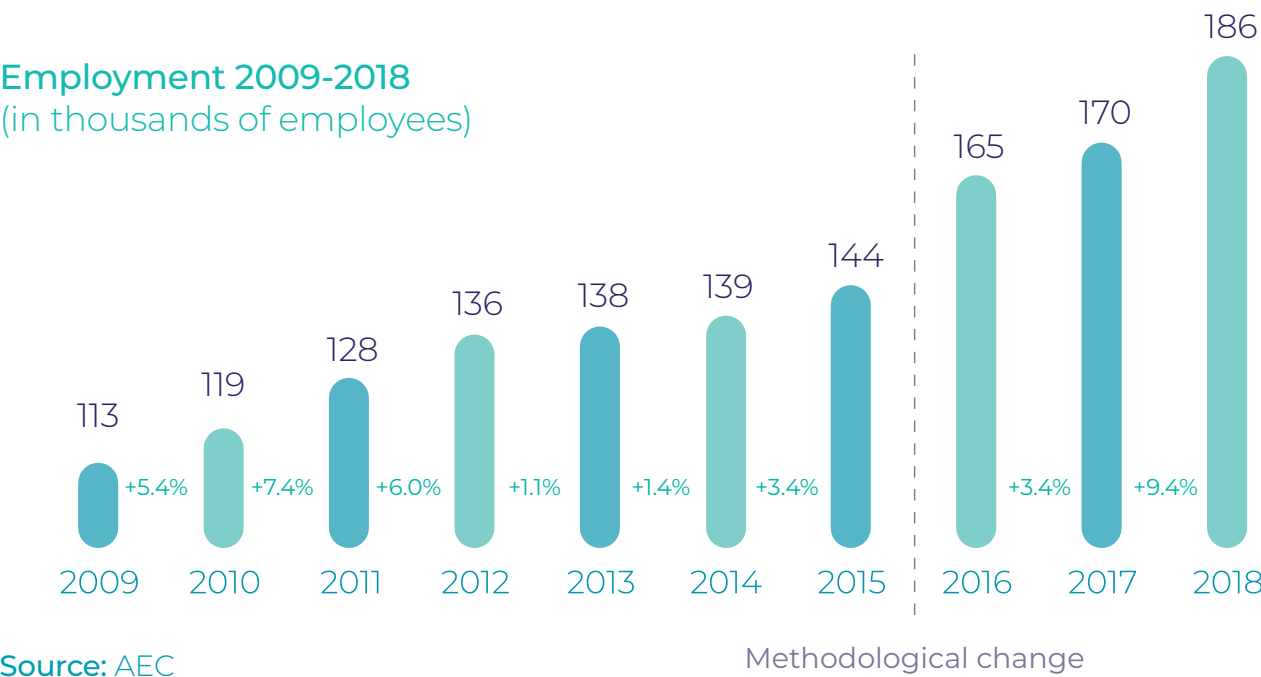
The industry continues to create more high-quality employment

186,000 employees



*Methodological change extending the scope of the analysis of the industry

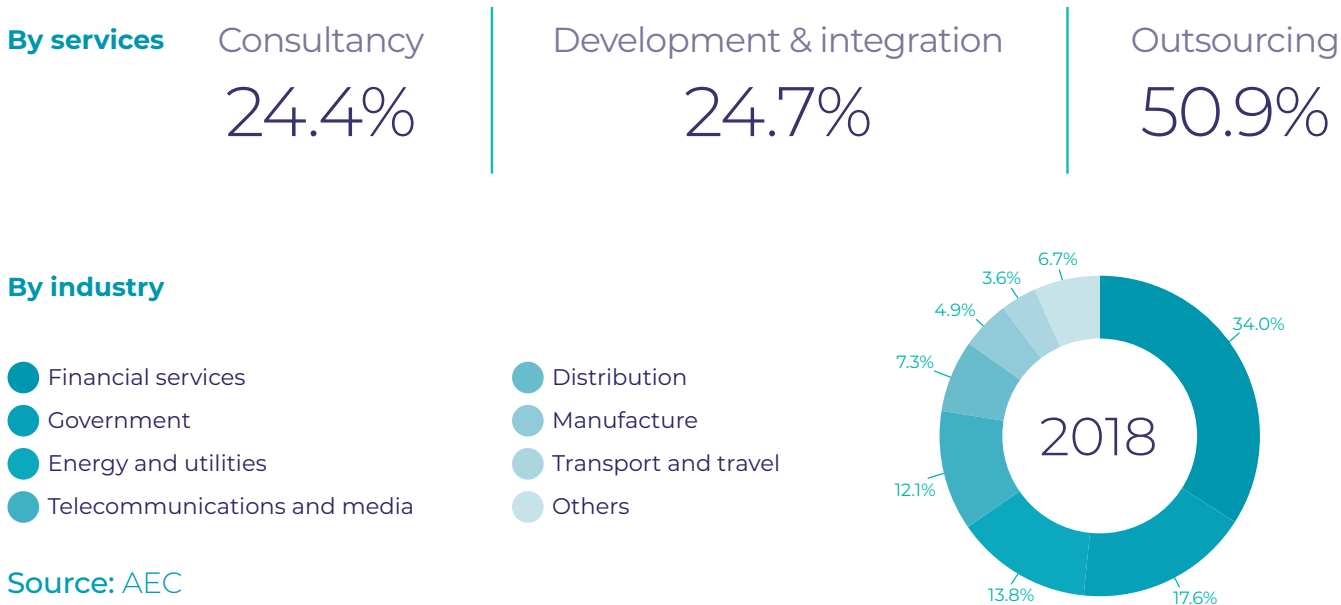
Employment 2009-2018 (in thousands of employees)



Source: AEC

Revenue distribution 2018

Consultancy services gain ground; financial services remains the largest client sector.



Source: AEC

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Training

Consultancy firms invest more than three times the Spanish average in staff training.

2.8%
of revenue

Innovation

The industry invests 2.8% of revenue in innovation, over twice the Spanish average.

Executive Summary

Sustained growth

In 2018, revenue in the industry rose by 5.9% to €13,714 million. This upward trend has remained constant over recent years and a further 5.3% increase is forecast for 2019. Once again, growth rates in consultancy have outstripped GDP.

Consistent job creation

During 2018, the industry's net workforce rose by 9.4% to nearly 186,000. The increase in employment has remained consistent since 2004, when this annual report was first published. The industry generates high-quality, knowledge-intensive employment; 68% of staff have completed higher education, of whom 67% have STEM degrees.

Most highly valued skills: learning capacity, teamwork and results-orientation

The survey shows that the most highly valued soft skills are capacity for learning; teamwork; results-oriented approach; customer-orientation; initiative and proactivity; flexibility and adaptation to new situations; and capacity for effective communication, in that order.

Consultancy services continue to grow

The area of strongest growth in 2018 was consultancy services (up 14%), which now accounts for 24.4% of total revenue. Demand for this type of service has risen as companies undertake digital transformation of their business.

Demand for services is being led by the financial services sector

The industry's largest client sector in 2018 was financial services, which accounted for 34% of all revenue, followed by Government (17.6%); energy & utilities (13.8%); and telecommunications & media, 12.1%.

From big data & analytics to artificial intelligence

According to our survey, the technology playing the most significant role in members' projects during the year was big data & analytics. However, they predict that over the next five years, the top spot will be taken by artificial intelligence, followed by big data & analytics, cybersecurity and service automation.

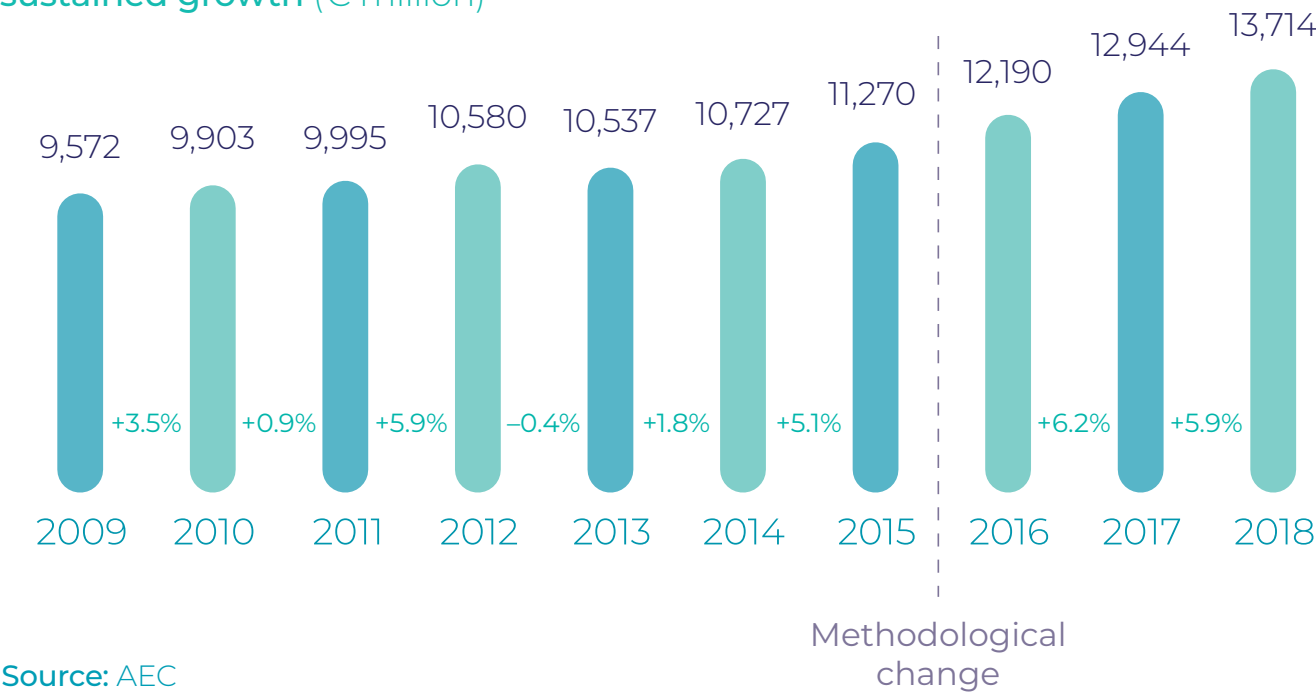
Innovation, an Essential Part of Consultancy's DNA

In 2018, the consultancy industry invested 2.8% of income in innovation, above the European average and more than twice the rate for Spain as a whole. More than 60% of staff training hours were given over to advanced technologies.

Revenue of the consultancy industry

The industry's total revenue for 2018 came to nearly €13,714 million, 5.9% up on 2017 and slightly above forecasts made a year ago. These figures reflect the strength of the industry in recent years, especially since 2014 when there has been sustained growth of over 5%.

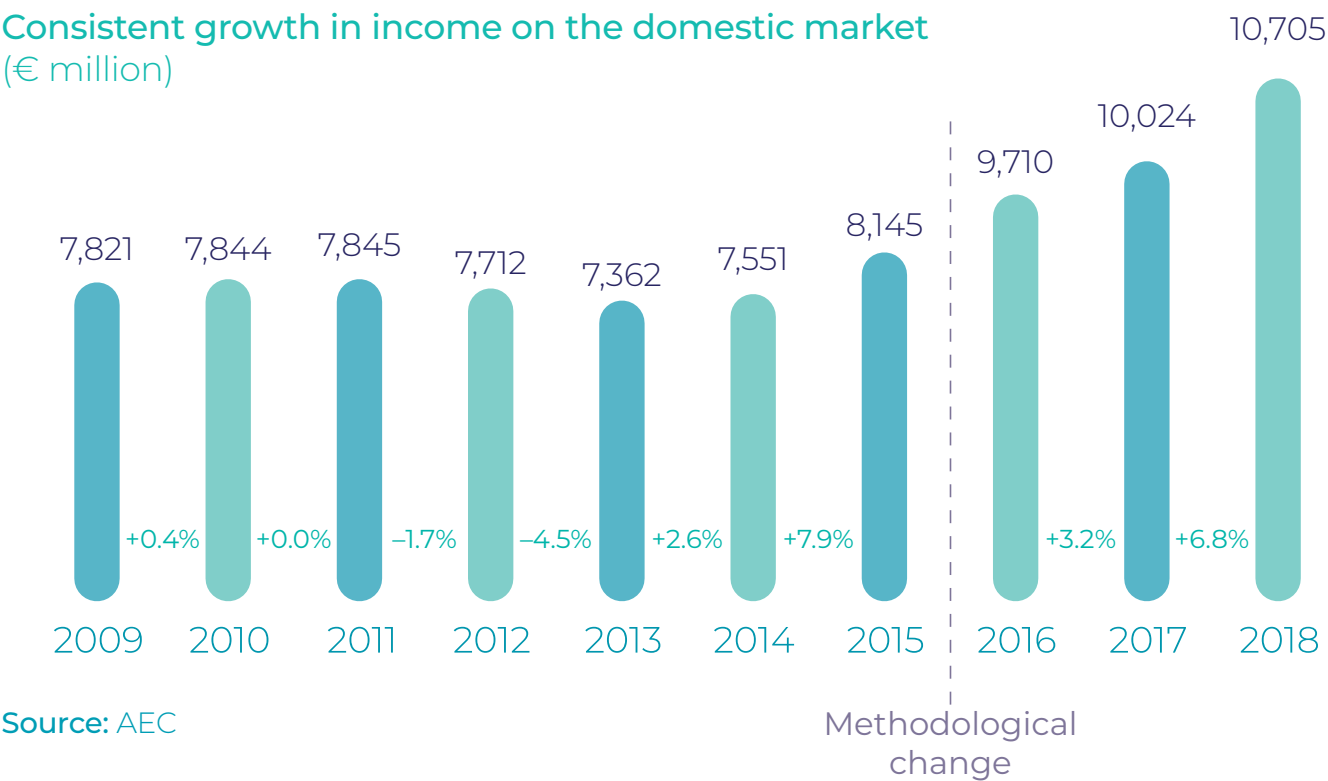
The consultancy industry is experiencing sustained growth (€ million)



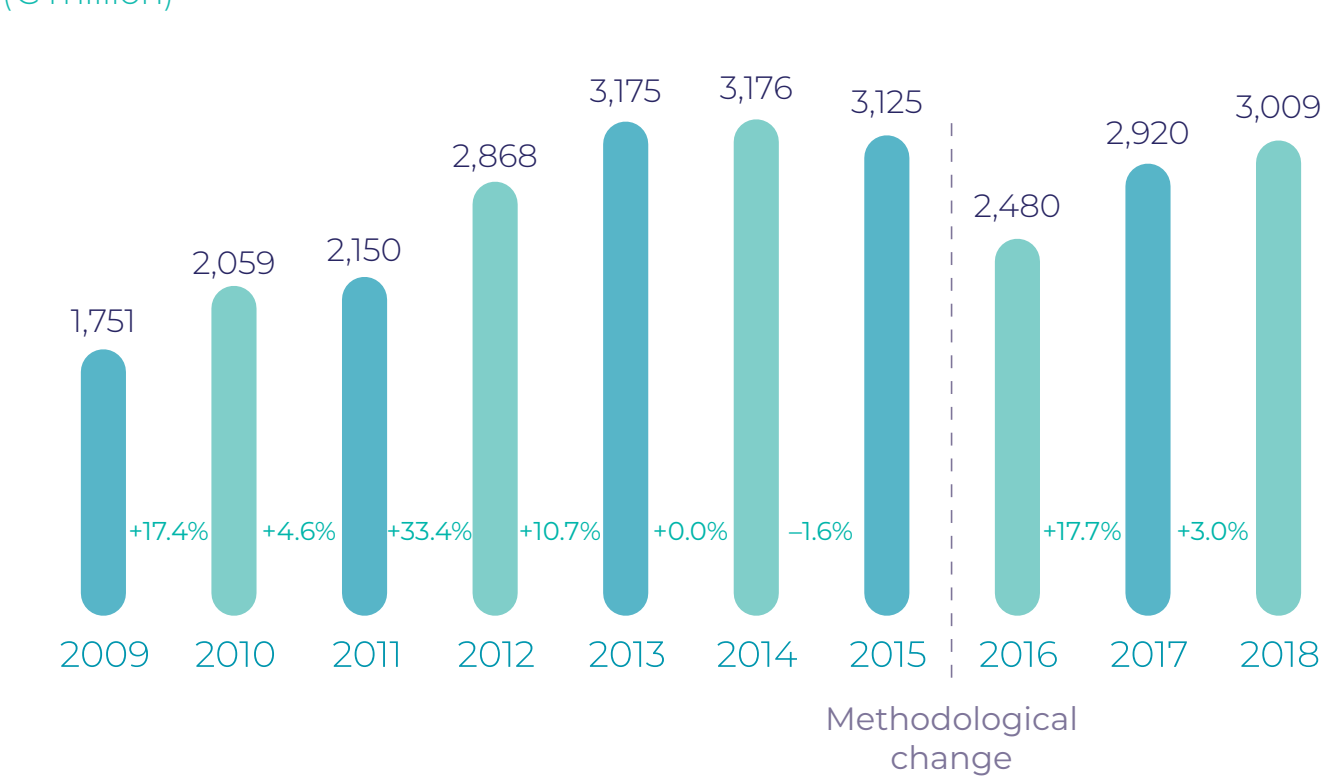
Revenue on the domestic market came to over €10,705 million in 2018

Growth in 2018 was driven by a strong increase in income on the domestic market (up 6.8% to €10,705 million) and a more moderate rise in sales on overseas markets (up 3% to €3,009 million).

Consistent growth in income on the domestic market (€ million)



Moderate growth in sales on the overseas market (€ million)



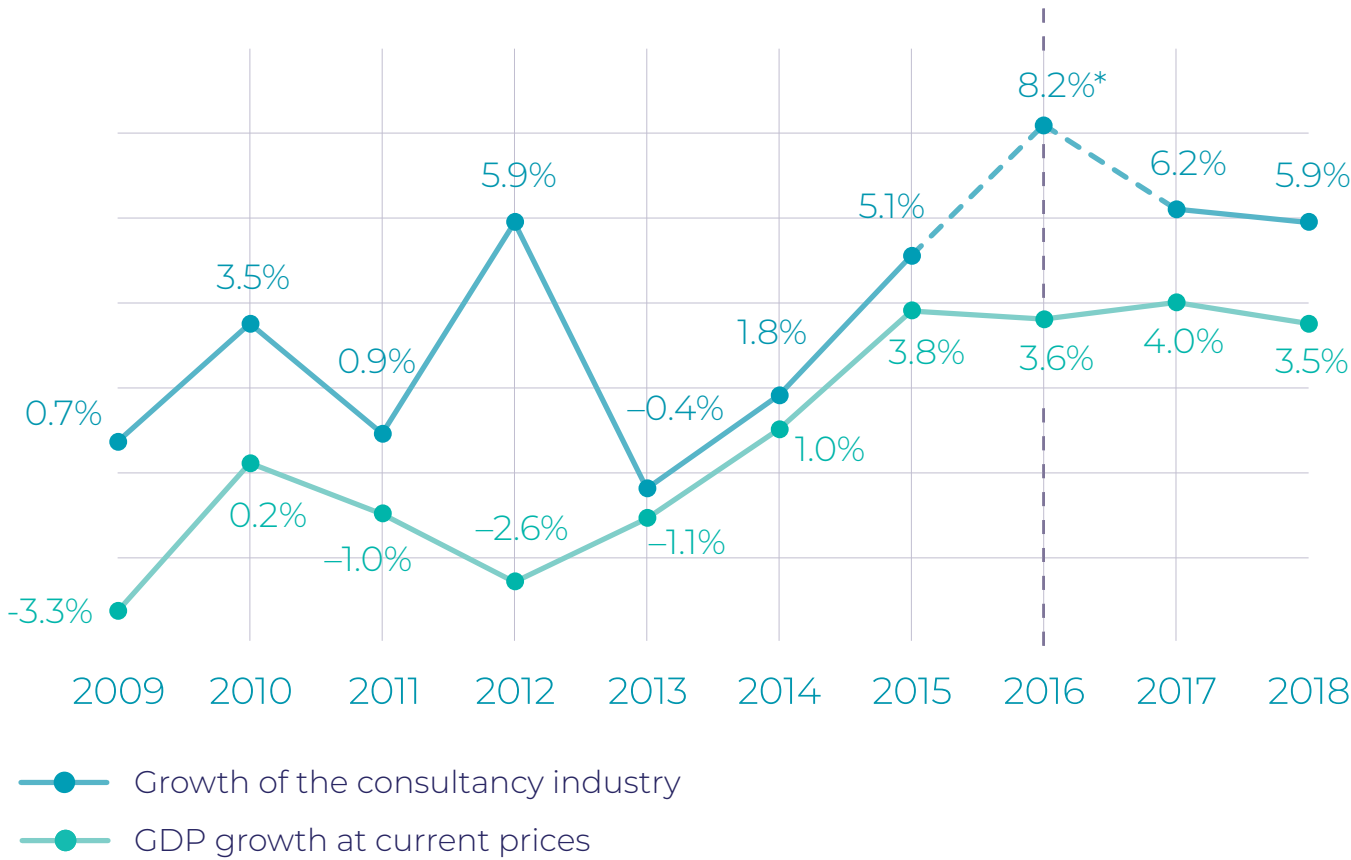
For several years, organisations from all sectors have been engaged in digital transformation processes, in which new technologies play an indispensable role.

This accelerated process of change requires not only the integration of new technologies, but also a root-and-branch transformation of business models. To face this challenge, organisations require the knowledge and experience consultancy

Revenue up 5.9%
in 2018

firms can offer to adapt swiftly and efficiently to the new scenario.

Revenue for the consultancy industry outstrips GDP (2009-2018)



Sources: revenue in the consultancy industry, AEC; GDP at current prices, INE (Contabilidad Nacional de España, base 2010, and Contabilidad Nacional Trimestral de España, base 2010).

Structurally the industry has grown ahead of Spanish GDP growth. In simple terms, this means that over the years, consultancy has contributed more than the average to the creation of national

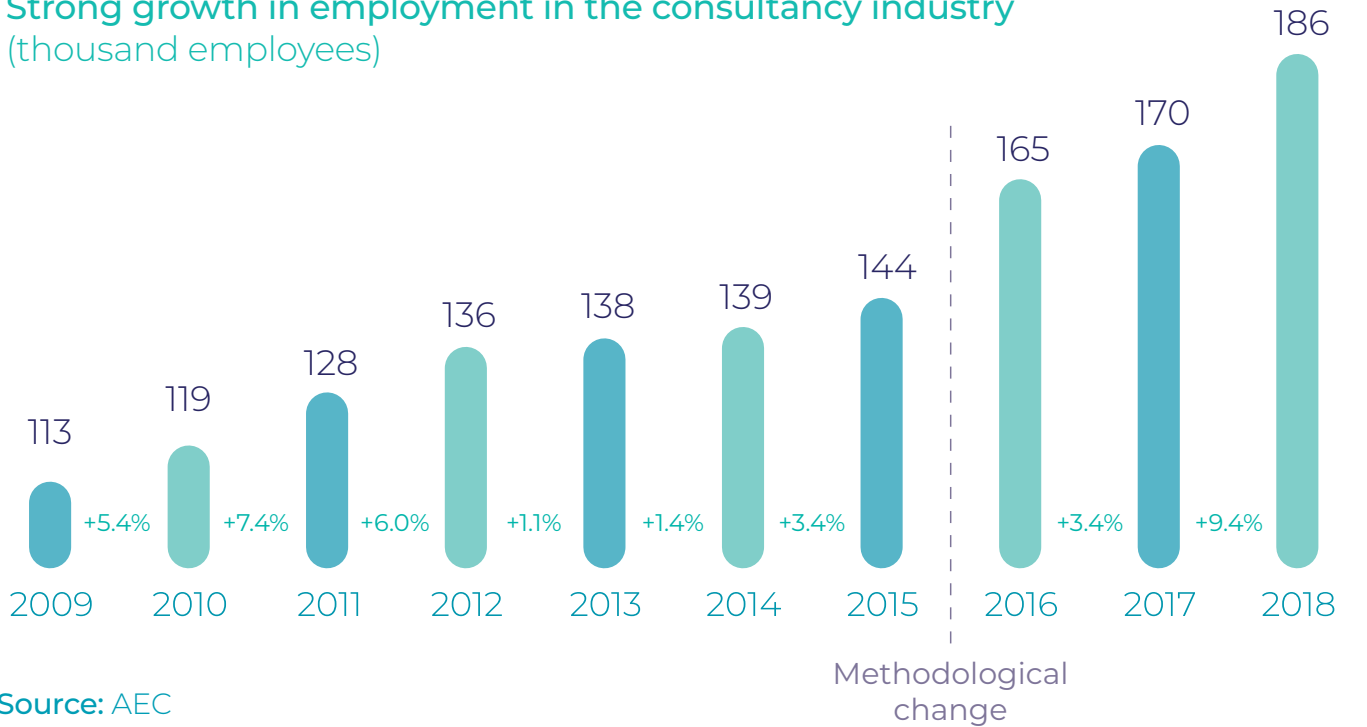
wealth. In 2018, growth in the industry was two percentage points higher than nominal GDP growth.

*Methodological change

Employment in the consultancy industry

In 2018, the consultancy industry employed 186,000 people, an increase of around 16,000 (9.4%) on 2017. This trend has continued unchecked since 2009.

Strong growth in employment in the consultancy industry (thousand employees)



Source: AEC

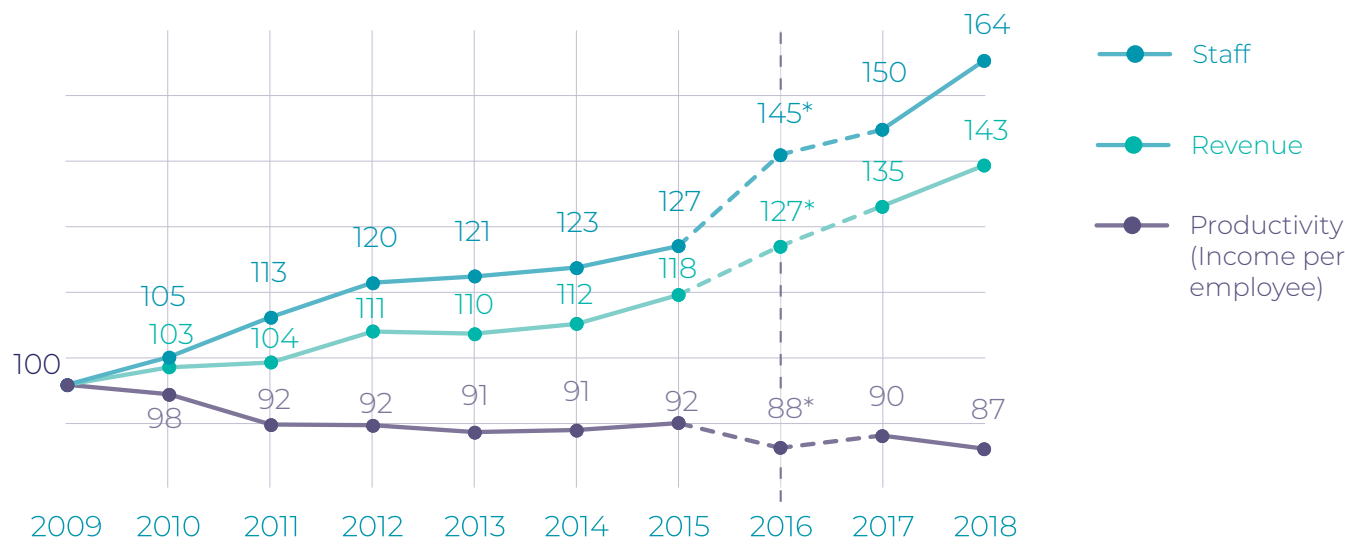
The industry's most important asset is its human capital and promoting specialist high-added-value training helps retain talent. The effort we have made over the years—even during the financial crisis—to retain and upskill staff, combined with our constant recruitment of specialist young talent, has been key to ensuring that our clients can face the new challenges of the digital economy.

Consultancy firms are characterised by their innovation, dynamism and competitiveness and also by their highly skilled human capital; they are one of the leading sources of high-quality staff for the Spanish economy as a whole.

In 2018, staff levels rose ahead of revenue, resulting in a slight drop in sales per employee. This apparent decline in productivity replicates the trend of recent years and is essentially due to increased pressure on prices, with a resulting fall in profit margins. Nonetheless, it has not stopped the industry from investing in new talent.

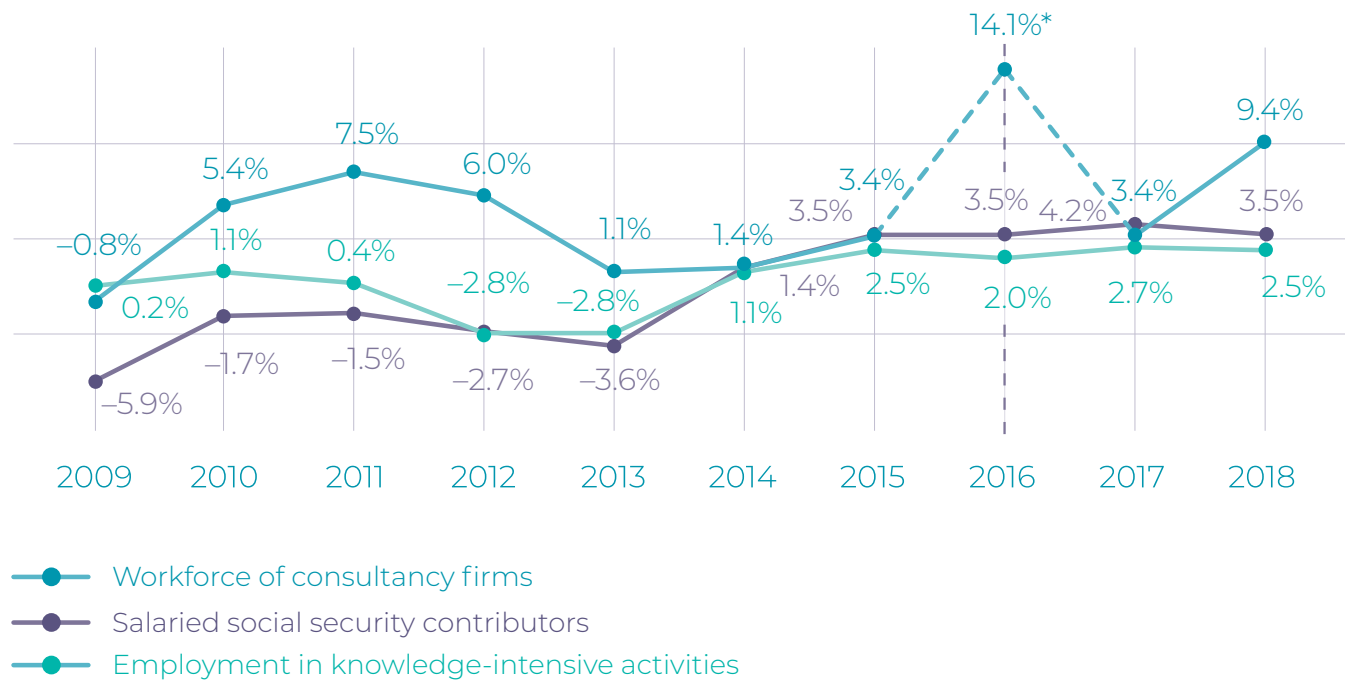
Employment up 9.4%
on 2017

Workforce, revenue and productivity (Revenue per employee)
(index: 2009 = 100)



Source: AEC

Growth rate in workforce of consultancy firms, salaried employees in Spain and employment in knowledge-intensive activities in Spain (2009-2018)



Sources: workforce of consultancy firms, AEC; salaried social security contributors in Spain, Annual Statistics of the Ministry for Employment and Social Security; employment in knowledge-intensive activities, Eurostat.

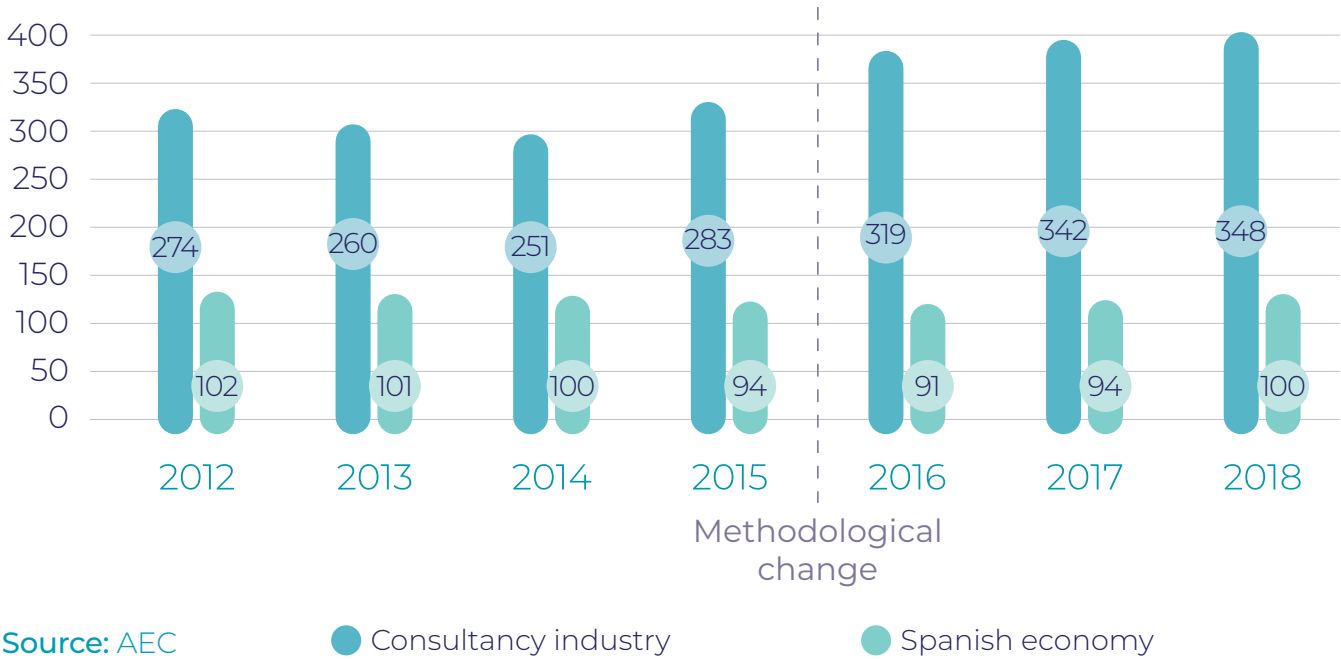
*Methodological change

By the very nature of their business, consultancy firms tend to select the most qualified staff on the labour market. Most recruits (nearly 68%) are university graduates. This is a much higher rate than the average for the Spanish economy as a whole and makes the industry a leading employer of young graduates with STEM profiles, accounting for more than 67% of all graduate recruits in the industry. STEM degrees are of key importance in an economy in which all organisations are to some extent engaged in digital transformation processes. Nonetheless, consultancy firms also

require professionals with other science and humanities qualifications.

68% of employees are university graduates and of these, more than 67% have STEM profiles

Increase in spending on training per employee in consultancy (€)



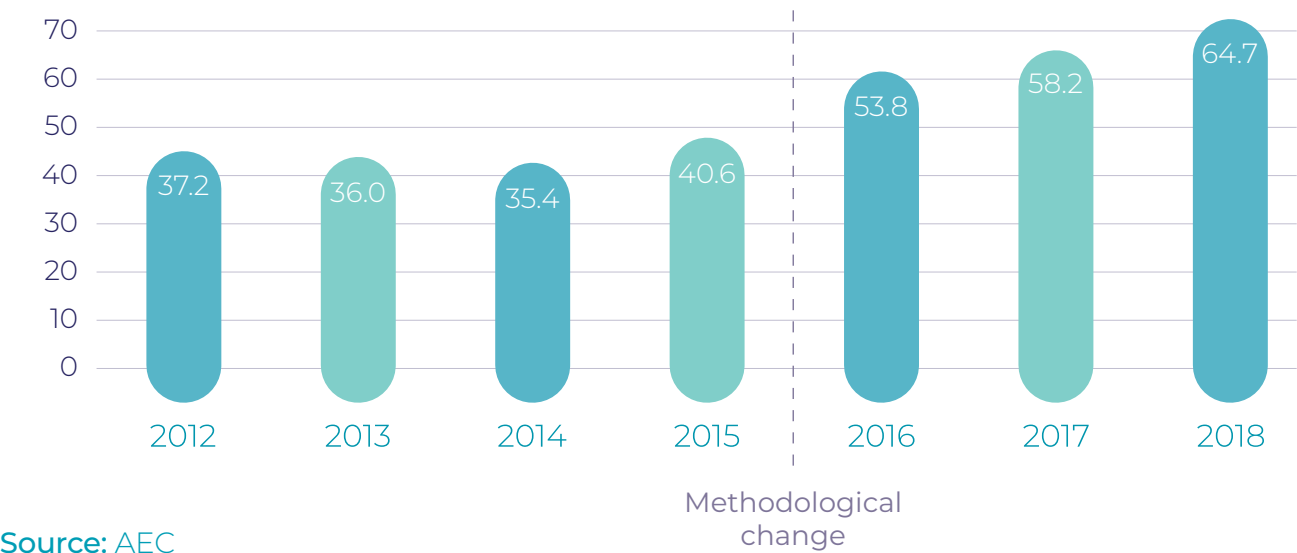
Source: AEC

Consultancy firms invest 3.5 times the Spanish average in ongoing staff training

The industry has always been aware of the importance of investing in training in order to upskill staff and keep their knowledge up to date, especially in technology-related areas.

Throughout 2018, the industry invested more than €64 million in training, 11% more than in 2017. This represents an average of €348 per employee, very significantly higher than the Spanish average of around €100.

Increase in total spending on training (€ million)



Source: AEC

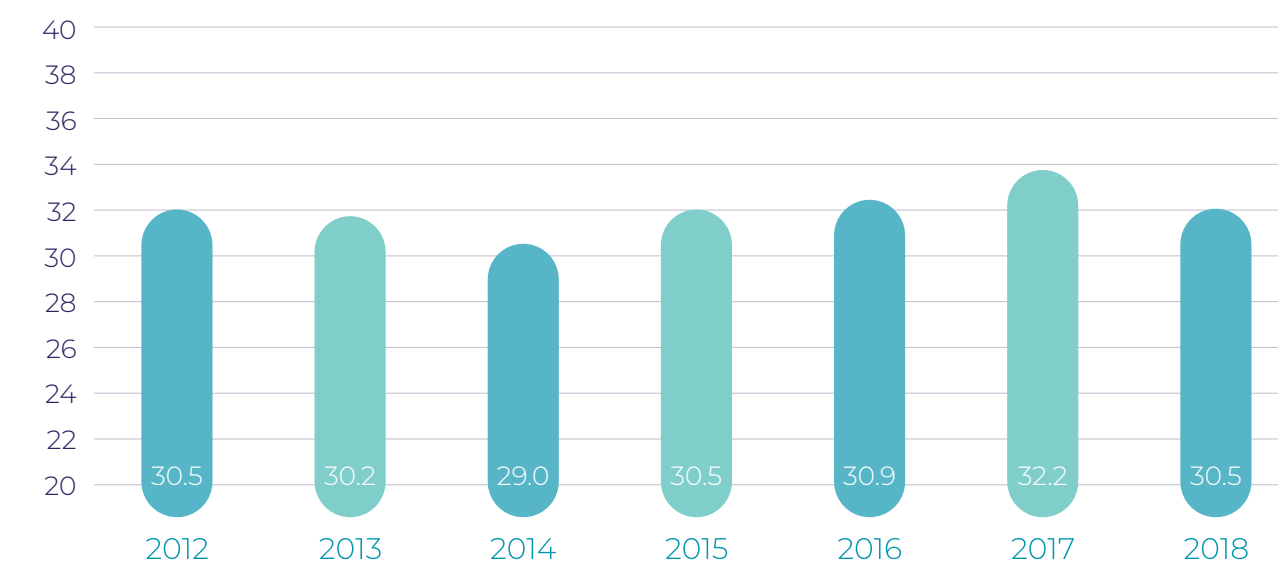
On average, the industry invested around 30.5 hours of training in each employee, maintaining the trend of recent years. Increasingly, training in consultancy firms is concentrated on technologies such as big data & analytics, cloud computing and cybersecurity, although attention is also paid to relational and human skills.

Between organic growth and natural turnover, consultancy firms hired more than 51,000 new staff in 2018, equivalent to 27.4% of the total workforce. More than 45% of these new recruits were recent graduates with no previous work experience (not taking into account interns and people hired

through agreements with educational institutions). These figures reflect not only the industry's capacity to create jobs but also its role as a gateway to the labour market for young graduates, to whom it offers the best opportunities for a professional career.

When hiring new recruits, as well as looking for technical knowledge, qualifications and experience, companies also value a series of complementary and added-value personal skills, which are essential for many consultancy projects. The five most highly valued skills were capacity for learning; teamwork; results-oriented approach (in terms of capacity to

Long term stability in number of training hours per employee



Source: AEC

Need for greater adaptation of candidates' skills to market demands



Source: AEC

assume responsibilities and challenges); customer-orientation; and initiative and proactivity. The table above gives a complete list of skills valued by the market and shows how companies scored each one in terms of importance and the extent to which candidates actually possess these skills and the differential between the two figures.

While the figures indicate that candidates generally meet market requirements, there is still considerable room for improvement in matching

these skills to companies' real needs. These results should encourage a debate on the degree to which today's education system has adapted to the industry's real requirements. They should be seen by educational institutions as an indication on how to adjust the content, methodologies and processes of their courses, and should guide future professionals on how to adapt their training to market expectations.

Distribution of services

Consultancy firms offer their clients three types of service: consultancy services, development & integration and outsourcing. In 2018, consultancy services accounted for 24.4% of all income; development & integration, 24.7%; and outsourcing, 50.9%

The relative contribution of these services to total revenue has varied over the years. Consultancy services have gone from representing 19% of the industry's total income in 2009 to 24.4% in 2018. During the same period, the revenue share of outsourcing has risen from 39% to 50.9%. In contrast, the contribution of development and integration services has fallen from 42% in 2009 to 24.7% in 2018.

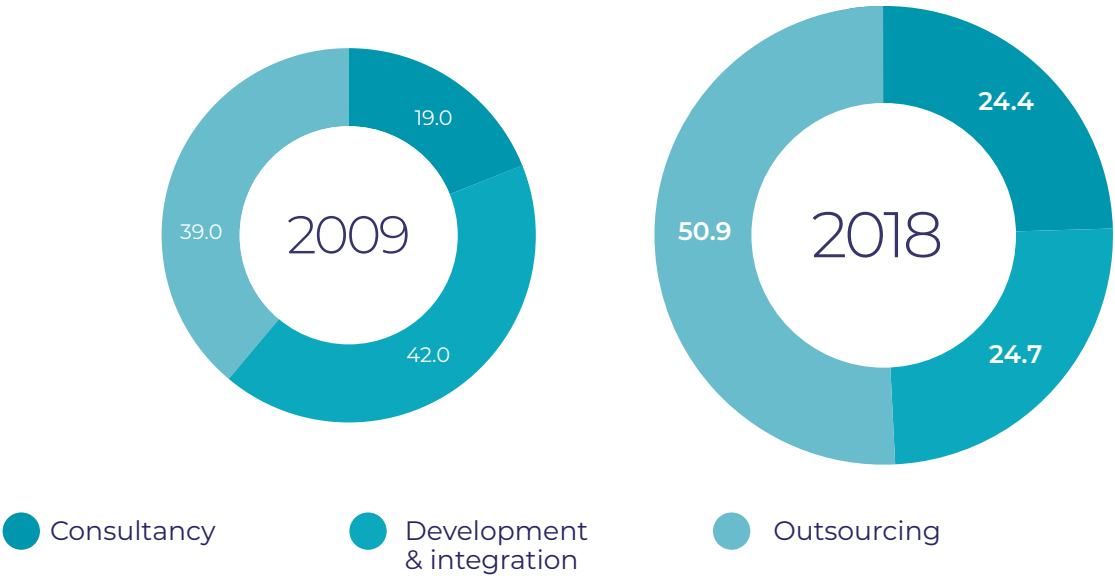
Consultancy services have performed unevenly over the last decade. Between 2009 and 2012, at the height of the financial crisis, their contribution declined steadily to 16%. Since then, there has been a steady rise and in 2018, they accounted for a 24.4% share of revenue. Over the year, total income from these services grew by 14% from €2,925 million to €3,347 million.

Outsourcing services continued to grow. In 2018, they accounted for 50.9% of business, showing an annual average growth rate of 7.4% between 2009 and 2018. Once again, there is an increasing tendency for companies to outsource non-core activities that can be carried out more effectively by other more specialised companies. Income from outsourcing in grew by 8% last year, from €6,446 million to €6,981 million.

The relative importance of development and integration services has gradually declined from a 42% revenue share in 2009 to 24.7% in 2018. Over the last year, income from this area fell by 5%, from €3,573 million to €3,388 million.

Consultancy services have grown by 14% on 2017

Growth in consultancy services and outsourcing in recent years (percentage)



Distribution of revenue by client sector

The digital transformation is impacting all sectors of the economy. However, the rate of adaptation and investment in technology varies from sector to sector, and this is reflected in their relative demand for consultancy.

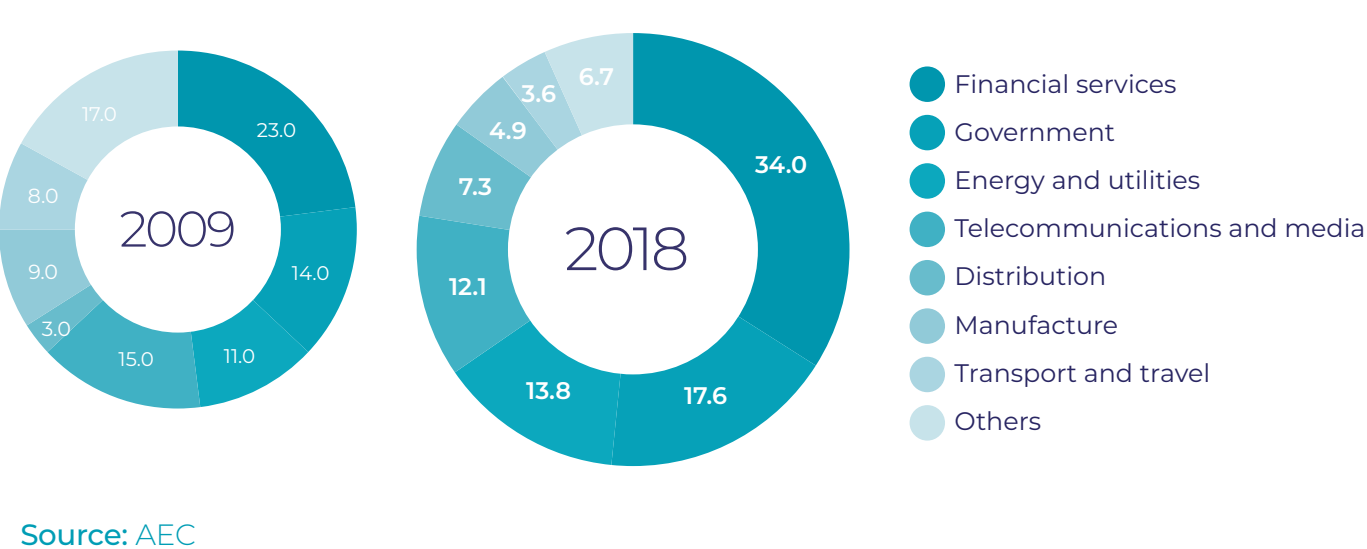
In 2018, the highest demand for consultancy projects came from the financial services sector, with total sales up 8.5% to €4,663 million, accounting for 34% of the industry's total income. Government, with sales of €2,414 million, continues to be another of the industry's most important clients (despite a minor drop compared to the 2017 total) and accounted for 17.6% of total income in 2018. In third place came the energy and utilities sector (oil, water, gas, mining, etc.), with sales of €1,893 million, 13.8% of the total. This was followed by telecommunications and media, with €1,659 million of sales (12.1% of the total). Together, these four sectors make up 77.5% (€10,630 million) of the consultancy industry's total income. The remaining 22.5% is divided up among the following sectors:

distribution, 7.3%; manufacturing, 4.9%; transport, 3.6%; others, 6.7%.

Of the industry's major clients, the financial services industry has shown the best trend throughout recent years, acting as a driving force for growth in Spanish consultancy. Since 2009, its relative contribution to total income has increased steadily year on year, from 23% in 2009 to 34% in 2018. Average annual growth since 2009 stands at 8.9%.

Demand from the financial services sector continues to grow and now accounts for 34% of the industry's income

The financial services sector is consistently the industry's strongest client (percentage)

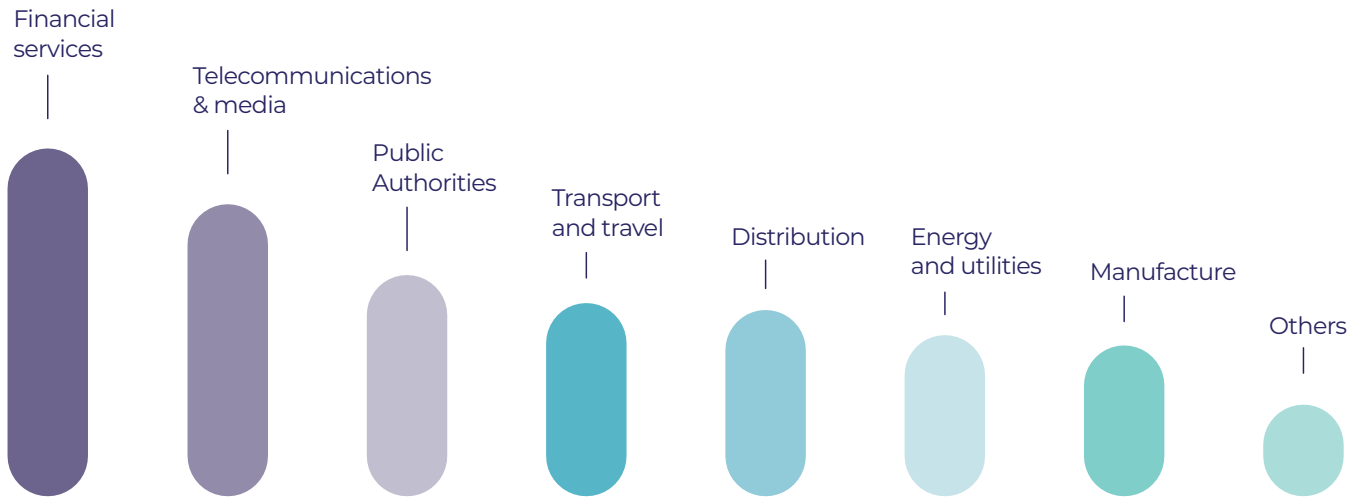


The trend in the government sector has been more uneven. After reaching a peak in demand in 2009, its contribution to total income fell sharply, coinciding with the budgetary cutbacks that affected all tiers of government until 2015. Since 2016, however, there has been an appreciable change in the trend, and it is expected that this renewed growth will be consolidated in coming years as modernisation and digital transformation in the sector gathers pace.

Income from the energy and utilities sectors has grown steadily, with an average annual increase of 7.0% between 2009 and 2018. Indeed, from 2016 on, this growth accelerated, rising to an average annual increase of 14.9%. In relative terms, the sector's contribution to total income has risen from 11% in 2009 to 13.8% in 2018.

The performance of the telecommunications and media sector has been irregular in recent years, and its share of total income has fallen from 15% in 2009 to 12.1% in 2018.

Relative digitisation of different industries as compared to financial services



Source: AEC

From the perspective of the consultancy industry, the rate of digitisation of different sectors of the economy varies considerably. In the survey, 78% of respondents considered that financial services was the most digitised sector. This was closely followed by telecommunications and media, which also has a high degree of digitisation, with other sectors a considerable way behind, in the following order: distribution, transport, government, manufacture, energy & utilities and others.

As the graph shows, companies from other sectors still have a long way to go to catch up with the financial services industry in this regard.

It is particularly worth noting the position of the "Others" section, which includes industries such as tourism, leisure and construction, all of which make a very important contribution to Spanish GDP, and yet currently lag behind significantly when it comes to digitisation.

Forecast earnings for 2019

The forecasts for 2019 are for a 5.3% growth in revenue to €14,441 million, in line with the trend for recent years.

In terms of revenue distribution, respondents predict that financial services will continue to be the industry's largest client, followed by government, energy & utilities and, in fourth place, telecommunications & media. No major changes are predicted in other sectors.

The industry is forecast to grow by 5.3% in 2019

Innovation, an Essential Part of the Industry's DNA

Innovation is an essential factor for companies and economies wishing to address present and future challenges. For the first time the year, our study details investment in innovation. The results show that the consultancy industry—which has always guided other client sectors through their processes of transformation—is well aware of the importance of this factor.

In 2018, the industry spent 2.8% of income (over €380 million) on internal innovation. This compares favourably to the rate of investment in innovation in Spain (1.2% of GDP in 2017), and in Europe as a whole (2.07%).

However, innovation takes place not only within our firms, but also in the projects they perform, and 12.1% of our employees are engaged in clients' innovation projects.

To put it another way, around 30% of projects carried out by Spanish consultancy firms in 2018 involved entirely new and innovative technologies, such as cloud computing, big data & analytics, mobility devices in social media, the Internet of Things (IoT), artificial intelligence, automation of human work and blockchain, and other innovative methodologies such as Agile, Design Thinking and Lean.

Of these, the study shows that big data & analytics, cybersecurity, automation & robotization, and cloud computing are the technologies that have had the greatest impact in 2018 in transforming the processes and business models of organisations.

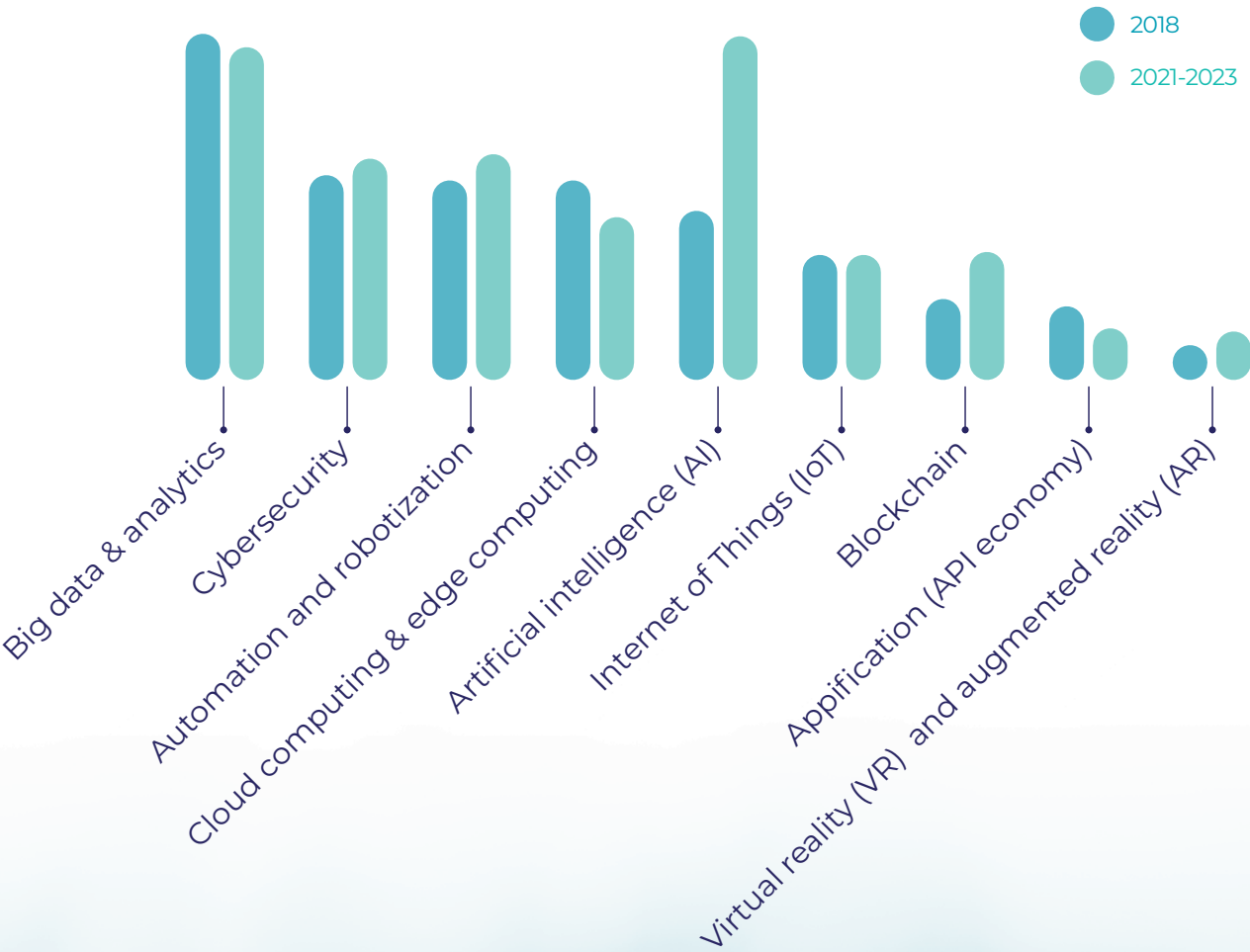
Implementing these technologies requires a high rate of knowledge and specialisation, qualities that businesses and public authorities often lack, and which consultancy firms can provide. Consultancy firms devote 60% of total training hours to these technologies.

At the same time, the technologies themselves are evolving very quickly. Respondents to the survey stated that in a period of three to four years, artificial intelligence—which to date has played only a secondary role—will become the number one technology they provide in their projects.

These figures highlight the importance of innovation. Furthermore, together with the rest of the study, and particularly the strong commitment to training, they show that the industry is firmly determined to lead the pack and have the best specialist human capital to address the challenges of the digital transformation and the demands of the new economy.

Consultancy firms invest 2.8% of their income in innovation, as compared to a Spanish average in 2017 of 1.2% and a European average of 2.07%.

Use of new technologies in services offered by consultancy firms



Source: AEC

Forum



INNOVATION AS A DRIVING FORCE IN AN ERA OF STRUCTURAL TRANSFORMATIONS

Innovation is an undisputed part of the DNA of our business. This places us at the forefront of the economy in terms of added value, productivity and generation of high-quality employment. While the industry's figures speak for themselves, I would particularly like to draw attention to the driving effect this has on society as a whole. The essential mission of consultancy firms is to promote competitiveness, technological leadership and the transformation of the social and economic fabric. This role is especially important in knowledge-based economies and very necessary in this period of structural change resulting from the digital transformation.

Fernando Abril-Martorell
President, Indra



AN ECOSYSTEM THAT TRANSFORMS BUSINESS

As strategic partners to our clients, our role is to respond to their business needs through innovation and pragmatic management of disruption. We play a key part in helping companies to analyse and anticipate opportunities and in supporting government bodies that are seeking to use digitisation to offer citizens more accessible and efficient services. We work openly in collaboration with our clients, partners and universities, generating an ecosystem of innovation that enables companies to make strategic decisions that will transform their business and improve their competitiveness. In doing so, we can offer our differential talent, which we recruit and develop, together with innovative solutions that will generate value for companies, the economy and society at large.

Fritz Hoderlein
CEO, Everis



INNOVATE TO LIVE

The consultancy industry is a source of innovation, digital disruption and high-quality employment. In the last two years, Accenture has launched its Architecture of Innovation and opened the Liquid Studio in Madrid (which concentrates on focusing on agile technological developments) to complement the existing Digital Hub. We recently opened our Industry X.0 Centre in Bilbao and an Advanced Technology Centre in Alicante. We continue to work closely with public and private innovation ecosystems, encompassing the capacities of more than 500 Spanish start-ups. We also collaborate with universities and promote professional training in new technologies. We are working to extend the employability of our country in the new digital era and improve business ethics and data security.

Juan Pedro Moreno
President of Accenture Spain, Portugal and Israel.



OPEN AND APPLIED INNOVATION TO OBTAIN TANGIBLE RESULTS

Applied innovation, focused on producing tangible business results, is an indispensable prerequisite for operating on an ever more complex and vibrant market. The consultancy industry is clearly a driving force for innovation in the Spanish business sector, both because of its cross-cutting vision of the different industries (the boundaries between which are becoming increasingly blurred), and as a gateway for innovation imported from other parts of the world. Innovation undisputedly brings value, provided that it focuses on real business targets and is open to ecosystems of partners, start-ups, universities, etc. For any organisation to fail to undertake innovation projects with a major degree of digital transformation, would signify a clear backward step in terms of competitiveness.

Francisco Bermúdez
CEO, Capgemini Spain



INNOVATION IS NO LONGER OPTIONAL

Companies that incorporate innovative business and technological solutions can position themselves ahead of the market and their competitors, achieving strong returns on their investments. Consultancy firms need to continue spearheading the move towards the introduction of innovative new processes and disruptive technologies in organisations. We must also keep reinventing ourselves to face the new challenges facing our clients, staff and society at large. Innovation is a continuous process that need to be incorporated naturally, providing companies with the definitive edge they need to grow and become more competitive and which society needs to ensure a more egalitarian and sustainable model.

José María Pascual
CEO, Viewnext



THE ESSENTIAL ROLE OF THE CONSULTANCY INDUSTRY

As consultants, we are called on to address change; because we undertake projects of transformation our teams need to possess the skills to innovate. Perhaps more than ever before, the business sector needs to review its offer continuously; often, companies turn to us for advice on evolving towards new business models. This is innovation. In particular, these processes are being driven by digital transformation. In this context, I believe that the consultancy industry plays an essential role. On each project, our specially selected and trained staff assess the situation and then seek new alternatives, new ways of doing things that will improve efficiency, product quality, customers, markets, etc. And this nearly always involves innovation.

José Ramón Magarzo
CEO, Altran Spain



OUR CONTRIBUTION TO GENERATING DIGITAL TALENT IN SPAIN

In an environment of constant change and evolution, we provide solutions for both the way organisations operate and the transformation-related challenges that face them, seeking to make them more efficient and better adapted to new habits and customs among the wider public. We adapt to the demands of a society that is increasingly founded on technology. At Sopra Steria, we provide innovative solutions for all areas of the Spanish business world, but particularly the financial services sector. We continue to believe that people are the chief protagonists of change. Our job is to ensure that innovation and new technologies form part of our staff's everyday work through our continuous educational programmes.

Antonio Peñalver
CEO, Sopra Steria Spain



COLLABORATION WILL BE THE KEY TOOL IN VALUE CREATION

In the current context in all sectors of the economy and the redesign of economic models emerging in new ecosystems, there is no one way of resolving all the situations we will have to face in the medium term. Any innovation strategy must be capable of facing uncertainty and the need to make decisions without being able to fully weigh up and evaluate all possible impacts including overlap with existing models. In this new environment, collaboration will enable consultancy firms to be flexible and respond to these challenges. Collaboration represents a revolution in value creation and is the keystone for bringing together diverse ideas, technologies, providers and businesses.

Juan Parra
CEO, DXC Technology in Spain and Portugal



THE DIGITAL TRANSFORMATION REQUIRES A CHANGE IN ATTITUDE AND OPERATING MODEL

The current digital transformation requires a change in attitude and operating model in all organisations, public and private alike. This means evolving and redesigning processes to align them with data, incorporating connectivity and intelligence into the products we manufacture, and developing new services that can handle these data and accompany the products and solutions that different organisations provide. In order to navigate this complex path of digital transformation, AEC's member firms, with their knowledge and their experience in applying the most innovative available technology, are the best partners for different sectors of business and government.

Carlos Muñoz
Executive VP Iberia & LatAm, Gfi Group



INNOVATION AS A DRIVING FORCER BEHIND SOCIAL PROGRESS

Staff in the consultancy area of the IT industry work to ensure that innovation becomes an important part of the culture of our society. To this end, we work with our clients to achieve their goals, which can broadly be divided into two groups: private innovation which mainly serves to differentiate companies from the competition and public innovation, which seeks to advance towards greater efficiency and transparency in the way government interacts with citizens. In short, we advance together, exploring new solutions.

Luis Furnells
CEO, Oesía Group



IN A SCENARIO OF CONSTANT CHANGE, CONSULTANCY FIRMS MUST BRING VALUE TO OUR CLIENTS' MOST COMPLEX CHALLENGES

In the new business context, we have committed to a model of consultancy based on high value-added services. Our goal is to help our clients and contribute value in their most complex challenges, training leaders who will transform their organisations through new strategies. In this scenario, our commitment to innovation enables organisations to grow profitably and efficiently in areas where they can stand out and create competitive advantage. In a world in constant evolution and transformation, where it is critically important to be able to adapt, we rely on a people-based model. To this end, we recruit the best talent for our teams, which enjoy a high level of specialised and multidisciplinary expertise.

Héctor Flórez
Consulting Managing Partner, Deloitte Spain



CONSULTANCY: KEY TO BUSINESS INNOVATION

Innovation is an essential element for raising the competitiveness of our public and private organisations, whatever their area of activity. The success of any innovation initiative lies in its potential to resolve needs in a way that will impact the market. Consultancy firms can provide clients with an eminently practical approach to innovation, with our characteristic independence and technological and sectorial knowledge. And through the impetus and leadership of open innovation ecosystems, in which we collaborate with our clients, partners and employees with different visions and cultures, we promote the value of ideas to turn them into a successful reality.

Emilio Gil Domínguez-Blanco
CEO, IECISA



WORKING TOWARDS THE COGNITIVE COMPANY: TRAVELLING IN THE HYBRID CLOUD

We are facing a crucial moment where a combination of different technologies—such as artificial intelligence, automation, IoT, blockchain and 5G—is leading to a new generation of business models and a more flexible business culture, in which talent and people are the main source of value creation.

Today companies need to capture the real value of the digital transformation we first embarked on a decade ago. We start this journey towards what we call the cognitive company by identifying the real source of competitive advantage and the skills that are needed to meet the challenge, the best vehicle in which to set out on this journey is a secure and open multicloud hybrid infrastructure.

Isabel Gómez Cagigas
General Manager for Spain, Portugal, Greece and Israel,
IBM Global Business Services



A CROSS-CUTTING APPROACH TO ICT

Technology continues to be the gateway for competitiveness in all industries. Over the last few decades, we have seen an unprecedented advance in business processes and models. Now, however, we have taken a major step forward and technological consultancy has become a keystone in this process. The developments we introduce form part of people's everyday lives; through innovation we are building a new economy and a new society. At Ayesa we are well aware of the cross-sectoral nature of ICT, because our business model is very closely related to bringing intelligence to the infrastructures required by an advanced and connected world.

Arancha Manzanares
Vicepresident, Ayesa



TECHNOLOGY AS A MOTOR OF INNOVATION

Our role as technology consultancy firms is to act as a bridge between the huge potential of technology and the benefits it can offer our clients. To achieve this goal, we need to be familiar with the latest technologies and invest in human resources and technological assets. In recent years we have successfully acquired a number of computing centres in Europe and companies with specific technology and knowledge in different fields, focusing particularly on the areas of health and healthcare. However, each client requires a specific solution, and our job is to innovate with them to ensure that every solution makes their business stand out, allowing them to be more competitive and differential in a world of global markets.

Oriol Ruiz
Managing Director, Getronics Iberia



INNOVATION, CHALLENGE AND OPPORTUNITY

The game rules for being competitive in business are changing. Reimagined products and services, combined with the emergence of technology have disrupted traditional models. Successful companies are the ones that are innovative, flexible and digital; they have the necessary talent and in some cases they look beyond financial objectives. Innovating and being quick to respond are essential and that trend is set to last. As consultants, we need to accompany our clients in this process, generating long-term value and giving immediate responses to market demands. Any transformation involves change and creates uncertainties, but those that act quickly will have more opportunities than those who react slowly and do not adapt in time.

Ignacio Rel
Managing Partner, Advisory Services, EY Spain



COGNITIVE DATA MANAGEMENT, THE PARADIGM OF TRANSFORMATION

Cognitive Data Management is the paradigm of transformation. We need to look to the future from the perspective of a new model, based on two foundations: knowledge of the present and prediction of the future. In this new digital economy, the notion of "data" is enormously significant. Data means placing the customer and employee at the centre of all business decisions. Data means understanding their present in order to generate predictive models that will lead us to a successful future. Data means working with a cognitive philosophy. A new strategic model can enable this analytical universe to operate like a living organism.

Joan Cardona
CEO Managing Partner, Atmira



TALENT, A KEY ASPECT IN TRANSFORMATION OF THE ECONOMY

The consultancy industry is characterised by two key features: innovation and talent. Above all, ours is a transformative industry; we work to transform business and the economy and our constant search for innovative solutions for our clients makes us an essential player in the wider progress of society. Moreover, we are a vast breeding ground of talent. Indeed, many of Spain's top executives received their first training in our industry.

Francisco Javier Latasa
President, VASS Group



CONSULTANCY, BRINGING VALUE TO NEW CHALLENGES

Consultancy is a strategic lever for companies' innovation and competitiveness. It is built on helping clients to make decisions and choose the most efficient option. For Worldline, investment in innovation is a critical strategic priority, especially in an era of digital transformation. Payments must be fast and secure. We have three centres of excellence to help ensure this goal. Our projects involved innovation in key industries, specialisation in payment methods, consumer credit, loyalty creation and mobility, with shared and differing implications in different geographical areas and business models. These, in short, are projects that help people's lives.

Martín Javier Aranda
CEO, Worldline Iberia



TRANSFORMING THROUGH INNOVATION IN OBJECTIVES

We work to guide our clients through their processes of digital transformation. And although the term has now been used so often that it has begun to lose its true significance, there is still a long road left to travel.

To date, the digital transformation has involved incorporating new technology to help digitise and automate core processes. We think that the great challenge now lies in applying innovation to the creation and design of new products and services that will change the focus of core processes, orienting organisations towards user data and the user experience. This will be our mission in the coming years.

Walter Mattheus Elorza
CEO, Bilbomática



CONSULTANCY FIRMS AS A DRIVING FORCE OF INNOVATION

Whatever sector it belongs to, the challenges faced by any organisation throughout its life cycle, are similar: increasing costs, political and economic uncertainty, changing legal requirements, etc. In this context, continuous innovation is essential to ensure growth and market competitiveness. Consultancy firms offer services that can address these needs, backed by knowledge based on an ideal blend of experience and innovation and made-to-measure strategic skills.

Ana Rubio
CEO, Unisys Spain



ENSURING THE BUSINESS SUCCESS OF THE FUTURE

The business consultancy industry is helping Spanish employers to adapt properly to the vast changes in the twenty-first century economy. As external agents, our organisations can better understand the current situation of each employer and help them securely address the task of business evolution.

Our added value lies in the personalised human approach we bring, helping to unfetter the entrepreneurial spirit of Spanish employers and stimulate ideas and ambitions that will enable our economy to grow. The quality of the decisions they make are essential for innovation, and our consultancy firms can guide them through every step and ensure that each idea is developed and implemented today with an eye to the future, striving for excellence at all times.

Alberto Pijuan Prats
President and CEO, CEDEC

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Note on method: Since 2004, the Spanish Association of Consultancy firms (Asociación Española de Empresas de Consultoría or AEC) has meticulously compiled data from Spanish consultancy firms to offer an annual snapshot of the most important features and trends in the industry. The data used was obtained directly from the firms and official statistics from the Ministry of Employment and Social Security, the National Statistics Institute (INE) and Eurostat.

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