



西班牙数字为西中合作与投资创造新机遇
DIGITAL SPAIN CREATES NEW OPPORTUNITIES FOR INVESTMENT AND COOPERATION BETWEEN SPAIN AND CHINA

数字化是后疫情时代生产模式转型和西班牙经济复苏战略的核心

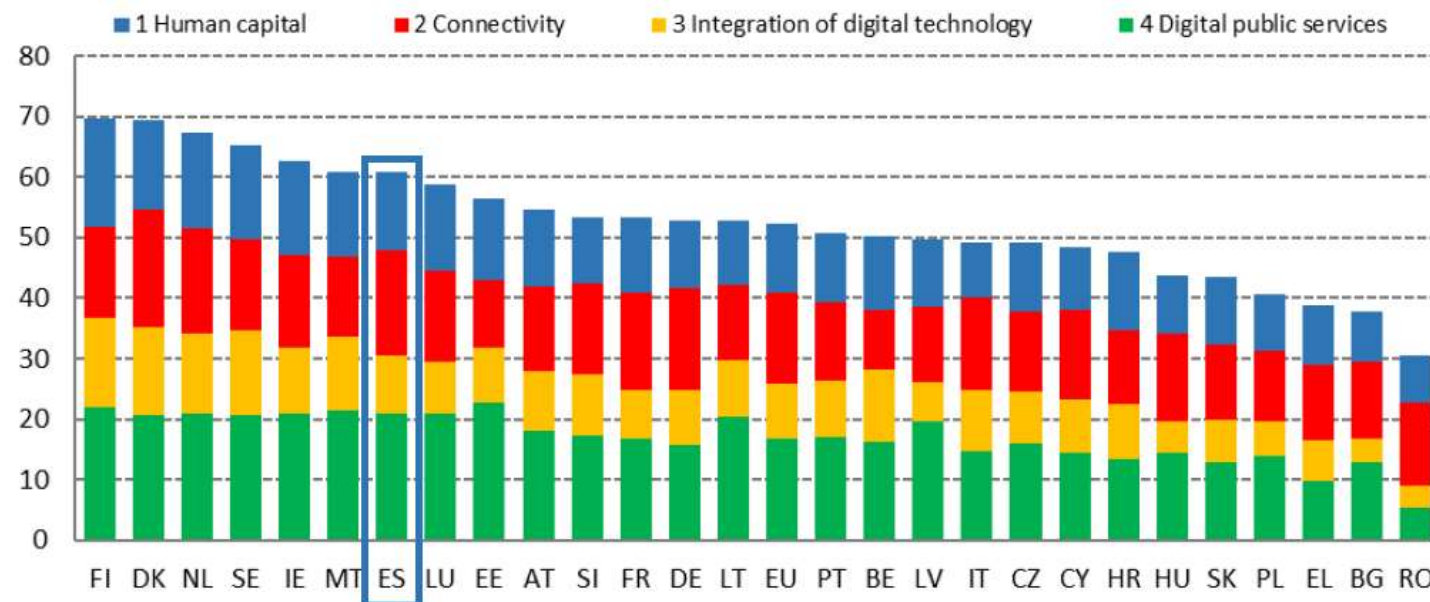
Digitalisation is nucleus of production model transformation and economic recovery strategy in Spain in the post-pandemic era

欧盟2022年数字经济和社会指数报告，西班牙在27个欧盟成员国中排名第七

Spain ranks 7th of 27 EU Member States in the Digital Economy and Society Index 2022

- 西班牙在**互通性**是欧盟的领导者，连续第二年排名第三
Spain is an EU leader in **connectivity** and rank 3rd for the second consecutive year.
- 数字化公共服务排名**第5位**，比2021年高2位
Digital public services ranking 5th, 2 positions above 2021
- 数字技术集成排名第**11位**，比2021年高5位
Integration of digital technology ranking 11th, 5 positions above 2021
- 人力资本排名第**10位**，比2021年高2位
Human capital ranking 10th, 2 positions above 2021

Digital Economy and Society Index (DESI) 2022 ranking



信息和通信技术推动经济发展和现代知识型社会

ICT propels economic development and modern knowledge-based societies

信息与通信技术在西班牙是一个成熟的行业 也是过去十年增长最快的行业之一

ICT is a mature sector in Spain, also was one of the fastest-growing sectors over the last decade

收入

1200亿欧元
2020-2021年增长18.8%

REVENUE

EUR 120 Billion 2019
Increase 18.8% 2020-2021

基础设施

欧盟最大光纤到户网络
160000个移动通信站

INFRASTRUCTURE

1st household fibre network
EU
160,000 mobile base stations

市场规模

4600万消费者
3400万互联网用户

MARKET

46 million consumers
34 million Internet
users

就业

70000家企业
527000个直接岗位

EMPLOYMENT

70.000 companies
527.000 direct Jobs



信息与通信技术基础设施的领导者

Leader in ICT infrastructure

欧盟最大的光纤到户网络
The largest household fiber network in the European Union

85% 的线路连接速度为100 Mbps或更高， 94% 的线路连接速度为30 Mbps或更高
85% of high-speed internet connections of 100 Mbps or + and 94% of 30 Mbps or above.

西班牙超级计算机网络拥有欧洲第5快的大型超级计算机Mare Nostrum
The Spanish Supercomputer Network hosts supercomputer Mare Nostrum, 5th fastest in Europe.

160000个移动通信站和5250万条移动线路
More than 160.000 mobile telecommunications stations and 52.5 million mobile lines.

海底电缆网络将西班牙与欧洲、非洲、亚洲以及美洲相连。Marea是最快的电缆，将西班牙与美国连接在一起。
An undersea cable network connects Spain to Europe, Africa and the American continent. The Marea cable is the fastest in the world and connects Spain to the USA.

Red IRIS网络是连接西班牙研究中心与国际学术网络的大容量光纤网络
Red IRIS: a high-capacity optics network that connects research centers in Spain with international academic networks.



西班牙公司成为世界ICT行业的领军者

Sectors where Spanish companies are global leaders



电信
Telecommunications



运输和国防解决方案
Transport and Defense solutions



管理软件
Landing software



工业和工程解决方案
Industry and Engineering solutions



网络安全
Cybersecurity



土木工程解决方案
Civil engineering solutions



西班牙成为进入1.5亿消费者市场的全球平台

Spain as a global platform to access a market of 150 million consumers

拉丁美洲 (6.38亿)

- 与美国并列成为拉丁美洲地区第一大投资方
- 和区内国家有10项投资保护协议
- 和区内国家有19项避免双重征税协议

Latin America (638 million)

- #1 Investor in Latin America jointly with USA
- 10 Investment protection agreements
- 19 double taxation agreements

欧盟 (5.13亿)

- 世界上最大的经济体和消费市场
- 货物、服务、资本、劳动力的自由流动
- 成员国的关联协议

European Union (513 million)

- Largest economy and Consumer market in the world
- Free movement of goods, services, capital, workers
- Association agreements with candidate countries

中东和北非(4,37亿)

- 和区内国家有8项欧洲-地中海协会协议
- 和区内国家有18项投资保护协议
- 和区内国家有21项避免双重征税协议

MENA countries (437 million)

- 8 Euro-Mediterranean Association Agreements
- 18 Investment protection agreements
- 21 double taxation agreements



西班牙 ICT 行业的主要参与者

Main players in the Spanish ICT industry

Software Vendors



Hardware Vendors



Telecom equipment vendors



Service Providers



ICT Services and Consulting Companies



政府对数字化的承诺非常坚定

Government's commitment to Digitalisation is strong

DIGITAL SPAIN 2026

- 数字西班牙2026是国家数字化转型的路线图，并在三个主要方面采取行动：基础设施和技术、经济和人民。
Digital Spain 2026 is the roadmap for the country's digital transformation and acts in three key dimensions: infrastructure and technology, economy and people.
- 议程制定约50项具体战略，以促进西班牙的关键技术，其中包括：连接性、5G、网络安全、大数据和人工智能。This agenda features around 50 specific strategies to promote technologies that are crucial for Spain, including: connectivity, 5G, cybersecurity, Big Data and Artificial Intelligence.

DIGITAL EUROPE PROGRAMME

- 该计划旨在弥合数字技术研究和市场部署之间的差距 Programme designed to bridge the gap between digital technology research and market deployment.
- 为5个关键领域的项目提供资金：超级计算、人工智能、网络安全、高级数字技能和确保数字技术在整个经济和社会中的广泛使用。It provides funding for projects in 5 crucial areas: supercomputing, AI, cybersecurity, advanced digital skills and ensuring the wide use of digital technologies across the economy and society.

NEXT GENERATION EU

- 超过 8000 亿欧元的复苏计划，用于帮助修复疫情带来的直接经济和社会损失 More than €800 billion recovery instrument to help repair the immediate economic and social damage brought about by the coronavirus pandemic.
- 西班牙从经济复苏和转型计划 (NextGenerationEU基金) 获得最高额资金：2021 年至 2026 年间高达 1400 亿欧元，其中 23.1% 用于工业的现代化和数字化、中小企业和旅游业，以及促进西班牙的创业。Spain is the country that will receive most funds from the Recovery, Transformation and Resilience Plan (NextGenerationEU): up to 140 billion euros between 2021 and 2026, 23.1% of which will go to the modernisation and digitalisation of industry, SMEs and tourism, as well as promoting entrepreneurship Spain.



西中合作与投资新机遇

New opportunities for investment and cooperation between Spain and China

■ 大数据和人工智能 Big Data and AI

- ✓ 西班牙政府对数据经济和人工智能的承诺包括建立国家数字化和人工智能秘书处
Spanish government's commitment to the data economy and artificial intelligence includes the creation of a State Secretariat for Digitization and Artificial Intelligence.
- ✓ 专家表示，基于大数据和人工智能技术的应用是西班牙增长的巨大机会，预计到2025年该行业将产生160亿欧元的收入。
Experts say the use of technology based on Big Data and AI is the big opportunity for growth in Spain, as it is expected to generate industry revenues of €16 billion by 2025.

■ 网络安全 Cyber Security

- ✓ 西班牙的战略产业（能源，电信，银行等）是网络安全的重要产业，并创造最大的业务量
Strategic sectors in Spain (energy, telecommunications, banking, etc.) are important sectors for cybersecurity and generate the largest business volume
- ✓ 西班牙为网络安全提供了一个有趣的市场。95%的商业生态系统由中小企业组成，其中只有36%使用基本的网络安全协议，因此是一个重要的增长利基。
Spain offers an interesting market for cybersecurity. 95% of the business ecosystem consists of SMEs, and of these only 36% use basic cybersecurity protocols, thus representing an important niche for growth.

■ 5G技术 5G technology

- ✓ 5G技术是《数字西班牙2026计划》的行动路线之一，该计划在2021年的预算为3亿欧元。
5G technology is one of the lines of action of the Digital Spain 2026 Plan, whose budget in 2021 has been 300 million euros.
- ✓ 西班牙有一个国家5G计划，一个国家5G观察站，并坚定不移地致力于这项技术。
Spain has a National 5G Plan, a National 5G Observatory, and an unwavering commitment to this technology.



政府支持

Government Support

- **西班牙投资促进局**提供全面的帮助，涵盖投资者的所有需求，包括法律、财务、劳工、运营和市场调查
INVEST IN SPAIN offers integral assistance covering all the needs of investors, including legal, financial, labour, operations and market research
- **西班牙驻华大使馆广州经济商务处**致力于推广西班牙作为投资目的地国家，向中国企业及投资者在西营商与投资全程提供服务
Economic & Commercial Office of Spain in Guangzhou promotes Spain as a business destination and follows up on the needs of Chinese investors doing business in Spain

向中国企业在西班牙投资全程提供支持

Provide support for Chinese enterprises to invest in Spain throughout the process

与国家及地方政府部门沟通的单一窗口

Single window to communicate with national, regional and local administrations

帮助投资者巩固和扩大在西投资

Help investors to consolidated & expand their investments in Spain



ICEX

**INVESTIN
SPAIN**



EMBAJADA DE ESPAÑA
OFICINA ECONÓMICA Y COMERCIAL DE CANTÓN

西班牙驻华大使馆广州经济商务处



感谢您的关注

THANK YOU FOR YOUR ATTENTION

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