

Andalusia for Investors

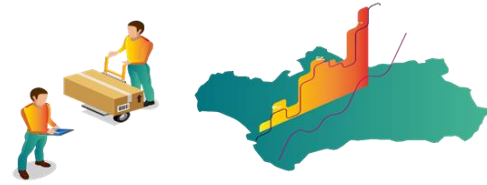


November 2023



Junta de Andalucía
Consejería de Economía, Hacienda
y Fondos Europeos
Agencia de Innovación y Desarrollo
de Andalucía IDEA

Business Climate in Andalusia



According to the **Barometer of the Business Climate in Andalusia in 2022**, by the International Center for Competitiveness (ICC) of IESE, based on surveys conducted with foreign companies in the region, the results show that companies in Andalusia prioritise:

- Local Infrastructure
- Quality of Life
- Market size
- Human capital

Business expectations for foreign companies operating in Andalusia are positives for 2023

- 80% expect to increase or maintain their investments
- 88% expect to increase or maintain the number of employees
- 80% of foreign companies have favorable turnover expectations and are confident of increasing their revenues
- 8% expect to reduce their export sales

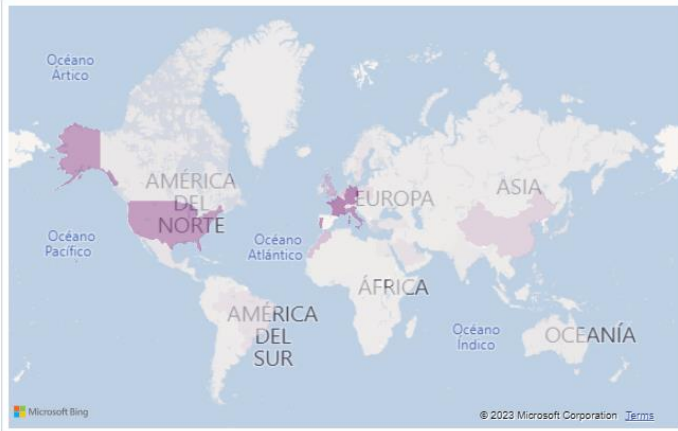
In general terms, companies located in Andalusia rate the business climate favorably and their expectations for the future are also favorable

Export focus

Andalusia achieves exports of 28,498 million euros in the period between January-Septembre 2023, the second best record in history



- The largest growth is in the industrial sector: copper and its manufactures (17,2%) and electric material, apparels & machines (15,9%).
- The aerospace sector ranks 6th with 4,3% of the total exports.



Basic Data

ANDALUSIA, a competitive region in the South of Spain

2nd largest region in Spain
87.597 Km2

A large market
+ 635.000 companies
+ 723.000 facilities

Most populated region in Spain
8,5M inhabitants

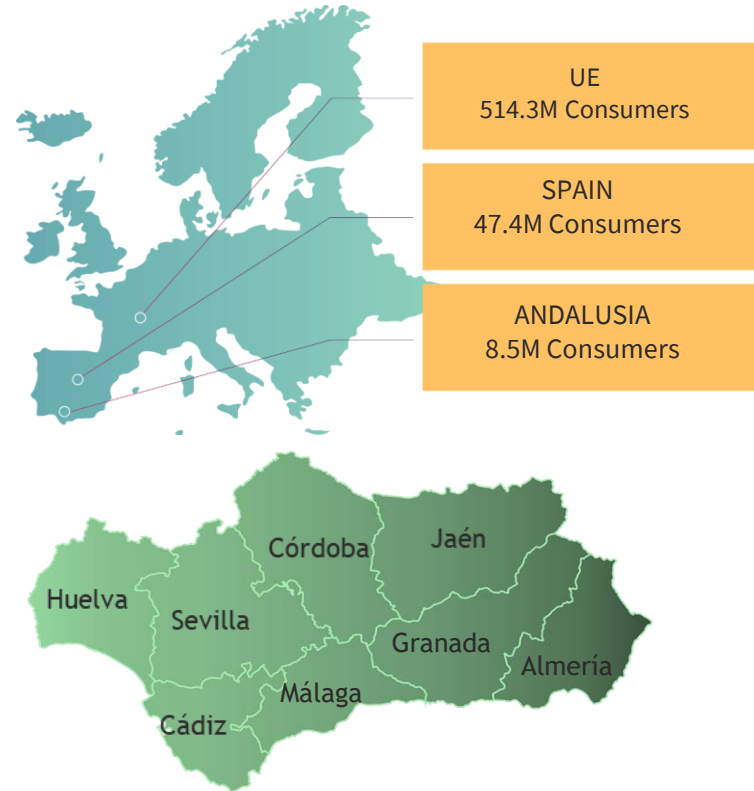
2.500 foreign companies with branches

GDP (2022)
€189 Billions

+5.600 export companies

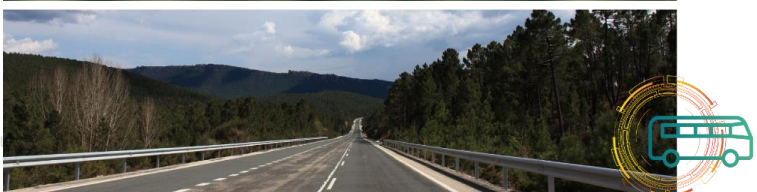
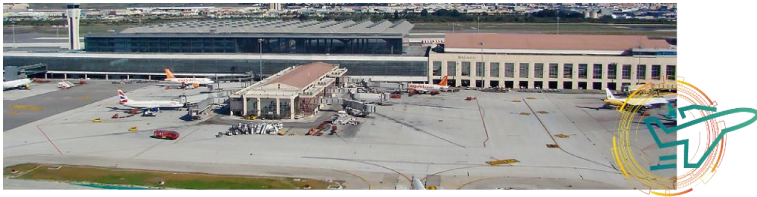
Employment
+ 3.3M professionals

Unemployment
18,1%



Infrastructure

Andalusia has been chosen as the European Region with the best connectivity, according to the ranking of European Regions of the Future 2022/23 conducted by FDI Intelligence.



AIRPORTS

- 5 international airports in Andalusia
- Malaga, and Seville airports, rank 1st and 2nd in Andalusia. Seville airport has significant expansion project

PORTS

- 10 ports in Andalusia
- Algeciras is the largest container port in the Mediterranean
- Trade Free Zones in Cádiz, Algeciras and Seville

HIGH-SPEED TRAIN

- High-speed train railways
Madrid-Cordoba-Sevilla-Malaga and Granada
- 3rd in the world

HIGHWAYS

- Largest EU highway network
- 14,701 Km total length in Spain
- 2,813 km length in Andalusia

Human Resources

Andalusia is a mine of talent with high level of young people



Training, Talent and Capability are the three cornerstones of the Andalusian labor market



Home to **13 universities** (including 10 public), Andalusia is the 3rd largest Spanish region for graduate employees



Andalusia is an area that attracts and retains **international talent** has large colonies of foreign citizens

Andalusia has the largest pool of active workers in Spain (+4M), similar to European countries such as Switzerland or Austria.

The job rotation index in Andalusia is lower than the national average

Technology Ecosystem

Prime Technology Infrastructure



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Science and Technology Parks

Companies: 1,643

Employees: 68.215

Turnover: 9,029 M€

R&D: 362 M€ investment / 7,899 employees

- **Malaga Tech Park + Cartuja Seville:**

Advanced services, ICT and RD+I – approx. 20% of national workforce in Tech Parks

- **PTS Granada:** Health Sciences Tech Park
- **Aeropolis:** Aviation & Aerospace Tech Park

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Technological Innovation and Technology Centers Foundation

Some outstanding examples:

ANDALTEC (plastics),

CATEC (aerospace),

CETEMET (metal mechanics & transport),

CTAER (renewable energies)

TECNOVA (auxiliary technologies for agriculture)

Key sectors

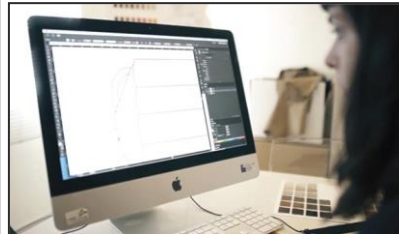


AEROSPACE

3rd Largest European aerospace Cluster

BIOTECHNOLOGY AND HEALTH

Leader in advanced therapies and agrobiotech, with important research and innovation centers



ICT, MEDIA & AUDIOVISUAL SERVICES

3rd Spanish region for companies and employees

RENEWABLE ENERGIES

Strong wind & sun energy producers with industry associated in place



CHEMICAL INDUSTRY

2nd region in Spain in Chemical sector with 45% growth.



METALLIC MINING INDUSTRY

Iberian Pyritic Belt, the largest concentration of polymetallic sulfides on the planet.

FOOD INDUSTRY

Food and nutrition production hub, with renowned R&D centers of excellence.



LOGISTICS

1,800 ha, 11 logistics hubs, 37 million m² of specialized facilities



Success cases



Investments services

Planning

01

- Information on sectorial regulation, industry situation and market
- Search for the best location
- Scheduling personalised visits to locations and meetings with institutions and potential partners
- Information on business opportunities
- Information about grants and financing sources
- Information on available workforce and operational costs

Softlanding

02

- Information on available workforce, employment and operational costs and procedures for work and residence permits
- Assistance through national and regional institutions
- Information and follow-up on permits and administrative procedures required to commence professional activities
- Information about potential local providers

Aftercare

03

- Personalised service of project monitoring established in Andalusia
- Tailored proposals for parent companies
- Support on potential expansion plans

Friendly Business Climate for Investors

Improvement of regulation to reduce administrative procedures



The Project Accelerator Unit (UAP) is an initiative of the Government of Andalusia created in 2019 for speeding up strategic projects in the Region in order to foster the attraction of investment to Andalusia.

Requirements

Investment	Minimum investment of €25 million, not including public contributions and subsidies.
Employment	Creation of at least 50 direct full-time equivalent jobs on an annual basis during the operational phase.

Benefits

Preferential administrative procedure.

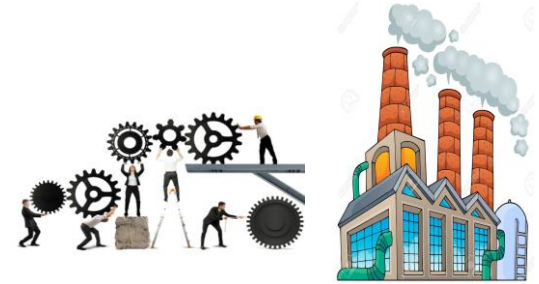
Reducing administrative delays by half.

Customised services: once the project has been assigned to the UAP, it will provide assistance and advice to investors on all the procedures necessary for the launch and execution of the project in the region.

Incentives & financing programmes

Strong collaboration with other regional and national public and private institutions

- **Industrial development** - programmes for the improvement of competitiveness, digital transformation and job creation
- **R&D** - programmes for the promotion of industrial research, experimental development and business innovation
- **Job creation** - Non reimbursable incentives and reduction in social security contributions
- **Training** – programmes for the development of training with a commitment to recruitment or dual vocational training among others.
- **Venture Capital Funds**





**For a sure win,
Invest in Andalucía**



Elena Gallego Cañabate
Head of Foreign Direct Investment
Invest in Andalucía
egallego@agenciaidea.es
www.investinandalucia.es