

ICT Industry Master Plan

2026-2028

Executive Overview



XUNTA
DE GALICIA

ICT Industry Master Plan

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XUNTA
DE GALICIA



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Introduction

This document is the **executive summary of the ICT Industry Master Plan 2026-2028**, a planning tool that sets out the main strategic axes, objectives, and lines of action defined to guide the development of the sector over the coming years. The plan was created **to drive the adoption and development of emerging digital technologies in Galicia**, fostering innovation, sustainability, and inclusion in the Galician ICT sector to improve the competitiveness of the business fabric and of Galician society as a whole.

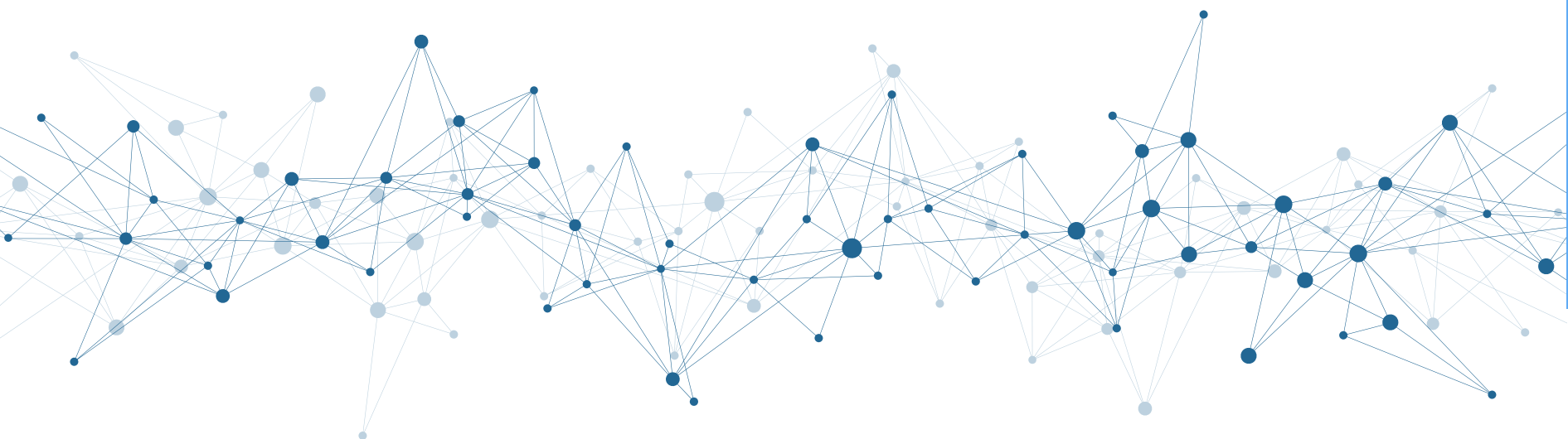
ICT stands out among the strategic sectors: by combining industrial and services activities, it serves as a pillar for digital transformation and enables other sectors of the economy to harness digitalisation for their own benefit.

This executive summary outlines the strategic vision guiding the planned actions, which cover key areas such as internationalisation, sustainability, competitiveness and innovation, investment and ICT product creation, people, infrastructure, the digitalisation of productive sectors, and a new governance model.

1. Overall strategy for industrial policy in Galicia

Galicia's industrial policy combines the green and digital transition, strengthening of the productive fabric, and coordination with other public policies to boost competitiveness and sustainability while modernising the Galician economy.

Industry must lead the **dual green and digital transformation**, which represents a new paradigm and a major challenge for European society. This transition is a vital and dynamic process that will address social, environmental, and economic challenges while boosting sustainability and competitiveness in an increasingly digitalised world.



Current context: green and digital transition

Digitalisation and sustainability are fundamental levers for modernising industry, increasing productivity, and strengthening competitiveness.



Industrial policy in Galicia

Industrial policy in Galicia seeks to strengthen and modernise the productive fabric, enhancing competitiveness and promoting sustainable development. The strategic framework includes various plans and instruments, such as sectoral master plans, which outline measures to boost the key strategic sectors of the region.

The political drive for digital transformation must encourage ICT sector stakeholders **to support the evolution of all economic and social sectors**. In this regard, the European Digital Strategy aims to make Europe a global leader in the digital economy, focusing on areas such as artificial intelligence, 5G, semi-conductors, robotics, cybersecurity, and the digitalisation of industry.

The Galicia Digital Strategy 2030 serves as the roadmap for harnessing digital technologies to achieve regional development objectives. The Master Plan sets out the measures required to boost the growth and competitiveness of ICT industry entities, allowing them to attain the results proposed in this strategy.



The Xunta de Galicia’s commitment to supporting the Galician ICT sector under an integrated vision will help strengthen the economy and society, both of which need digital solutions.

The Xunta de Galicia applies its industrial policy actions across various planning instruments. The following analysis covers the instruments it has adopted to support and develop the regional industrial fabric.

Sectoral master plans

Strategic tools designed to foster the development of industrial activity in sectors designated as strategic, removing barriers and promoting innovation and infrastructure modernization with a people-centred approach.



Industrial map

An information tool for analysing, consulting, and measuring the impact of Galician industry, to complement the sectoral master plans.



Other instruments

Measures to promote industrial projects, facilitate access to business land, reduce energy costs, and ensure industrial safety.

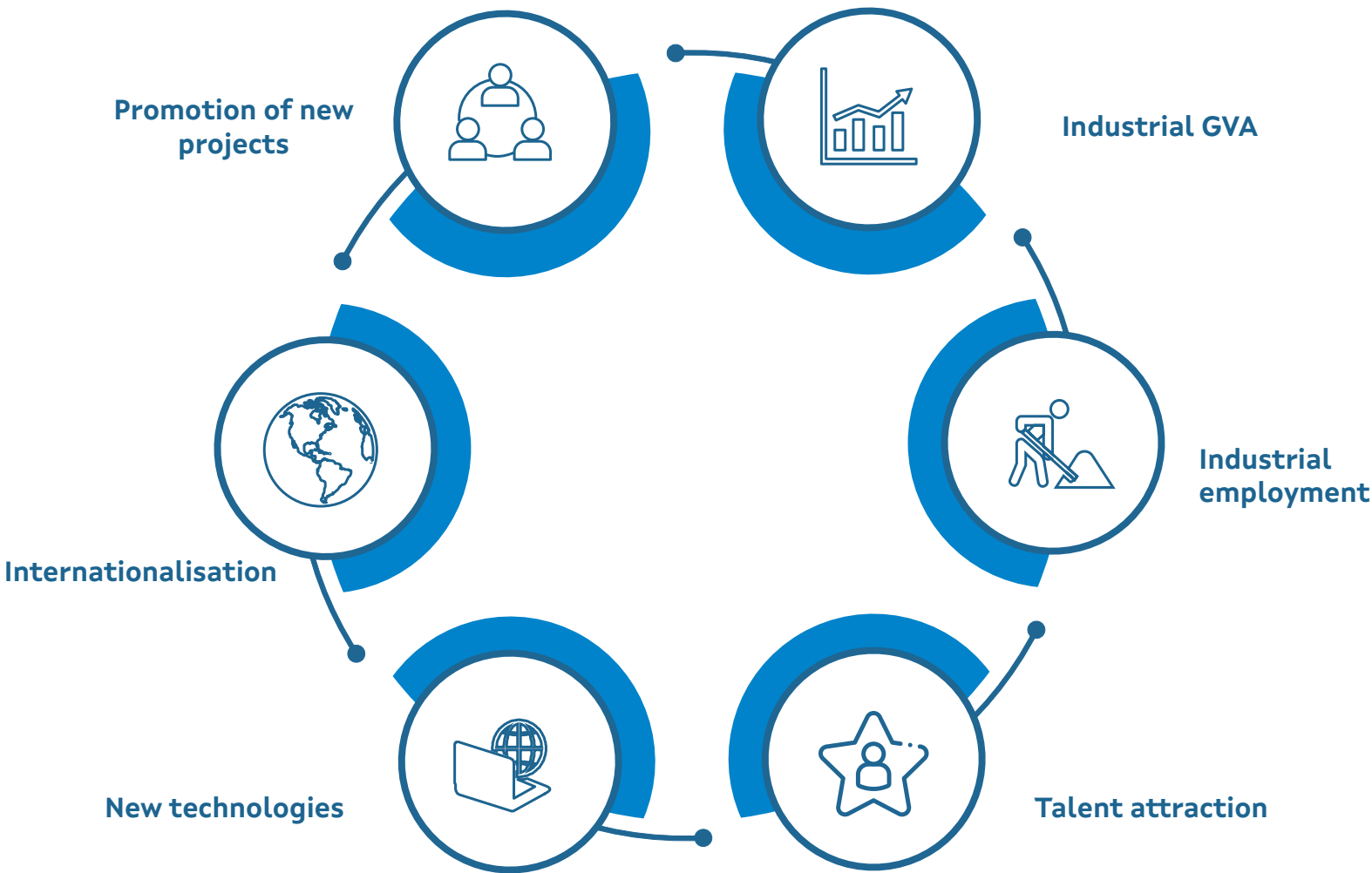


The sectoral master plans follow a quadruple helix approach, involving 1) the administration, 2) the business community and social stakeholders, 3) academia and competence centres, and 4) citizens.

2. Challenges facing Galician industry

Galician industry has shown an outstanding capacity for resilience and adaptation in a socioeconomic context marked by global economic instability, geopolitical conflicts, the energy crisis, tensions in supply chains, and the demands of sustainability and digital transition.

Now, within the framework of the digital and green transition, the challenge is to consolidate this evolution and strengthen competitiveness to position Galicia as a hub for new investment and industrial projects.



Industrial GVA

Industrial GVA must increase its structural weight to reach the 20% target.



Industrial employment

The main challenge for industrial employment is to maintain growth in the coming years while encouraging greater participation of women in industrial branches where they are underrepresented.



Talent attraction

It is crucial to promote measures that attract young people and enhance the image of industry in society.



New technologies

Improving industrial productivity requires the incorporation of new technologies, process digitalisation, and adaptation to new labour market requirements.



Internationalisation

Greater internationalisation will help the region continue achieving record figures in the coming years.



Promotion of new projects

It is essential to foster an industrial ecosystem that facilitates new projects and delivers the public policies needed to drive and consolidate Galician industry.

3. The ICT sector and its value chain

The ICT sector value chain in Galicia is configured as a specialised ecosystem that brings together software development companies, technology and telecommunications service providers, equipment manufacturers and distributors, as well as technology centres, universities, and other agents supporting innovation. Activities in the value chain include the development of digital solutions, the provision of advanced ICT services, and the supply of the infrastructure and components needed for their deployment and operation. These activities position the sector as a strategic area for the digital transformation of the economy and the public administration.

The ICT sector is a pillar of digital transformation, providing the infrastructure and the related goods and services, and enabling other sectors of the economy to harness digitalisation for their own benefit.

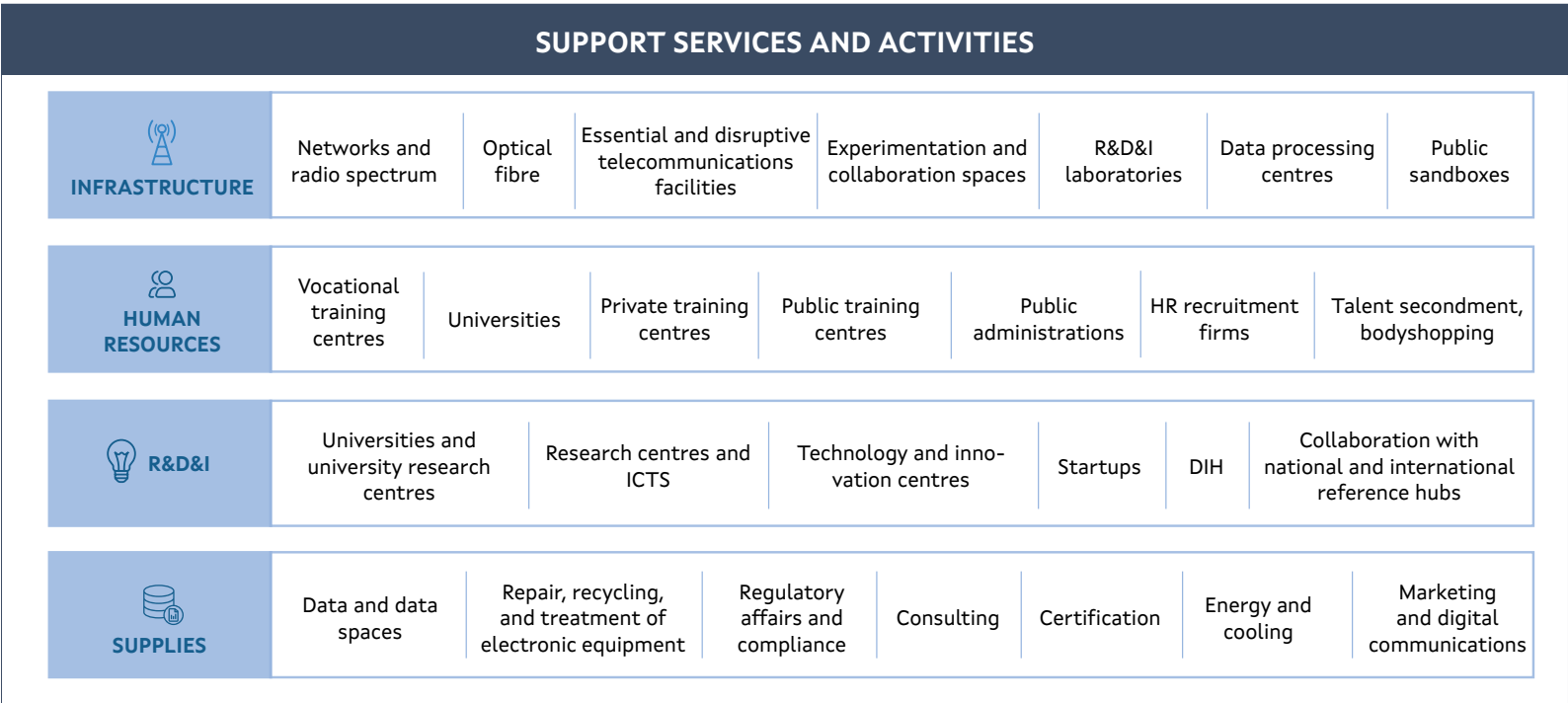
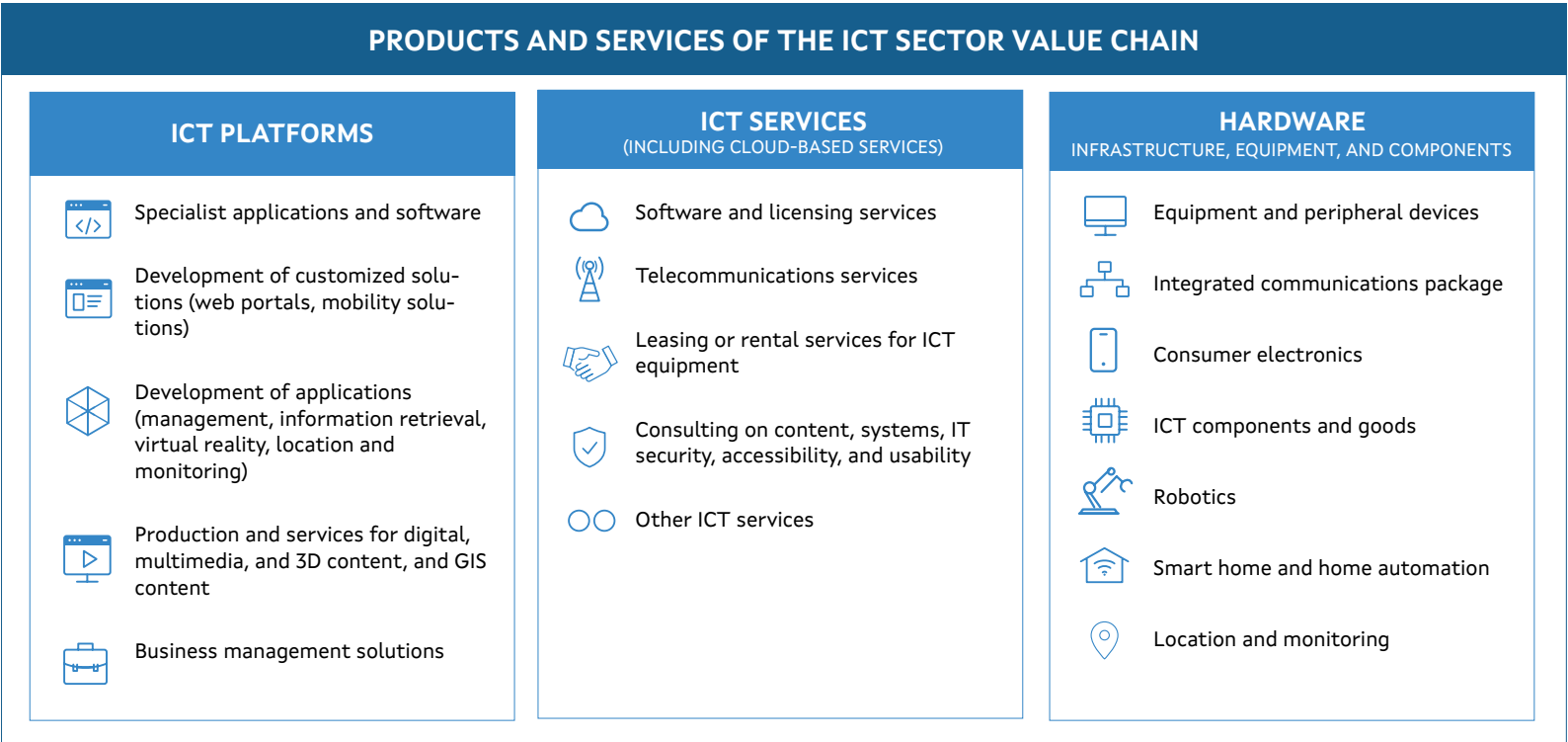
The ICT sector is characterised by high levels of innovation, technological progress, and productivity, and therefore has a considerable impact on economic activity.

The ICT industry stands out among strategic sectors by combining industrial and service activities and serving as a pillar for the digital transformation of the whole economy.

The predominance of ICT services explains much of the current structure of the sector but also highlights the need to move towards models with greater added value, greater scalability, and greater capacity for internationalisation.

The value chain linked to software as a service represents a strategic opportunity for Galician companies to transform accumulated knowledge into replicable, exportable digital products with higher profitability.

Knowledge transfer from universities, research centres, and technology centres is a key lever for strengthening the ecosystem, although there is still room for improvement in turning scientific and technological capabilities into market solutions.



4. Sectoral figures

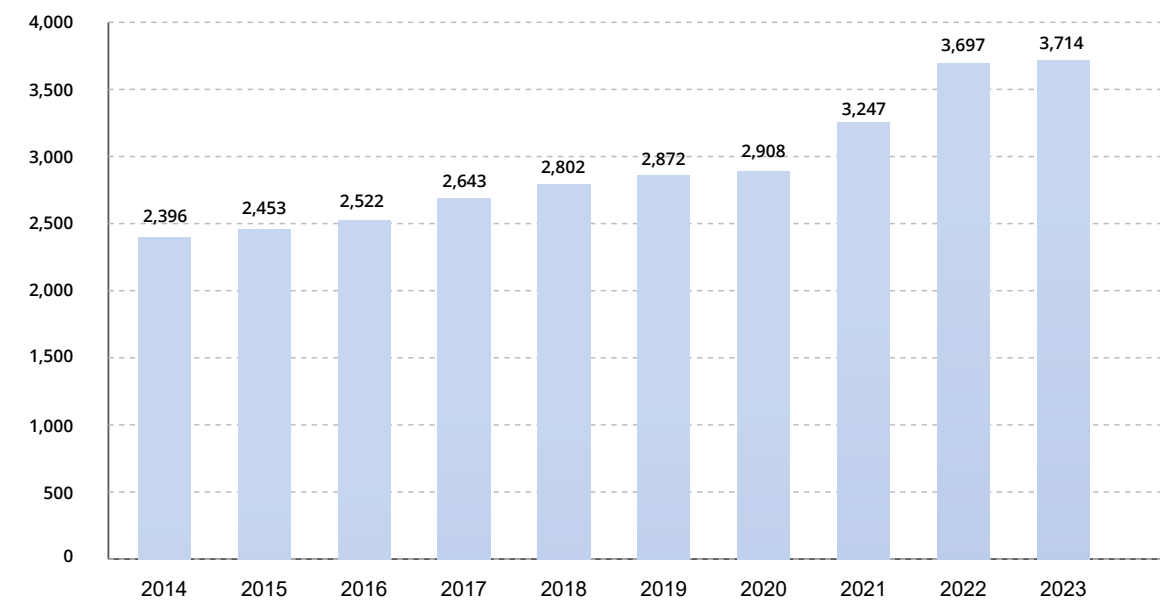
The Galician ICT sector is quantitatively significant for the Galician economy as a whole. According to the OSIMGA report, it accounts for 2.5% of GDP and 2.2% of employment in Galicia, with a turnover of EUR 3,714 million across 3,108 companies in 2023, representing growth of 28% since 2020.

Share of Galician GDP	2.5 %
Share of employment in Galicia	2.2 %
2023 turnover	EUR 3.714 million
Companies in 2023	3.108 companies
Turnover growth since 2020	28 %
Social Security affiliations in 2024	23.467 affiliations
Employment growth since 2020	21 %, with more than 4.000 new professionals

The Galician ICT sector has shown positive developments in turnover and employment, confirming its growing relevance for the Galician economy and its potential to gain structural weight in the coming years.

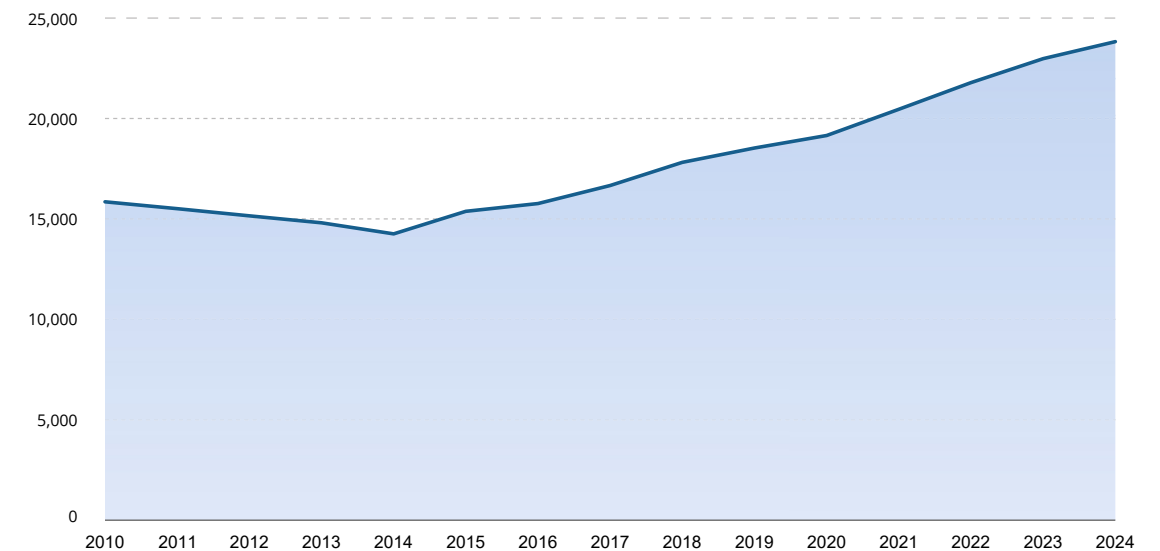
In terms of number of companies and employment, Galicia ranks sixth in Spain, behind the Community of Madrid, Catalonia, Andalusia, the Valencian Community, and the Basque Country.

Evolution of ICT sector business volume in Galicia (millions of euros)



Evolution of the ICT sector’s turnover in Galicia. **Source:** Osimga

Social Security affiliates in the Galician ICT sector



People registered with Social Security in Galician ICT sector. **Source:** Own elaboration based on IGE 2024 data.

The sector is characterised by very small business size, as 79% of companies have between zero and two salaried employees. Excluding self-employed workers and micro-enterprises with fewer than 10 employees, the core of the business fabric consists of 291 companies (9% of the total). Of these, only 39 companies have 100 or more salaried employees.

The atomised business fabric and scarcity of medium-sized and large companies are among the sector's main weaknesses, as they limit driving capacity, business scaling, and international presence.

Forty per cent of the workforce in ICT companies has a university degree, while 28% has STEM vocational training qualifications. Women occupy only 31% of all posts. Among workers with STEM university degrees, the share of women is even lower (11%).

Access to specialised talent, greater female representation in STEM roles, and the capacity to attract and retain qualified professionals are determining factors for consolidating the sector's future growth.

The predominant business model in the ICT sector is B2B, as 71% of its customers are businesses. Public administrations represent 11% of turnover, and Galician ICT companies depend heavily on the regional market. This strong dependence on the Galician market and the predominance of service-based models make it necessary to strengthen commercial orientation, internationalisation, and the creation of proprietary technology products.

5. Strategic projects

Notable among the region's recent milestones are several infrastructures and services launched through public-private collaboration, which have had a major impact on the ecosystem: the ICT City, the ICT Dual Campus, the Quantum Technologies Hub, and the 1HealthAI Factory.

1. ICT City

Advanced services centre and mixed business-university campus, with innovation laboratories and a dedicated AI datacentre.

2. ICT Dual Campus

A practical training initiative designed for rapid entry into the labour market, based on the bootcamp format.

3. Quantum Technologies Hub

An ecosystem for scientific-technological development and innovation, led by CESGA and coordinated with the Galician Quantum Technologies Network.

4. 1HealthAI Factory

Strategic infrastructure for the development, experimentation, and deployment of artificial intelligence-based solutions, with a One Health approach.

6. SWOT

Weaknesses (-) | Internal factors

1. Very small company size, with a high presence of micro-enterprises in the Galician ICT fabric.
2. Few medium-sized and large companies, which limits driving capacity, scaling, and international presence.
3. Lack of proprietary technology products and strong dependence on services, which reduces scalability and business growth.
4. Lack of commercial structure in companies, especially SMEs, hampering market knowledge and business development.
5. Limited collaboration between companies and research and innovation organisations, reducing knowledge transfer to the market.
6. Lack of specific measures for attracting and retaining ICT talent in a knowledge-intensive sector with strong global competition.
7. Lack of a specific international strategy for the sector, with limited regional presence in standard-setting bodies and benchmark European programmes.
8. Limited visibility of success stories and capabilities of the Galician ecosystem, which restricts its ability to attract investment, talent, and sales.



Strengths (+) | Internal factors

1. A strategic sector for the Galician economy, with a significant share of the region's GDP and employment.
2. High growth since 2020, both in turnover and employment.
3. Strong collaboration between the business community and the regional administration.
4. Strategic drive and leadership of the Xunta de Galicia in digital modernisation.
5. Outstanding position in the digitalisation of the public health sector, with the capacity to act as a benchmark and validation environment.
6. Sector designated as strategic in Galicia, enabling a specific response through industrial policy.
7. Strong commitment to ICT training, characterised by leadership in higher-level vocational training enrolments and a robust public and private training ecosystem.
8. Presence of public bodies, knowledge centres, and relevant technological capabilities, including AMTEGA, AESIA, CESGA, universities, technology centres, and support programmes for the creation of spin-offs.

Threats (-) | External factors

1. Geopolitical instability, with potential impact on technological development, access to data, and key goods for the sector.
2. Increase in legislation and risk of over-regulation in emerging technologies.
3. Shortage of ICT professionals and low birth rate, intensifying competition for attracting and retaining talent.
4. Loss of European competitiveness due to insufficient software protection, compared with other markets that are more advanced in this field.
5. High turnover and delocalisation of digital work, which hinder motivation and retention of workers.
6. Reduction in technology adoption cycles, requiring continuous learning and increasing the risk of obsolescence.
7. Strong entry barriers in international markets, especially for SMEs and companies with lower commercial capacity.
8. Energy costs and reputational risks for the sector, linked to the deployment of digital infrastructure, the increase in cyberattacks, data protection, technological ethics, and environmental impact.



Opportunities (+) | External factors

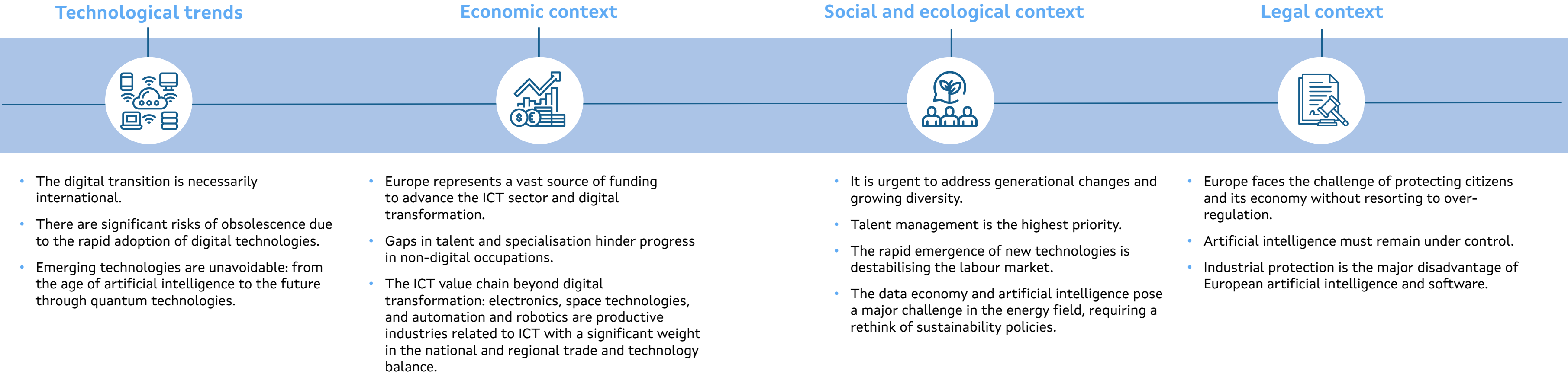
1. High demand for ICT solutions due to growing multisectoral digitalisation, both in the private and public spheres.
2. Growing investment in data processing centres and R&D centres linked to new technologies, where Galicia can attract new projects.
3. Necessary digital transformation of local administrations, as an area of opportunity for Galician technological solutions.
4. Potential for the ICT sector to reach 3% of Galician GDP by 2030, strengthening its economic role.
5. Capacity of the sector to attract talent, reaching up to 30,000 affiliates if the growth trajectory continues.
6. Incorporation of ICT tools to increase productivity in all sectors, reinforcing the driving role of the ICT sector across the whole economy.
7. Development of green ICT solutions, both to comply with regulations and to generate differential value in the market.
8. Reorientation of European priorities towards technological sovereignty, innovation, and digital technologies, with opportunities in European programmes, international tenders, and strategic projects.

7. Trends and future outlook for the ICT sector

The ICT sector is undergoing continuous and rapid transformation, defying all predictions in terms of the time and cost of technology adoption. Shorter validation and adoption cycles for new technologies create a high risk of double obsolescence: for the competitiveness of companies and economies, and for the skills of ICT specialists.

The European roadmap to 2029 is shaped by the Competitive Compass strategy and the Digital Decade programme. Its objectives can be summarised as: digitally skilled citizens, sustainable digital infrastructure, digital transformation of businesses, and digitalisation of public services.

Therefore, the Galician ICT ecosystem must move faster **to identify its distinctive competencies in these areas**, prioritise those that require further development, and align public-private collaboration **to ensure the availability of the talent, knowledge, infrastructure, and solutions needed** to reach the market. These efforts are essential **to preserve the current and future competitiveness not only of the ICT industry, but also of all productive and social sectors, as they will all participate, to varying degrees, in the next digital revolution.**

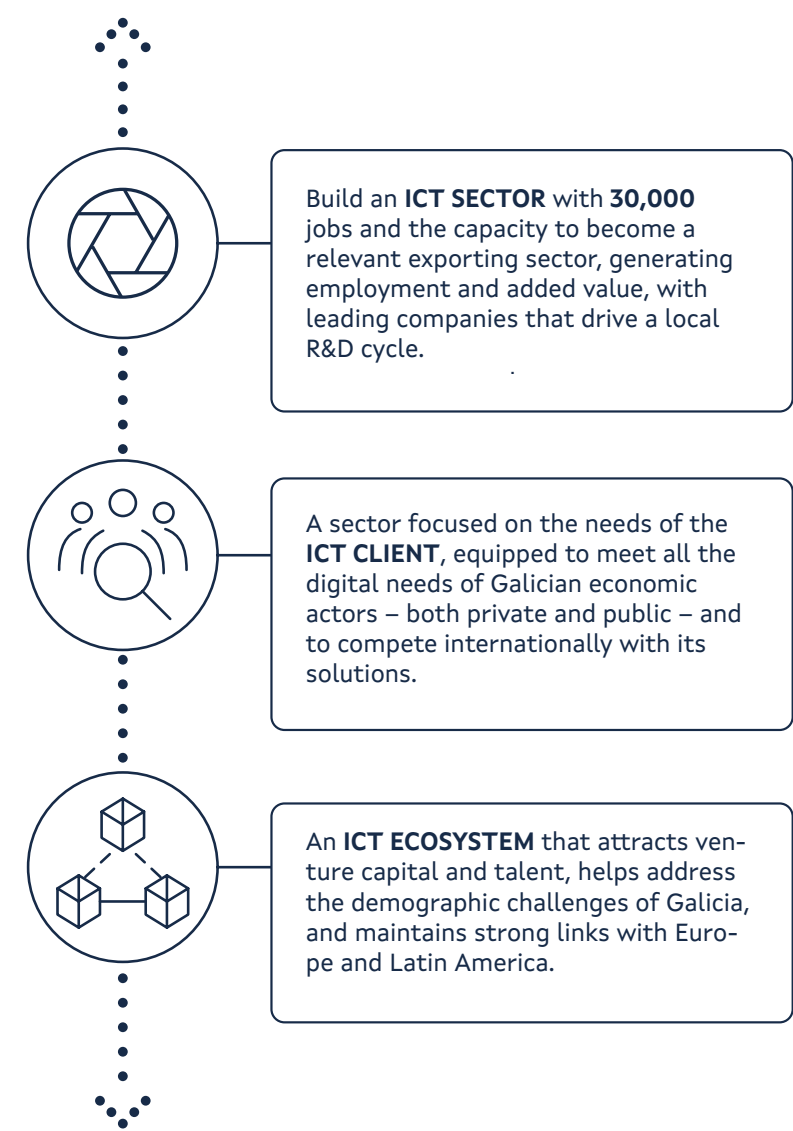


8. Strategic objectives and essential intervention criteria

The overall objective of this Master Plan is to promote the incorporation and development of emerging digital technologies in Galicia, fostering innovation, sustainability, and inclusion in the Galician ICT sector, to improve the competitiveness of the business fabric and of Galician society as a whole.

This is underpinned by the vision of Galicia as a European benchmark in digitalisation and in the adoption of disruptive technologies, with a robust and collaborative ICT ecosystem that drives economic development, job creation, and the transition towards a green and digital economy.

The overall objective unfolds into two strategic objectives, six axes, and eight priority areas, with measures oriented towards the 2026-2028 period.



Strategic objectives	Axis	Priority areas
S01. Galicia, a digital production powerhouse Drive and develop the Galician ICT industry, increasing its productivity and competitiveness	Axis 1 Productive, sustainable, and export-oriented ICT industry	P1. Internationalisation and business scaling
	Axis 2 Sectoral competitiveness and consolidation of ICT projects	P2. Sustainability
		P3. Competitiveness and innovation
S02. Strengthening the industrial ecosystem through ICT Strengthen the ecosystem to drive the full digital transformation and internationalization of Galicia	Axis 3 People	P4. Investment and ICT product creation
		P5. People
	Axis 4 Improvement of ICT infrastructure and promotion of ICT land	P6. Infrastructure and industrial land
	Axis 5 Digital ecosystem	P7. Digitalisation of productive sectors
	Axis 6 New governance	P8. New governance

9. Sectoral priorities

An analysis of the sector's current situation yielded eight sectoral priorities that will impact businesses and must be factored into the design of the Galician ICT Industry Master Plan.

These thematic areas were designated as fundamental by more than 70 sector experts, who identified both future needs and possible lines of action.



Internationalisation and business scaling

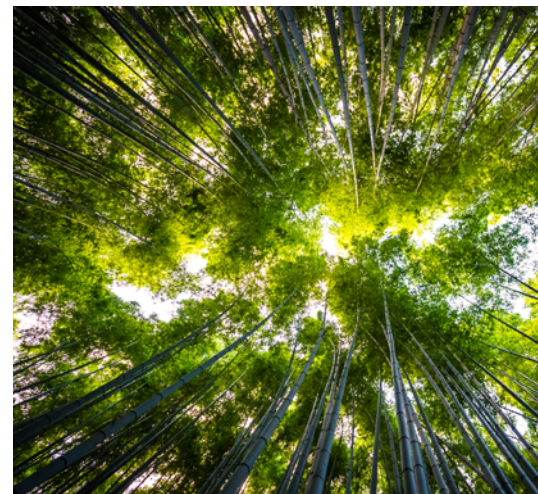
The Galician ICT ecosystem must strengthen its international positioning through external visibility strategies and alliances with multilateral organisations and leading technology regions. It is also necessary to structure actions to accredit, train, and support companies in their international growth.

Business scaling must be central to internationalisation efforts, fostering the emergence of ICT companies ready to compete in global value chains.

Sustainability

Amid growing digitalisation, the carbon footprint of IT infrastructure is a major concern, and action is needed to ensure Galicia develops a competitive and environmentally responsible ICT ecosystem.

Digital sustainability also includes the opportunity to develop data-driven, multisectoral energy optimisation technologies, positioning Galicia as a benchmark in green ICT solutions that are applicable to multiple industries.



Competitiveness and innovation

Scientific and technological research must be aligned with future business challenges to strengthen the connection between knowledge capabilities and the business fabric. This priority should help accelerate knowledge transfer to the market, foster the development of advanced technological solutions, and promote R&D&I projects capable of generating new products, services, and business models.

Specifically, innovation efforts must be channelled towards high-potential areas such as artificial intelligence, the data economy, cybersecurity, quantum technologies, and sectoral digitalisation, to strengthen the competitiveness of the ICT ecosystem and increase its added value.

Investment and ICT product creation

The Master Plan advocates a drive towards professionalisation and ICT product development. This commitment includes measures to strengthen innovation capacity through the creation of public-private service centres that facilitate access to technology and data, thereby supporting business growth.

The Master Plan also backs technological entrepreneurship in the sector, where investment incentives and solution testing call for public-private collaboration and stronger startup management capacity.





People

The shortage of qualified ICT professionals is a growing challenge, and demand for technical profiles is expected to continue increasing. Addressing this gap will require continuous training based on flexible models such as professional micro-credentials, as well as lifelong learning approaches that upskill employees.

Attracting and bringing back qualified talent will become strategic priorities, strengthening the connection with the Galician diaspora and attracting international profiles in advanced ICT areas. In addition, progress must be made towards including more women in the sector.

Infrastructure and industrial land

The consolidation of Galicia as a digital benchmark requires advanced, connected, and specialised territorial digital infrastructure, including next-generation connectivity, quantum capabilities, computing resources, and data spaces, enabling the development of new technologies and validation in real-world environments.

Full deployment of the ICT City is needed to boost sectoral capabilities. Galicia must also commit to territorial specialisation in digital technologies. These efforts must go hand in hand with the renewal and expansion of communication networks throughout the territory.



Digitalisation of productive sectors

The business and industrial fabric must adapt to technological changes in computing, security, and intelligent information and communication systems. ICT sector companies must lead the way in incorporating these capabilities so they can provide services to the rest of the economy.

The digitalisation of productive sectors requires sectoral digital platforms that integrate advanced solutions, as well as collaborative pilots that allow technologies to be validated in real-world environments. The Xunta de Galicia, as a pioneering administration in innovation, will continue to act as a testing ground and benchmark for the ecosystem.

New governance

Public and private stakeholders must coordinate on strategic aspects related to technologies, digital transformation, and their socioeconomic impacts.

The governance structure of the plan enables the incorporation of advanced monitoring and evaluation instruments, as well as an internal and external communication strategy to showcase the ecosystem's progress and strengths.



10. Action Plan. Measures and mechanisms to strengthen the industry

The Xunta de Galicia, in its commitment to strengthening the ICT sector, has launched a series of measures and programmes to address the priority needs identified. These actions range from boosting technological innovation and digitalisation to upgrading vocational training and promoting environmental sustainability.

This section describes the available measures, organised according to the plan’s strategic axes. Overall, the Action Plan comprises six axes, eight priority areas, and 22 lines of action and 77 measures*, providing a clear overview of current and planned initiatives, as well as a coordinated and effective response to the sector’s demands.

The integrated approach aims to ensure that the Xunta’s interventions are effective and fully aligned with the realities and challenges of Galicia’s ICT industry, while also facilitating the monitoring of actions and their connection to the Master Plan’s strategic objectives.



Axis 1: Productive, sustainable, and export-oriented ICT industry

Axis 1 promotes internationalisation, business scaling, and sustainability as key elements for improving the productivity and competitiveness of the Galician ICT sector. It includes two priority areas, nine main measures, and five cross-cutting measures aimed at strengthening companies’ international presence, supporting their growth, and positioning Galicia as a benchmark in green ICT.

Axis 2: Sectoral competitiveness and consolidation of ICT projects

Axis 2 promotes innovation, knowledge transfer, the development of proprietary ICT products, and technological entrepreneurship as essential factors for increasing the sector’s added value. It includes two priority areas and 26 measures, one of which is cross-cutting at axis level, aimed at consolidating more innovative, scalable, and market-oriented business projects.



**The plan includes 77 measures directly linked to the different lines of action, although they may also appear under other lines when they are cross-cutting in nature.*

Axis 3: People

Axis 3 focuses on talent as a prerequisite for the growth of the Galician ICT sector, through continuous training, professional micro-credentials, efforts to attract and bring back talent, and the promotion of equality. The axis includes 22 main measures and one cross-cutting measure aimed at strengthening digital skills and improving the availability of specialised profiles.



Axis 4: Improvement of ICT infrastructure and promotion of industrial land

Axis 4 promotes the development of an advanced, connected, and specialised territorial digital infrastructure that enables the deployment of new technologies and the attraction of innovative companies. With four main measures and four cross-cutting measures, it aims to complete the ICT City, improve connectivity, and promote new R&D&I infrastructures.

Axis 5: Digital ecosystem

Axis 5 drives the digitalisation of productive sectors and reinforces the Xunta de Galicia’s leading role in ICT innovation, promoting sectoral platforms, data- and artificial-intelligence-based solutions, and digital best practices in the administration. With six main measures and four cross-cutting measures under this priority, it aims to accelerate the digital transformation of Galicia’s economy.



Axis 6: New governance

Lastly, axis 6 establishes the coordination, monitoring, evaluation, and communication mechanisms needed to ensure effective implementation of the Master Plan. This axis includes 10 measures to strengthen collaboration between the administration, the ICT sector, social stakeholders, and representative bodies, while also making the Galician ICT value chain visible.

Axis 1: Productive, sustainable, and export-oriented ICT industry

Internationalisation and business scaling

X1 Boost ICT sector internationalisation

An office will be set up to support the international activity of the ICT sector, providing services in Galicia and in destination markets to facilitate access to international tenders, strengthen ties with international organisations, and raise the international profile of the Galician ICT ecosystem.

X2 Encourage ICT company growth

Organic and inorganic growth of ICT companies will be promoted through mergers, acquisitions, and integration processes, supported by the Economic Office of Galicia, the Re-acciona programme, and the Galicia ICT Cluster, as well as Xesgalicia and other co-investment funds.

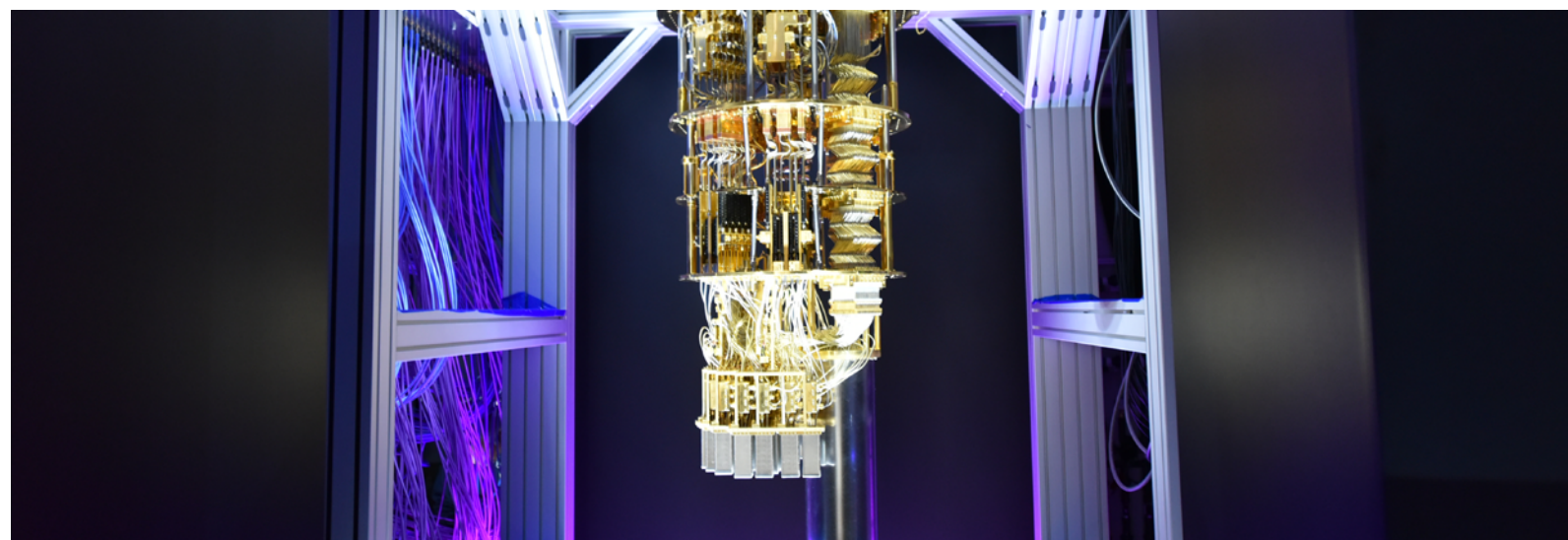
Sustainability

S1 Galicia as the epicentre of green ICT

ICT companies will be encouraged to adopt energy sustainability measures and certifications to strengthen their brand reputation.

S2 Promote multisectoral energy efficiency through innovative digital solutions

Innovative programmes and initiatives based on intelligent monitoring and advanced data analysis will be promoted to optimise energy consumption.



Axis 2: Sectoral competitiveness and consolidation of ICT projects

Competitiveness and innovation

C1 Promote Galician deep-tech ICT missions geared towards market challenges and opportunities

A Strategic Agenda for ICT business R&D&I needs, defined by the sector itself, will be promoted to anticipate technological needs and strengthen collaboration between companies and knowledge centres.

C2 Train Galician ICT companies in business and professional certifications and management excellence

Financial support instruments will be sought to encourage sector-specific certifications. In addition, a support service will be launched for companies that develop, market, or use high-risk artificial intelligence systems.

C3 Strengthen the Galicia ICT Cluster as the sector's structuring axis

The Galicia ICT Cluster will be established as the ICT ecosystem's single platform to foster collaboration, roll out services, and promote a digital twin of the ICT sector.

C4 Boost the visibility and reputation of the Galician ICT sector

Actions will be taken to improve the visibility, positioning, and reputation of the Galician ICT sector in national and international markets.

Investment and ICT product creation

I1 Promote investment and ICT product development by Galician ICT companies

The development of proprietary technology products, SaaS platforms, and digital solutions transferable to other sectors will be promoted to strengthen the innovative capacity and competitive positioning of the Galician ICT sector.

I2 Attract and foster new data centres and ICT services

The attraction and promotion of ICT service centres based on new experimentation infrastructures and collaborative technology centres will be encouraged.

I3 Facilitate entrepreneurship and the consolidation of ICT startups in Galicia

Acceleration actions for projects by new or established high-potential entrepreneurs will be promoted through instruments such as accelerators or Tech Angel.

Axis 3: People

People

P1 Create the Continuing Professional ICT Training School of Galicia and fully develop the professional micro-credentials model

A training strategy based on professional micro-credentials will be promoted. Within this framework, the ICT Dual Campus will also be strengthened as a benchmark platform for reskilling, upskilling, and university-business connection, while STEM vocations, equality, and female leadership will be promoted.

P2 Equip the sector with an employment and talent portal with both local and international reach

Actions aimed at strengthening the attraction, retention, and return of talent in the Galician ICT sector will be promoted, encouraging emigrants to return to Galicia and professionals from abroad to join the workforce.

Axis 4: Improvement of ICT infrastructure and promotion of ICT land

Infrastructure and industrial land

IF1 Foster the development of the ICT City and connect it with priority initiatives for the deployment of technologies and innovative companies

The development of the ICT City and its integration with the ICT hubs of Santiago de Compostela, Vigo, and Ourense will be fostered.

IF2 Improve broadband connectivity and ultra-fast networks throughout Galicia

The development of the communication networks needed to guarantee technological deployment throughout the Galician territory will be fostered, with a particular focus on rural areas.

IF3 Deploy new R&D&I infrastructures

The development of new scientific and technological infrastructures will be promoted in strategic areas such as semi-conductors, satellite communications, cybersecurity, and applied artificial intelligence.

Axis 5: Digital ecosystem

Sectoral digitalisation

D1 Develop digital transformation platforms for all economic sectors, with special emphasis on artificial intelligence

The digital transformation of Galicia's productive sectors will be accelerated through sectoral platforms, specialised technological demonstrators, and a network of sectoral FactorIA facilities, as well as an open algorithm cloud serving the ICT business fabric and other sectors.

D2 Leadership of the Xunta de Galicia in digital best practices and ICT innovation

The Galician public administration will continue to play a driving role in digital innovation, acting as a benchmark and demonstrator of technological solutions developed in Galicia. In addition, an artificial intelligence programme applied to the administration will be deployed, and the Galicia Public Data Management Strategy will be drawn up.

Axis 6: New governance

G1 Joint coordination and monitoring to promote the growth of the Galician ICT sector as an integrated multi-stakeholder and multisector ecosystem

Stable coordination and monitoring mechanisms will be established between the Xunta de Galicia, the ICT sector, clusters, associations, and social stakeholders.

G2 Evaluation of the Master Plan

The industrial map of Galicia will be used as a complementary tool for analysis, consultation, and impact measurement, together with a monitoring system based on indicators, dashboards, and biennial reports.

G3 Intervention criteria

Projects with a high impact on investment and employment will be prioritised through the Regional Plan for the promotion and acceleration of industrial projects and strategic industrial projects. Likewise, women's entry into the industry will be promoted, and industrial safety and occupational health measures will be strengthened.

G4 Communication and dissemination to make the Galician ICT value chain visible

A communication strategy will be promoted to publicise the Master Plan and increase the visibility of the Galician ICT value chain, both externally (within the industrial fabric and society in general) and internally (between departments of the Xunta de Galicia).

11. Economic and financial framework and planning

The Master Plan’s economic-financial framework and planning lay **the financial and organisational groundwork for implementing measures to boost the competitiveness** of Galicia’s ICT sector.

The only annual budget allocation that can be considered definitive under this Master Plan is that for 2026, which, after applying the weighting set out in the plan, amounts to approximately EUR 20.6 million. Assuming that the final allocations for 2027 and 2028 will be of a similar order of magnitude, the Xunta de Galicia expects to mobilise around EUR 61.8 million for the implementation of the measures included in the ICT Industry Master Plan 2026-2028.



12. Governance system

The governance system ensures the proper implementation and monitoring of the Master Plan, guaranteeing coordination between the different responsible entities, as well as the active participation of economic and social stakeholders. The Regional Ministry of Economy and Industry of the Xunta de Galicia plays a crucial role in ICT industry governance, ensuring the promotion and dynamisation of the economy and industrial policy. Its responsibilities include coordinating economic and industrial policies, supporting business competitiveness, and promoting technological and sustainable development.

Direction and leadership of the plan	The General Secretariat for Industry and Energy Development, through the Directorate-General for Industrial Strategy and Business Land (DXEISE), with the support and advice of the Agency for Technological Modernisation of Galicia (AMTEGA), will lead the implementation of the Master Plan, establishing the strategic framework, coordinating the agents involved, and ensuring measure monitoring.
Management and coordination	A working group led by DXEISE and comprising representatives from relevant Xunta departments will coordinate the Master Plan. The group will hold ordinary meetings annually, and extraordinary meetings as needed, to assess the plan’s progress and ensure coordination of public policies.
Stakeholder participation	The plan guarantees the participation of economic and social stakeholders and citizens through open processes and biennial reports, strengthening public-private collaboration and transparency.
Establishment of the Sectoral Commission	These commissions will be made up of DXEISE staff and representatives of the ICT Cluster of Galicia. The Association of Technology Companies of Galicia will participate, together with other entities and companies linked to the sector and, where necessary, representatives of Xunta de Galicia working groups with responsibilities in this area.
Evaluation of measure results	This information, provided by contact persons designated by each implementing department, will be used to adjust and improve ongoing policies.

Biennial results reports will be produced during the Master Plan's implementation. These documents will be presented to the sectoral commissions and to the Social Dialogue Roundtable representatives, as a measure to strengthen public-private collaboration and ensure effective engagement with the productive fabric. They will also be presented to the Galician Council for Economy and Competitiveness.

The implementation of the master plans will be subject to continuous monitoring through the tools and indicators associated with the industrial map of Galicia, an industrial policy instrument integrated into the framework of the sectoral master plans.

Final summary

This executive summary sets out the main elements of the Galicia ICT Industry Master Plan 2026-2028, structured around two strategic objectives, six axes, and eight sectoral priorities that shape the 22 lines of action intended to strengthen the sector's competitiveness and reinforce its role as a pillar of Galicia's digital transformation. The Xunta de Galicia currently has 77 support instruments in place for the plan, and this number is expected to increase during its implementation over the coming years.

The plan sets out a clear, realistic, and consensual roadmap that lays the foundations for anticipating future challenges, strengthening Galicia's ICT ecosystem, and supporting the digital transformation of productive sectors in a global context shaped by artificial intelligence, the data economy, technological sovereignty, sustainability, and the need for specialised talent.

The ICT Industry Master Plan 2026-2028 aims to help Galicia advance as a digital production powerhouse and as an industrial ecosystem strengthened through ICT.

