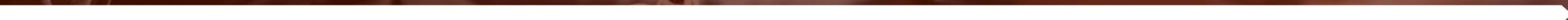


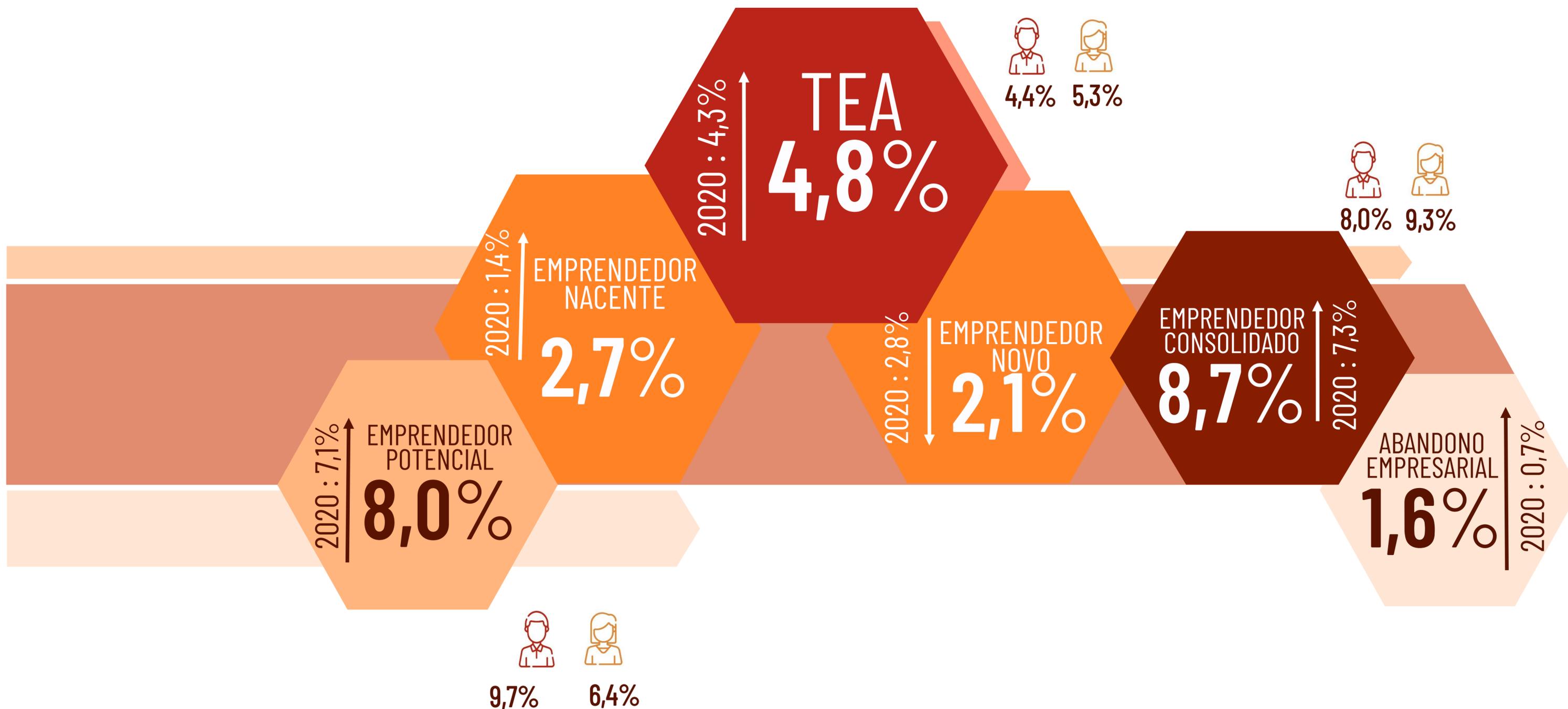
INFORME EXECUTIVO GEM GALICIA 2021 - 2022

ONDE ESTAMOS?

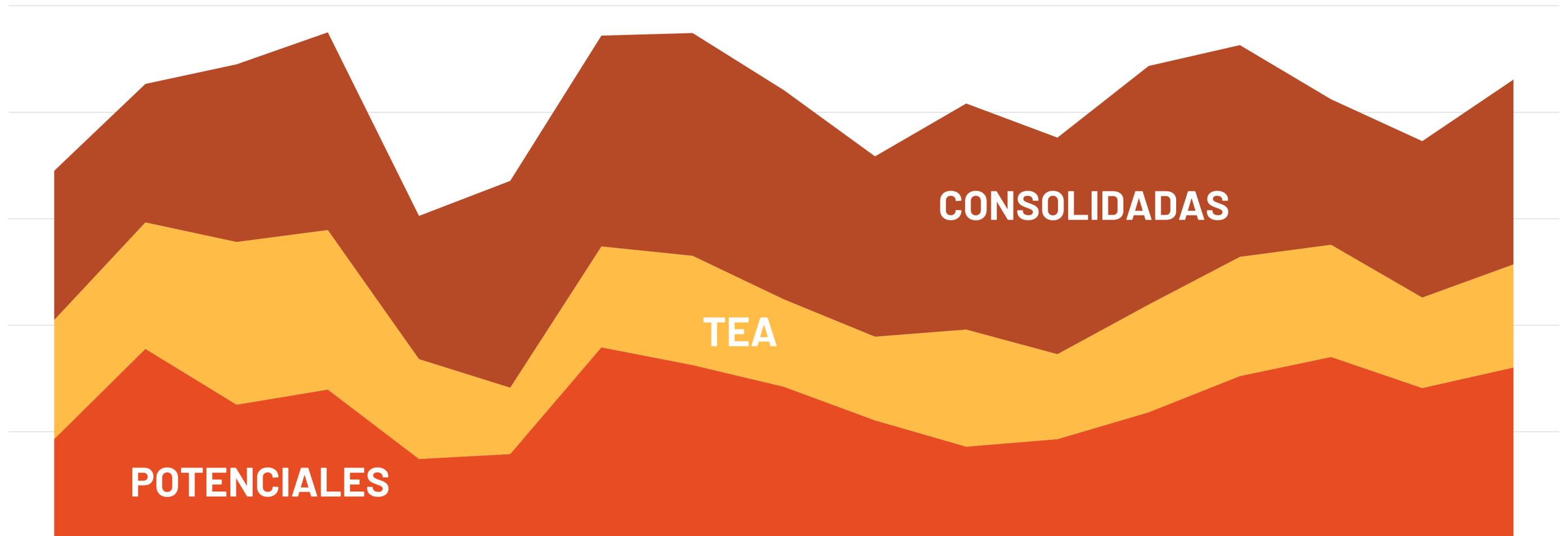


ACTIVIDADE EMPREENDEDORA TOTAL

% POBOACIÓN ADULTA (18-64 ANOS)



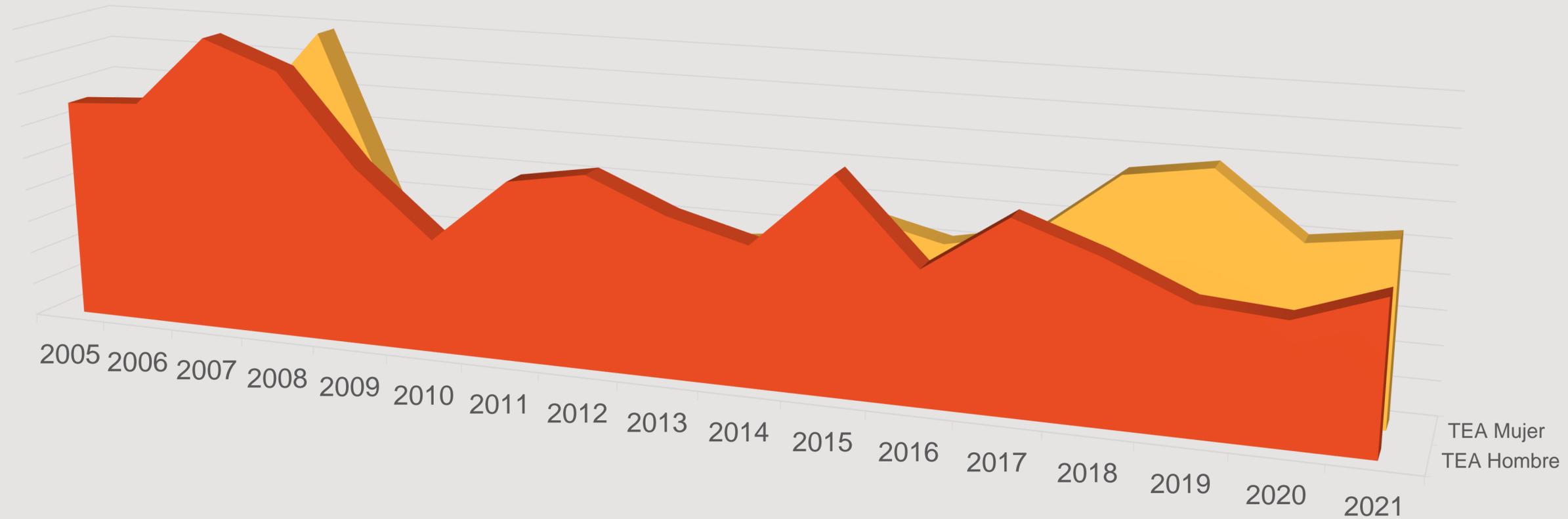
EVOLUCIÓN DO EMPRENDEMENTO



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
■ Consolidadas	7,0%	6,5%	8,3%	9,3%	6,7%	9,7%	9,9%	10,5%	9,8%	8,5%	10,6%	10,2%	11,2%	9,9%	6,8%	7,3%	8,7%
■ TEA	5,6%	5,9%	7,6%	7,5%	4,7%	3,1%	4,7%	5,1%	4,1%	3,9%	5,5%	4,0%	5,1%	5,6%	5,3%	4,3%	4,8%
■ Potenciales	4,7%	8,9%	6,3%	7,0%	3,7%	4,0%	9,0%	8,1%	7,1%	5,5%	4,3%	4,7%	5,9%	7,6%	8,5%	7,1%	8,0%

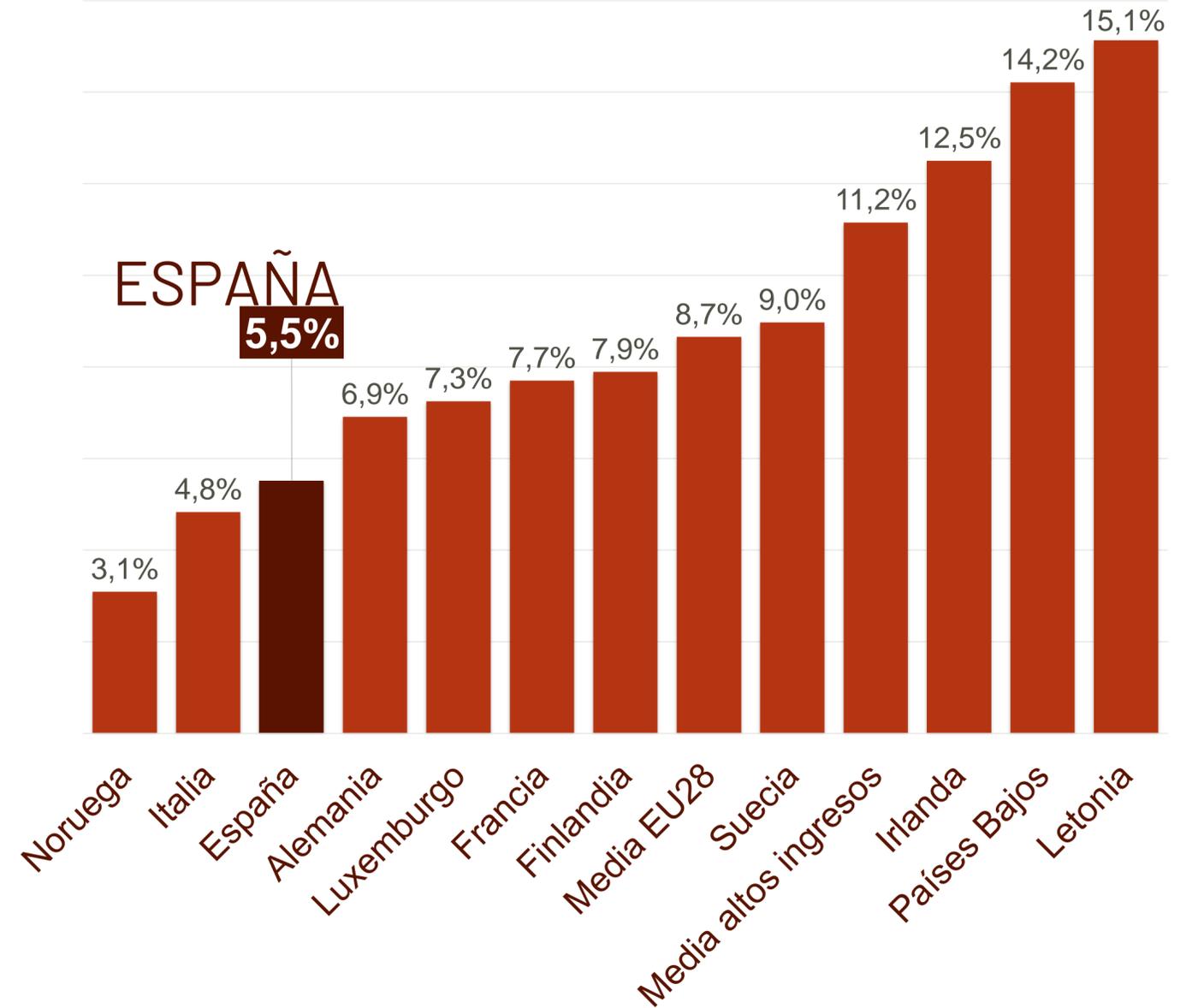
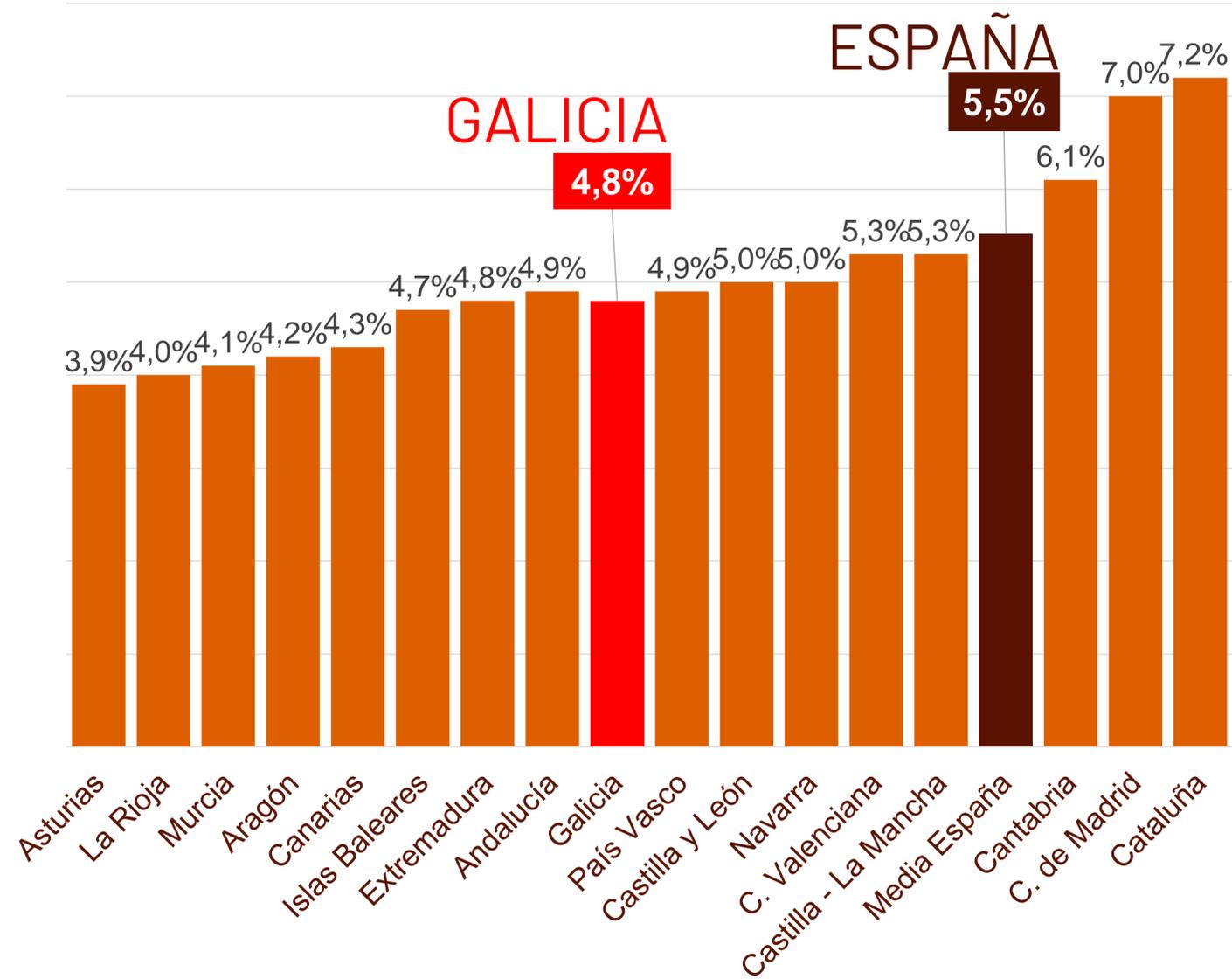
EVOLUCIÓN DO ÍNDICE

TEA EN FUNCIÓN DO SEXO



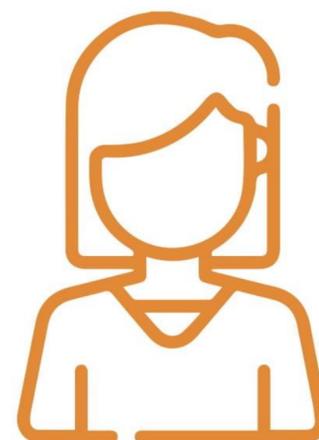
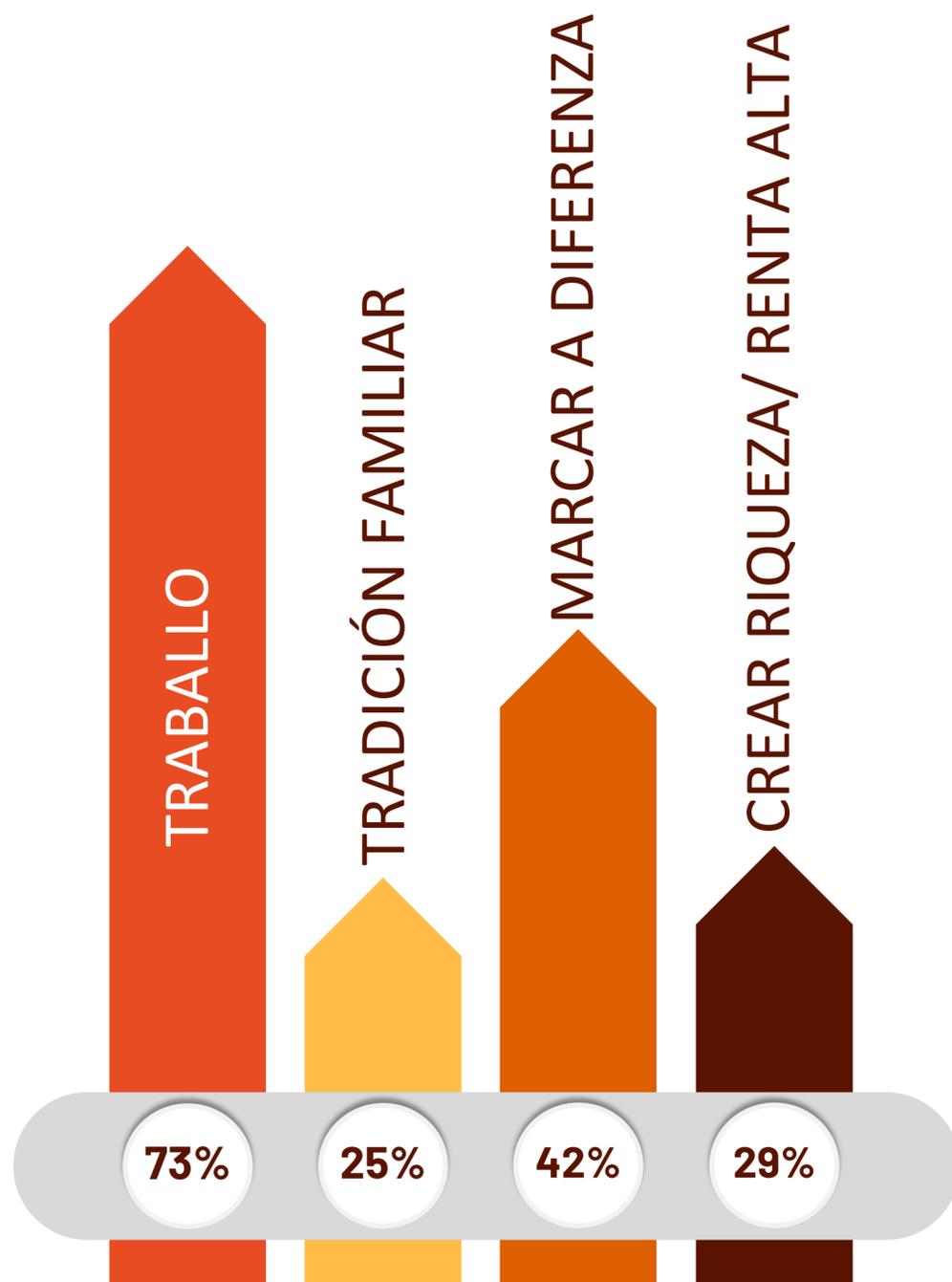
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
■ TEA Hombre	6,7%	6,8%	9,0%	8,1%	5,4%	3,4%	5,4%	5,8%	4,8%	4,2%	6,4%	4,0%	5,6%	4,8%	3,7%	3,5%	4,4%
■ TEA Mujer	4,2%	5,2%	6,3%	8,9%	3,2%	1,9%	4,1%	4,5%	3,4%	3,7%	4,6%	4,0%	4,5%	6,4%	6,8%	5,0%	5,3%

COMPARATIVA TEA

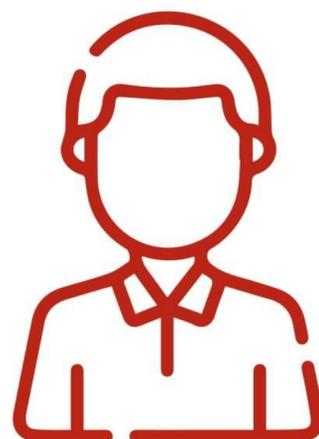


PARA QUÉ EMPRENDEN?

PARA QUÉ EMPRENDEN?



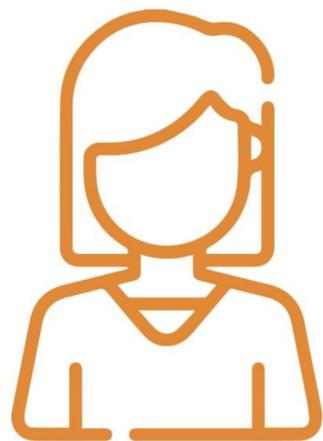
	2020	2021
Marcar unha diferenza no mundo	17%	45%
Crear riqueza ou renda moi alta	25%	23%
Continuar unha tradición familiar	27%	25%
Gañarse a vida porque o traballo escasea	69%	77%



	2020	2021
Marcar unha diferenza no mundo	27%	37%
Crear riqueza ou renda moi alta	35%	37%
Continuar unha tradición familiar	31%	26%
Gañarse a vida porque o traballo escasea	71%	68%

EMPRESAS FAMILIARES

PROPIEDAD FAMILIAR

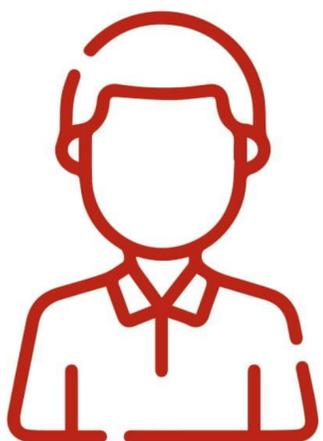


GALICIA

TEA 85%
CONSOLIDADA 94%

ESPAÑA

TEA 49%
CONSOLIDADA 45%



GALICIA

TEA 65%
CONSOLIDADA 85%

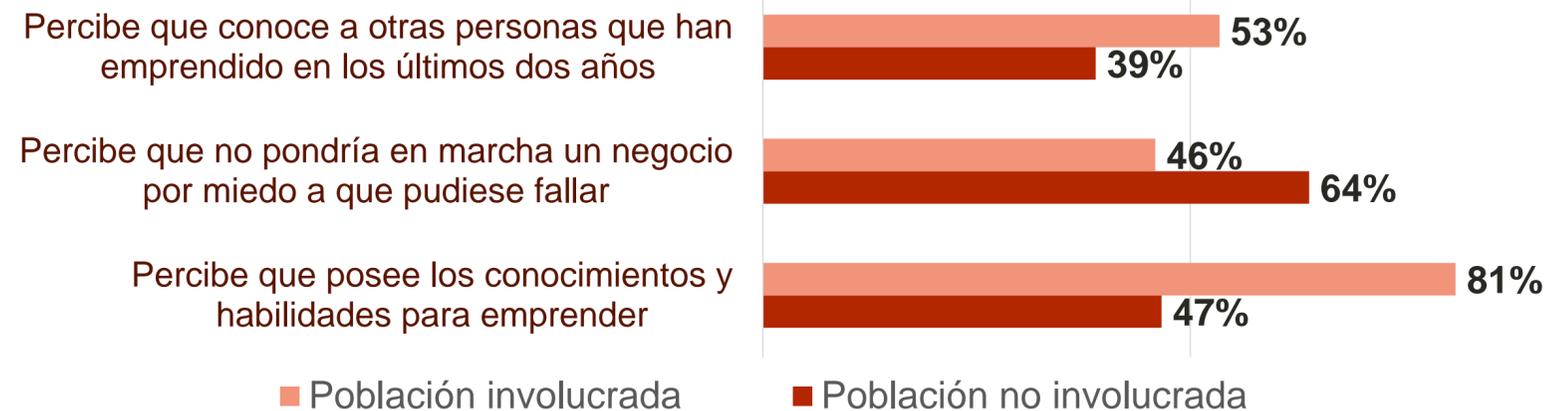
ESPAÑA

TEA 51%
CONSOLIDADA 55%

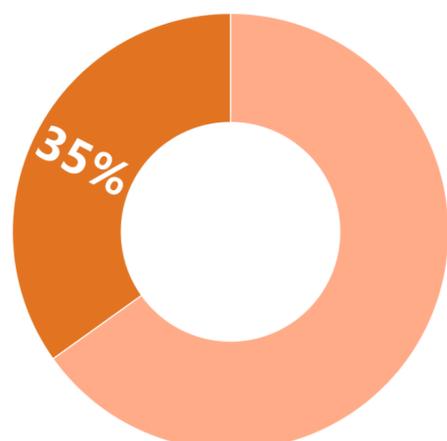
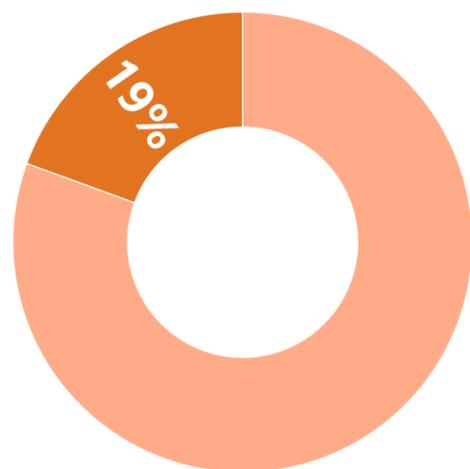
POR QUÉ EMPRENDEN?

PERCEPCIONS DA POBOACIÓN

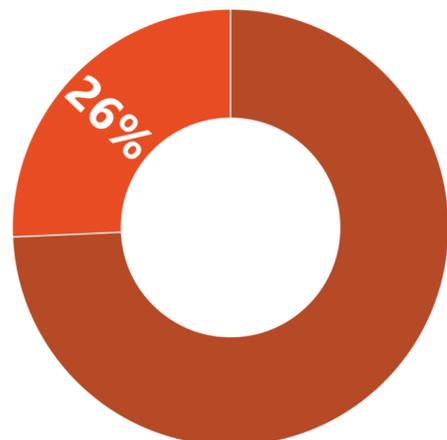
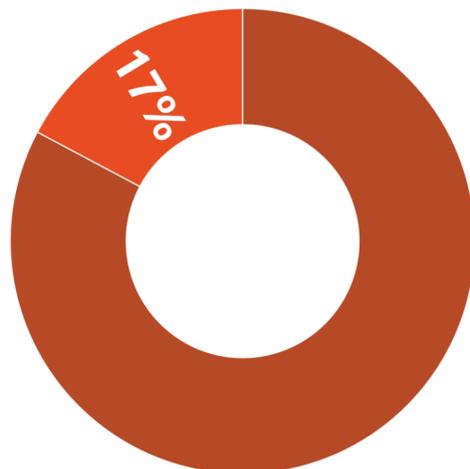
GALEGA SOBRE O EMPRENDEMENTO



PERCEPCIÓN DE OPORTUNIDADES PARA EMPRENDER

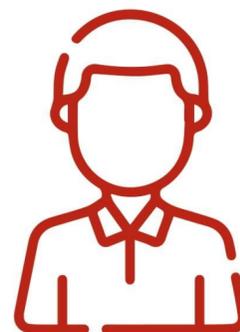
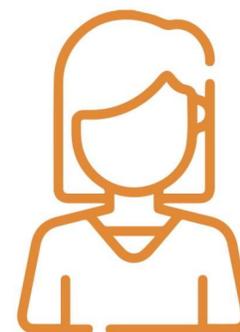


POBLACIÓN INVOLUCRADA (TEA + CONSOLIDADAS)



POBLACIÓN NO INVOLUCRADA

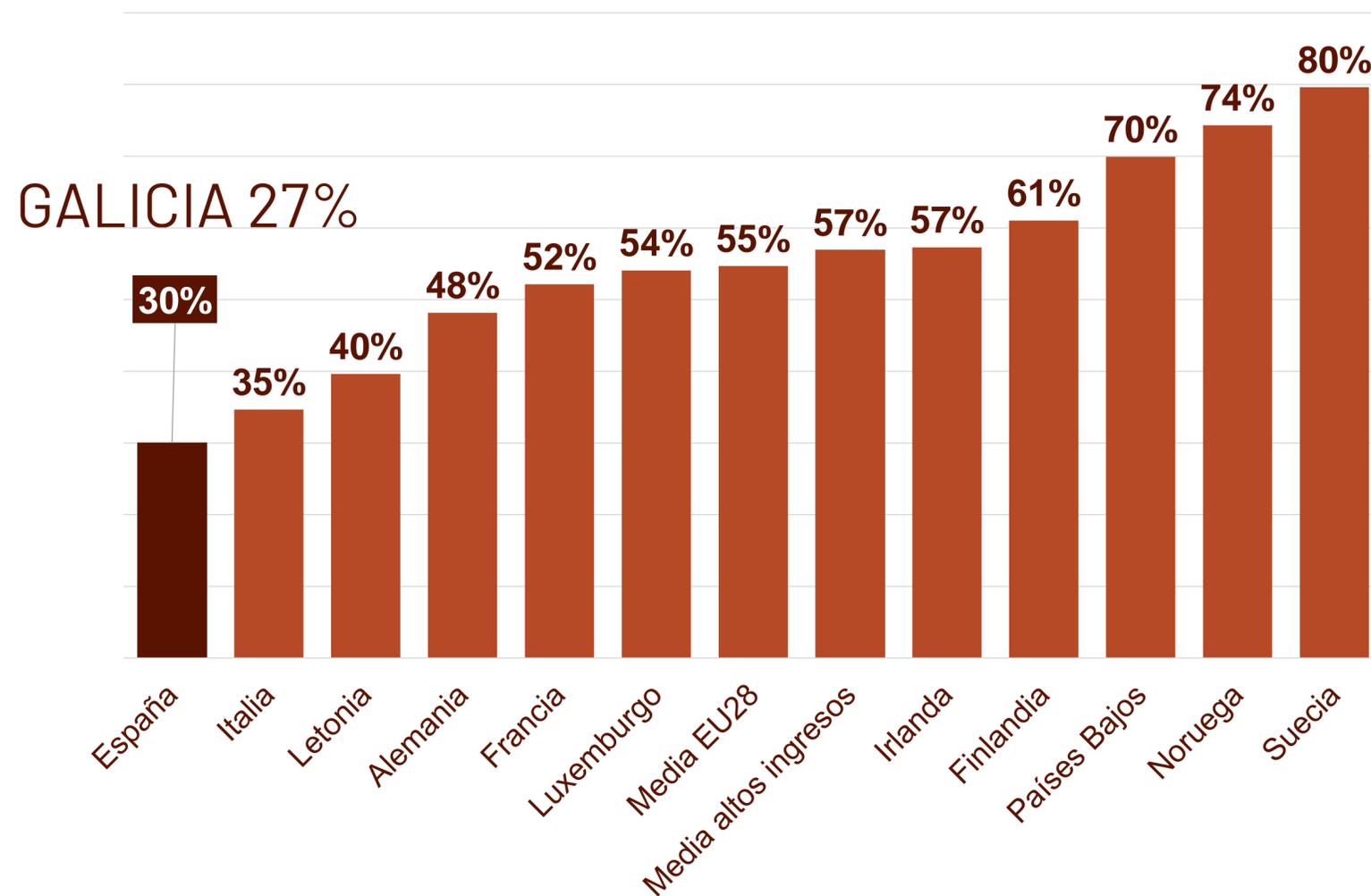
■ POBLACIÓN INVOLUCRADA ■ POBLACIÓN NON INVOLUCRADA



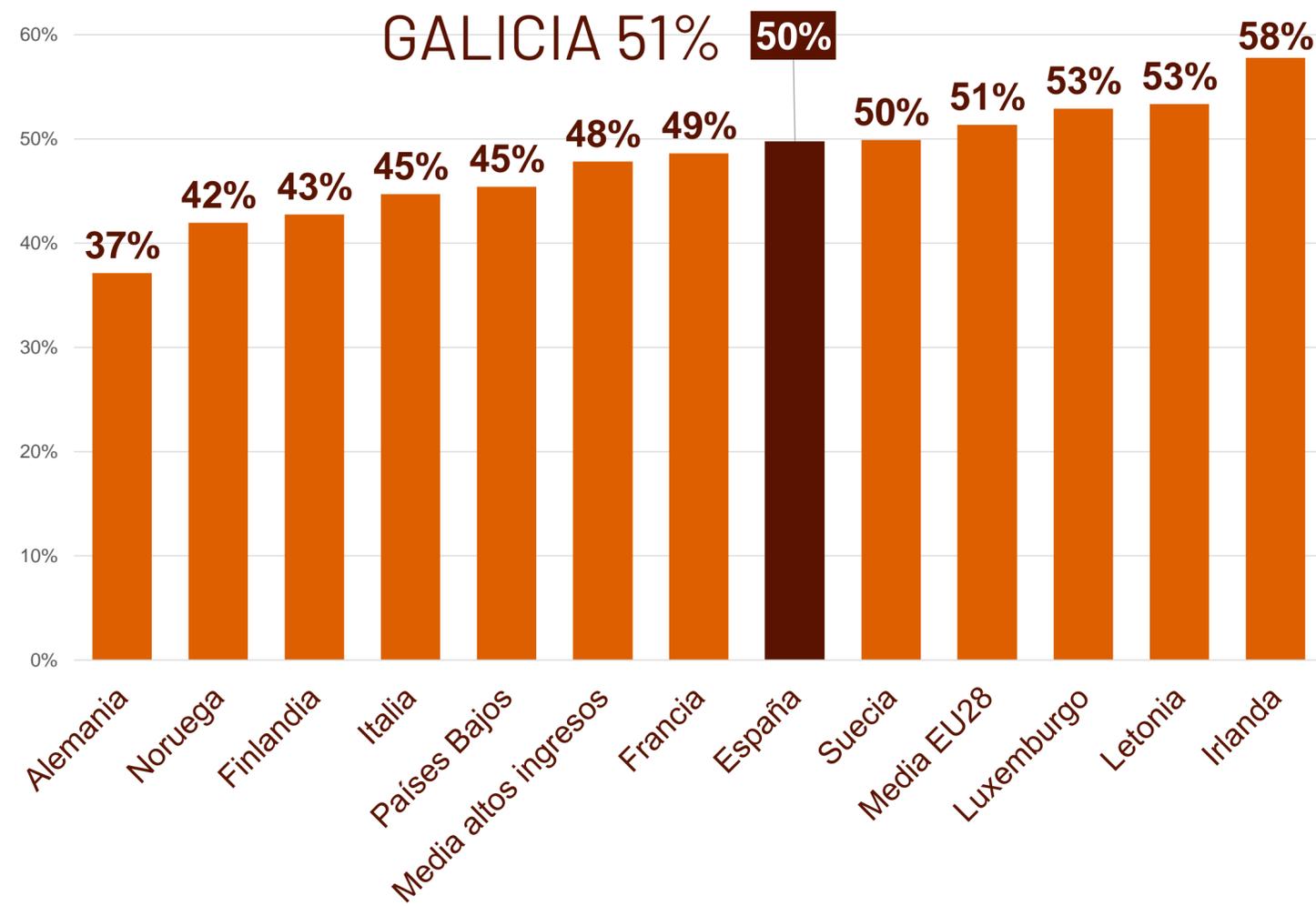
PERCEPCIÓNS DA POBOACIÓN

GALEGA EN XERAL

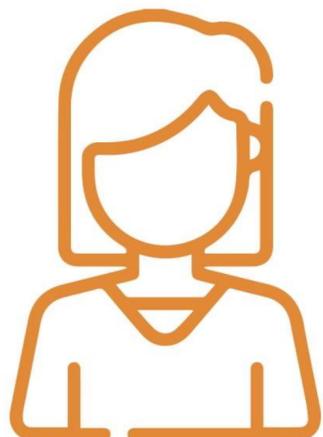
PERCEPCIÓN DE OPORTUNIDADES



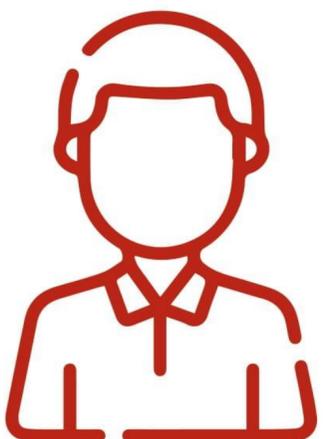
MEDO AO FRACASO COMO OBSTÁCULO PARA EMPRENDER



PERFIL DA PERSOAA EMPREENDEDORA



	2020	2021
18-34	20%	29%
35-44	32%	27%
45- 65	48%	44%



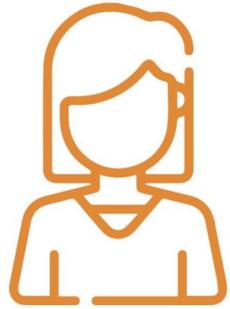
	2020	2021
18-34	31%	27%
35-44	17%	16%
45- 65	52%	57%

IDADE

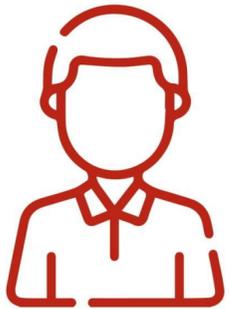


EDUCACIÓN

EDUCACIÓN



	Potencial	TEA	Consolidada
Primaria	40%	31%	42%
Secundaria	24%	22%	24%
FP Superior	8%	21%	15%
Univeritaria	28%	26%	19%



	Potencial	TEA	Consolidada
Primaria	30%	25%	32%
Secundaria	15%	18%	22%
FP Superior	21%	25%	13%
Univeritaria	34%	32%	33%

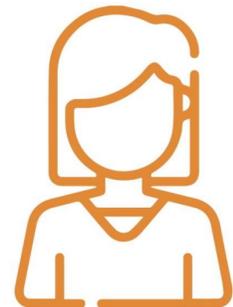


Educación	Potencial	TEA	Consolidada
Primaria	34%	28%	37%
Secundaria	19%	20%	23%
FP Superior	16%	23%	14%
Universitaria	31%	29%	26%

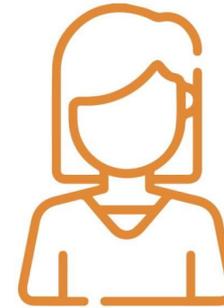
Futuro?

PERCEPCIÓN

FORMACIÓN ESPECÍFICA PARA EMPRENDER

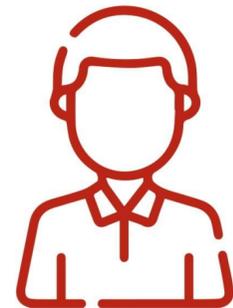


	TEA	Consolidada
Baixo	40%	43%
Medio	33%	32%
Alto	27%	25%

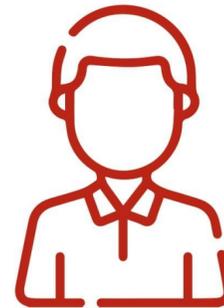


NIVEL DE COÑECEMENTOS FINANCIEROS AUTO PERCIBIDOS

	TEA	Consolidada
Baixo	31%	47%
Medio	55%	46%
Alto	14%	7%

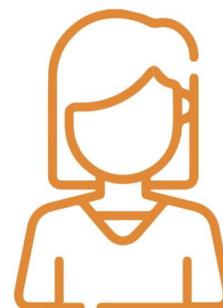
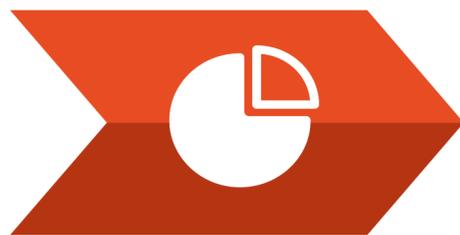


	TEA	Consolidada
Baixo	28%	46%
Medio	16%	24%
Alto	56%	30%

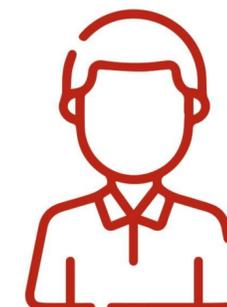


	TEA	Consolidada
Baixo	18%	44%
Medio	59%	44%
Alto	23%	13%

RESULTADO

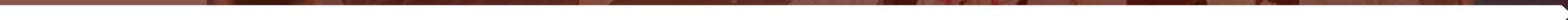


	2021
RENDA INFERIOR	47%
RENDA MEDIA	19%
RENDA SUPERIOR	34%



	2021
RENDA INFERIOR	35%
RENDA MEDIA	24%
RENDA SUPERIOR	41%

CÓMO SON AS INICIATIVAS?



SECTOR DE ACTIVIDADE



Servicios al consumidor
53%

Servicios a empresas
21%

Transformador
13%

Extractivo
13%



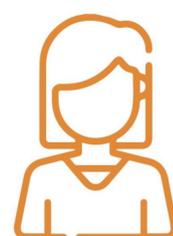
Servicios al consumidor
35%

Servicios a empresas
37%

Transformador
23%

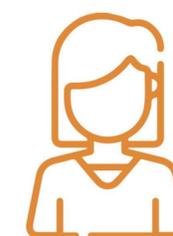
Extractivo
5%

EMPREGADOS



	TEA	TEA
SIN EMPREGADOS	51%	25%
1-5 EMPREGADOS	49%	67%
6-19 EMPREGADOS		4%
20 OU MAIS EMPREGADOS		4%

EXPECTATIVAS



	TEA	TEA
SIN EMPREGADOS	26%	28%
1-5 EMPREGADOS	54%	58%
6-19 EMPREGADOS	18%	11%
20 OU MAIS EMPREGADOS	2%	3%

VALOR	ULTIMO	DIF	%	VALOR	ULTIMO	DIF	%
IBEX MEDIUM CAP				IBEX SMALL CAP			
ACC.ENER	36.940	0.1		AUDAX	1.340	0.0	
APPLUS	6.925	1.8		CASH	0.688	-0.3	
CAF	29.250	2.5		CORREA	5.080	0.0	
COR.ALBA	55.400	0.2		D.FELGUE	0.885	2.0	
DOMINION	3.965	2.9		DEOLEO	0.358	1.1	
EBRO F.	16.360	0.0		DIA	0.013	4.6	
EDREAMS	6.600	8.9		ELECNOE	13.250	-1.1	
FAES	3.985	0.6		ENCE	3.586	-0.4	
FCC	11.160	0.5		ERCROS	3.320	0.0	
GESTAMP	3.500	3.4		EZENTIS	0.150	0.0	
LDA	1.316	0.4		GREENERGY	41.960	2.3	
LOGISTA	18.180	0.6		LAR	5.050	-0.4	
MEDIASET	4.050	0.0		METROVAC	6.970	0.6	
NEINOR	10.960	-0.5		MIQUEL C	12.240	1.5	
PROSEGUR	1.823	0.7		NEOTIL	0.411	0.0	
SACYR	2.692	0.2		ORL	2.380	0.4	
UNICAJA	0.945	0.9		ORYZON	2.380	0.4	
VIDRALA	72.200	0.6		REIG JDF	3.030	0.0	
VISCOFAN	50.200	-0.3		PRISA I	0.577	1.2	



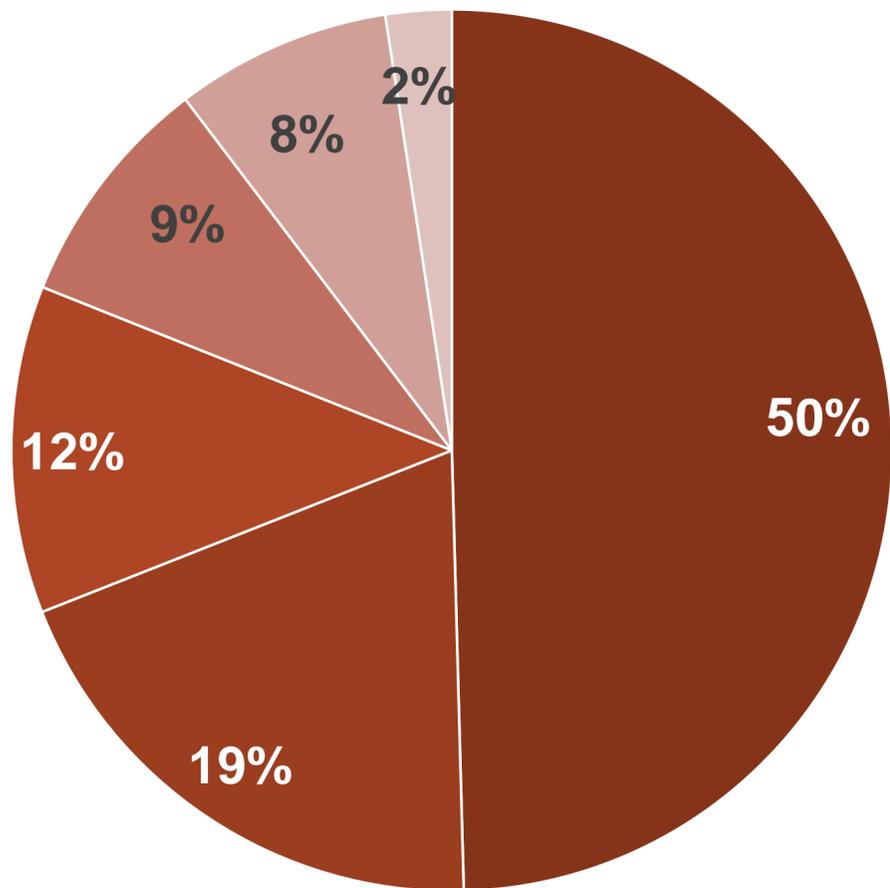
INDICE	ULTIMO	DIF	PTOS	DIF	%
INDICES NACIONALES					
IGBM	879.31	6.12		0.70	
IBEX 35	8826.20	68.55		0.76	
IBEX 35 DIVI	27639.80	8.20		0.29	
IBEX MEDIUM	13261.80	2.00		0.15	
IBEX SMALL	8792.20	42.00		0.49	
IBEX GENDER	9014.90	28.90		0.32	
IBEX 35 BANC	502.20	4.20		0.84	
IBEX 35 ENER	1548.80	-1.10		-0.07	
IBEX 35 CONS	1625.20	11.80		0.73	
IBEX TOP DIV	2804.20	8.40		0.30	
IB GROWTH15					
LATIBEX TOP	6118.40	39.40		0.65	
INTERNACIONALES					
SMI	11491.80	8.20		0.07	
EURO STOXX50	3694.60	16.90		0.46	
DAK	14076.20	68.22		0.49	
CAC 40 PARIS	6328.50	29.30		0.47	
PSI-20	6283.21	98.22		1.60	
FTSE 100 LON	7523.10	0.65		0.00	
FTSE 100	24250.80	374.40		1.57	
DOW JONES	32120.28	191.68		0.60	
S&P 500	3978.20	37.25		0.95	
NASDAQ 100	11943.80	0.00		0.00	
STOXX 50	3611.00	12.40		0.35	
NIKKEI	26604.80	-72.95		-0.27	



CÓMO SE FINANCIAN?

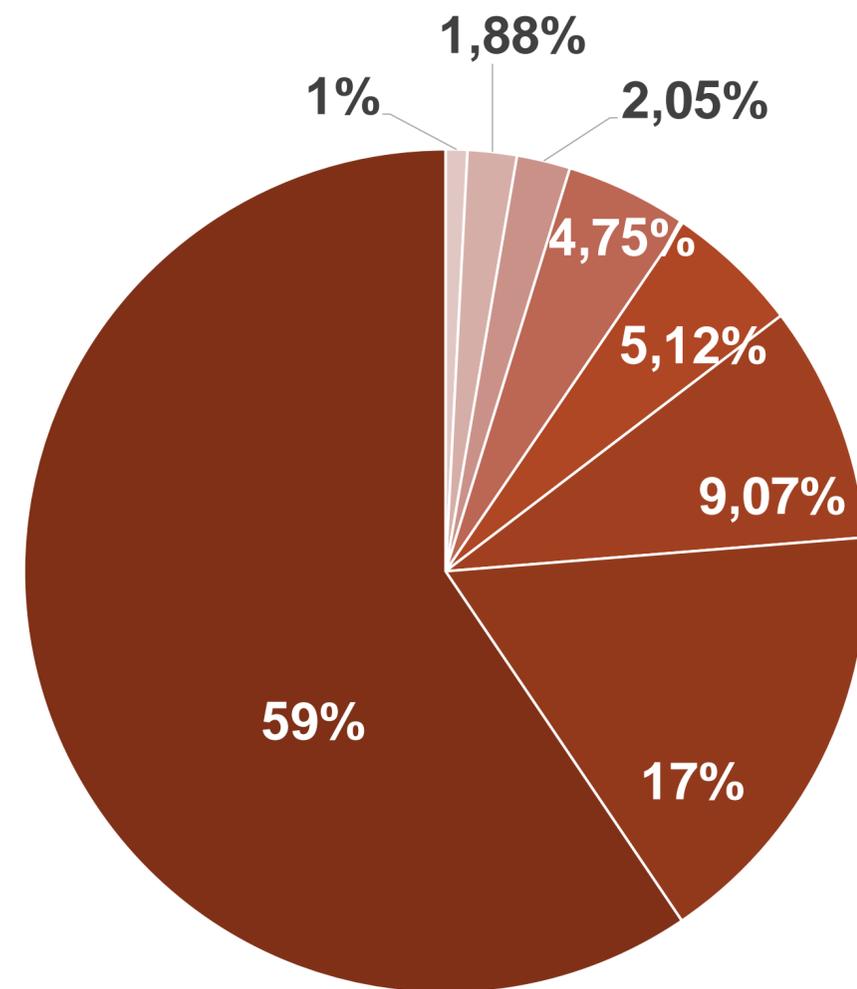
VALOR	ULTIMO	DIF	%	VALOR	ULTIMO	DIF	%
IBEX MEDIUM CAP				IBEX SMALL CAP			
AEDAS H	20.700	0.7		SOLTEC	4.056	3.2	
AIRTIFIC	0.082	0.9		TALGO	3.755	0.4	
AMPER	0.256	0.0		TECNICAS	9.480	-1.0	
ATRESMED	3.842	0.9		TUBACEX	2.430	1.0	
AUDAX	1.205	0.1		TUBOS R	0.337	2.9	





GALICIA

- Ahorros personales
- Instituciones financieras
- Programas públicos
- Familiares
- Otras fuentes
- Amigos



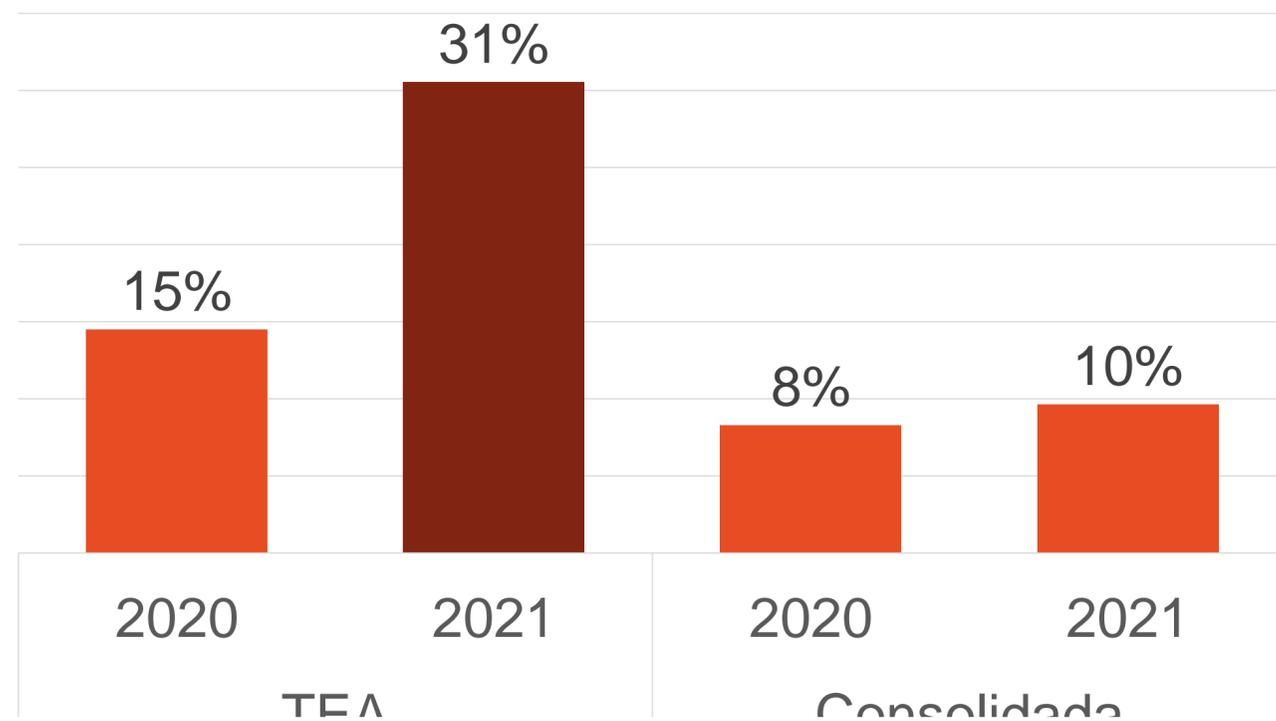
ESPAÑA

- Crowdfunding
- Amigos
- Inversores privados (BAs)
- Programas públicos
- Otras fuentes
- Familiares
- Instituciones financieras
- Ahorros personales

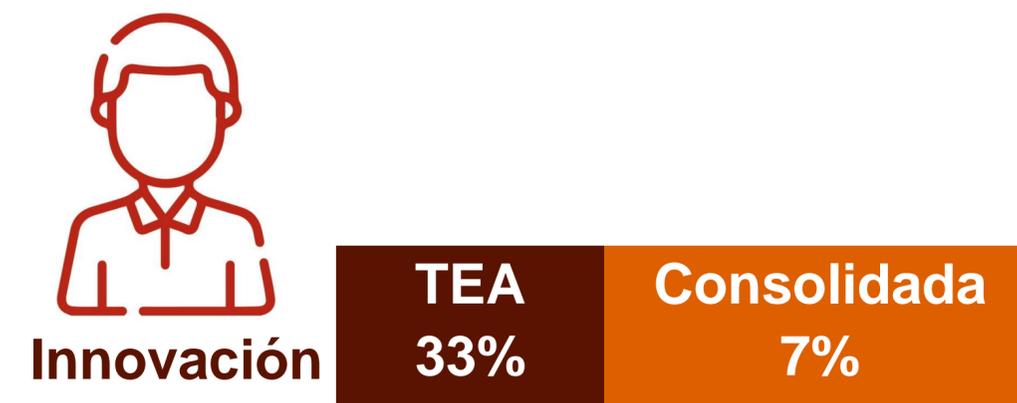
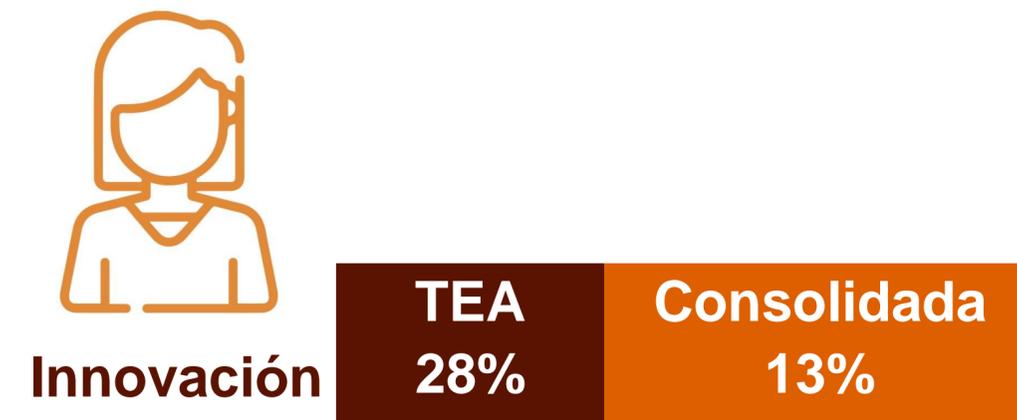
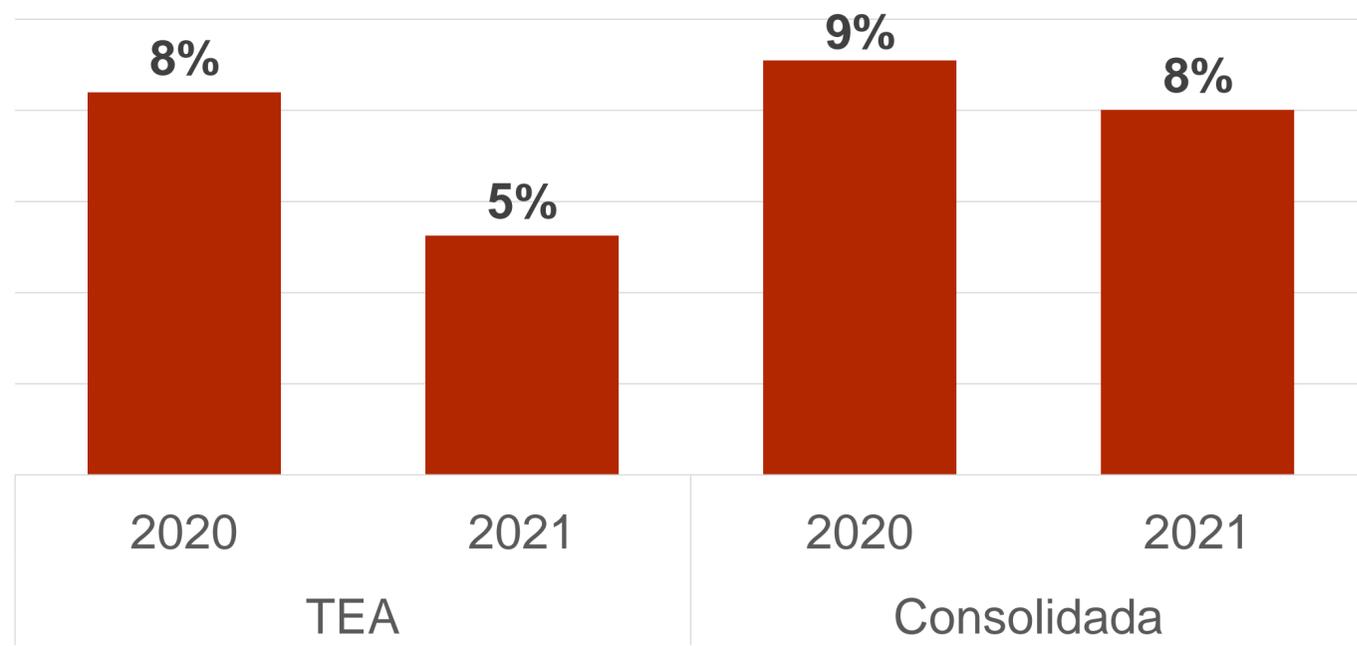


INNOVACIÓN , DIXITALIZACIÓN, INTERNACIONALIZACIÓN

INNOVACIÓN



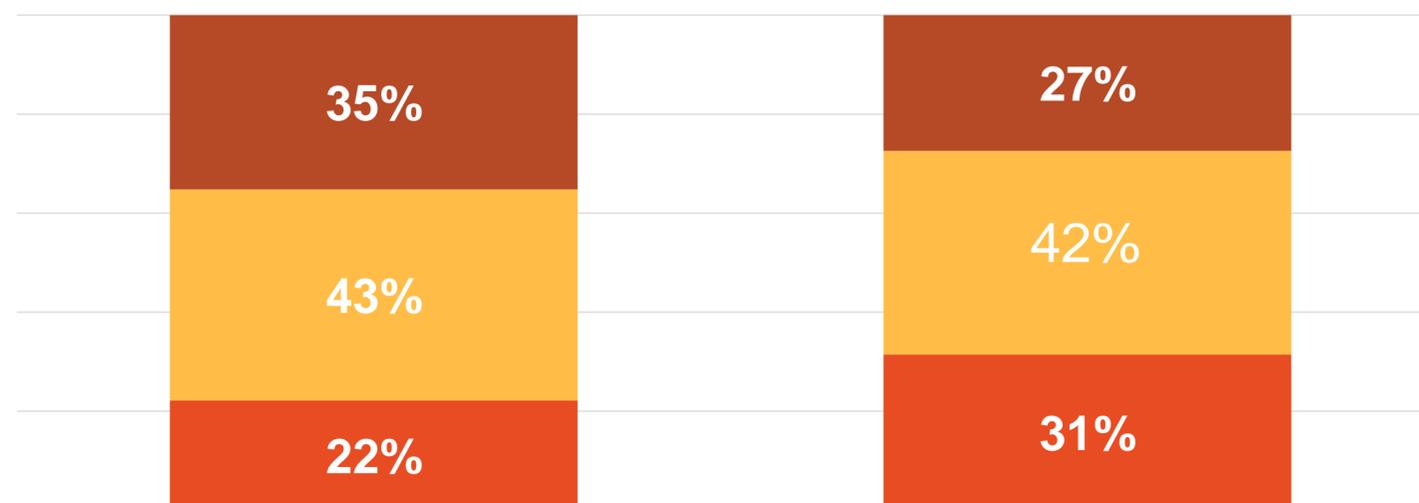
SECTOR CON NIVEL TECNOLÓGICO MEDIO-ALTO



DIXITALIZACIÓN

REALIDADE-RESPOSTA
ACTUAL-PANDEMIA

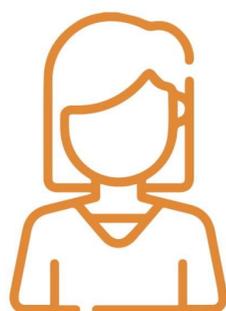
PRESENTE



TEA

Consolidada

- Adopción (debido a la pandemia)
- Adopción (planificado previamente)
- Sin adopción (no necesita)



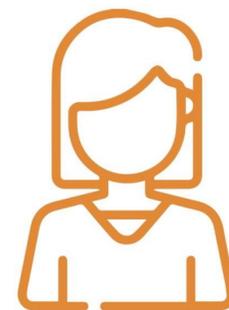
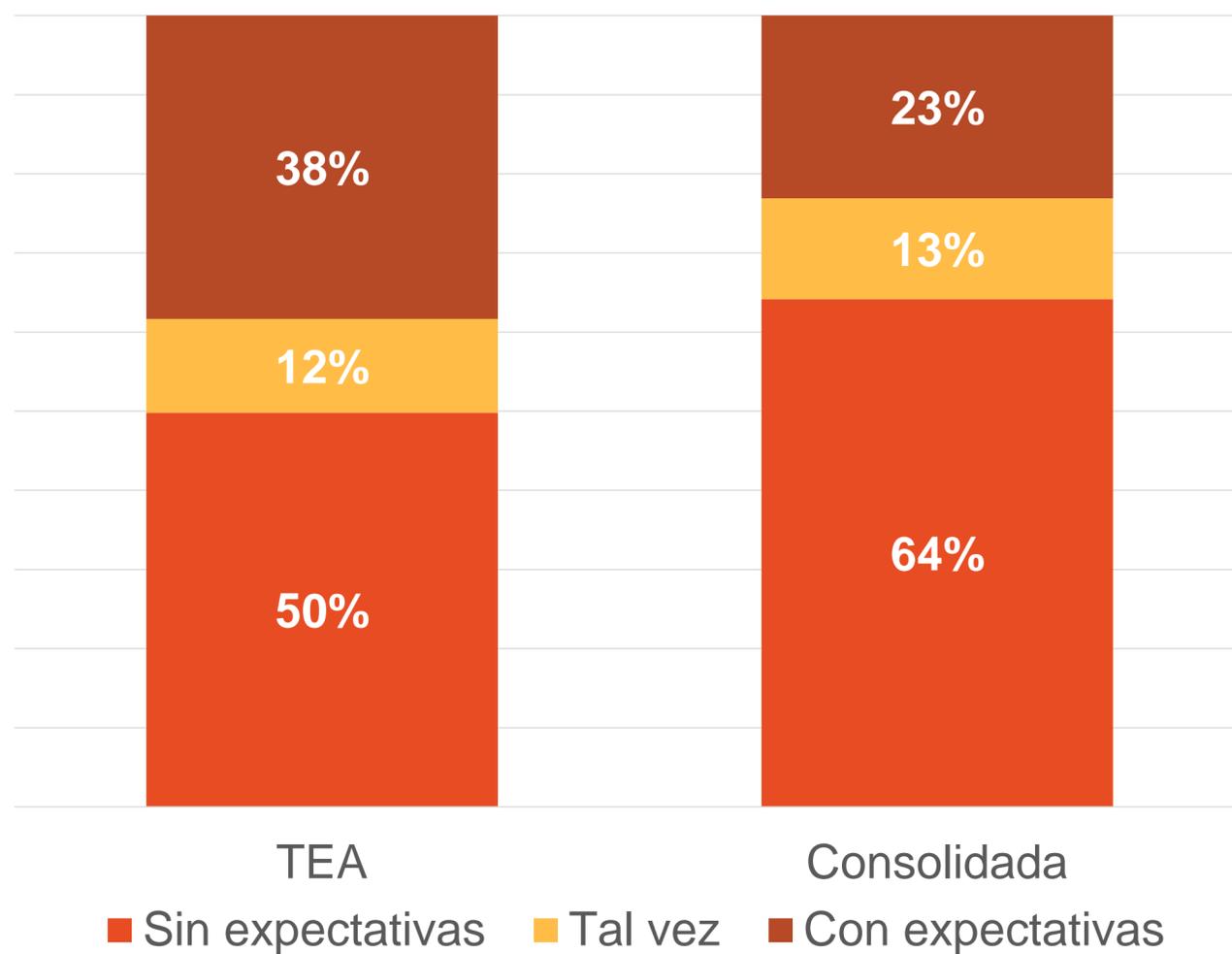
	TEA	Consolidadas
Sin adopción (non precisa)	24%	34%
Adopción (planificado previamente)	38%	43%
Adopción (debido a pandemia)	38%	24%



	TEA	Consolidadas
Sin adopción (non precisa)	20%	28%
Adopción (planificado previamente)	48%	39%
Adopción (debido a pandemia)	32%	32%

DIXITALIZACIÓN: FUTURO

EXPECTATIVAS DE ADOPCIÓN DE TECNOLOGÍAS DIXITAIS

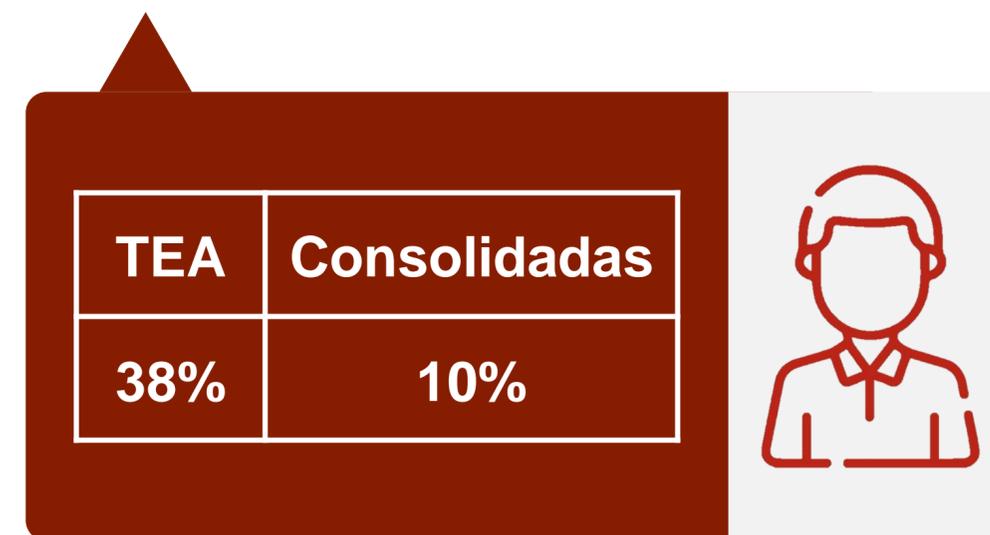
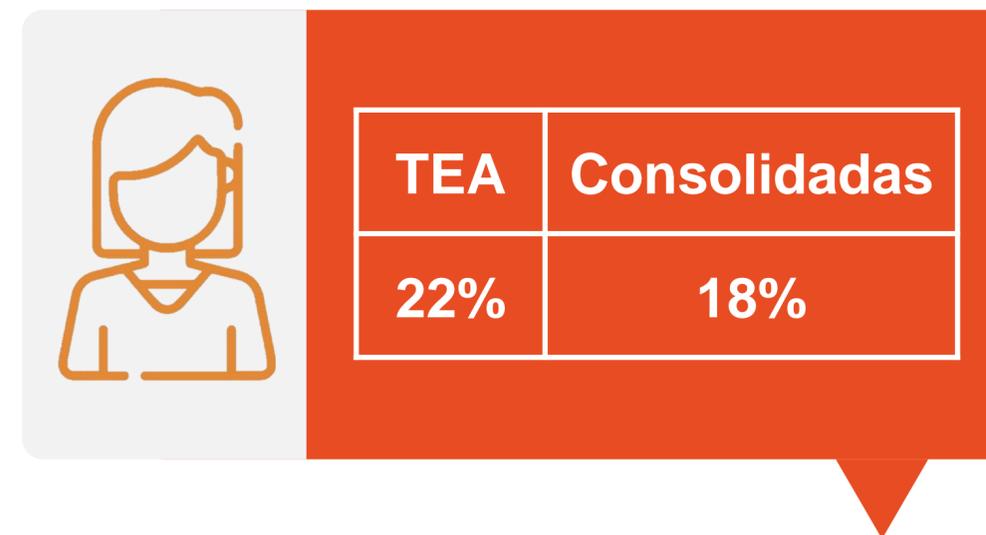
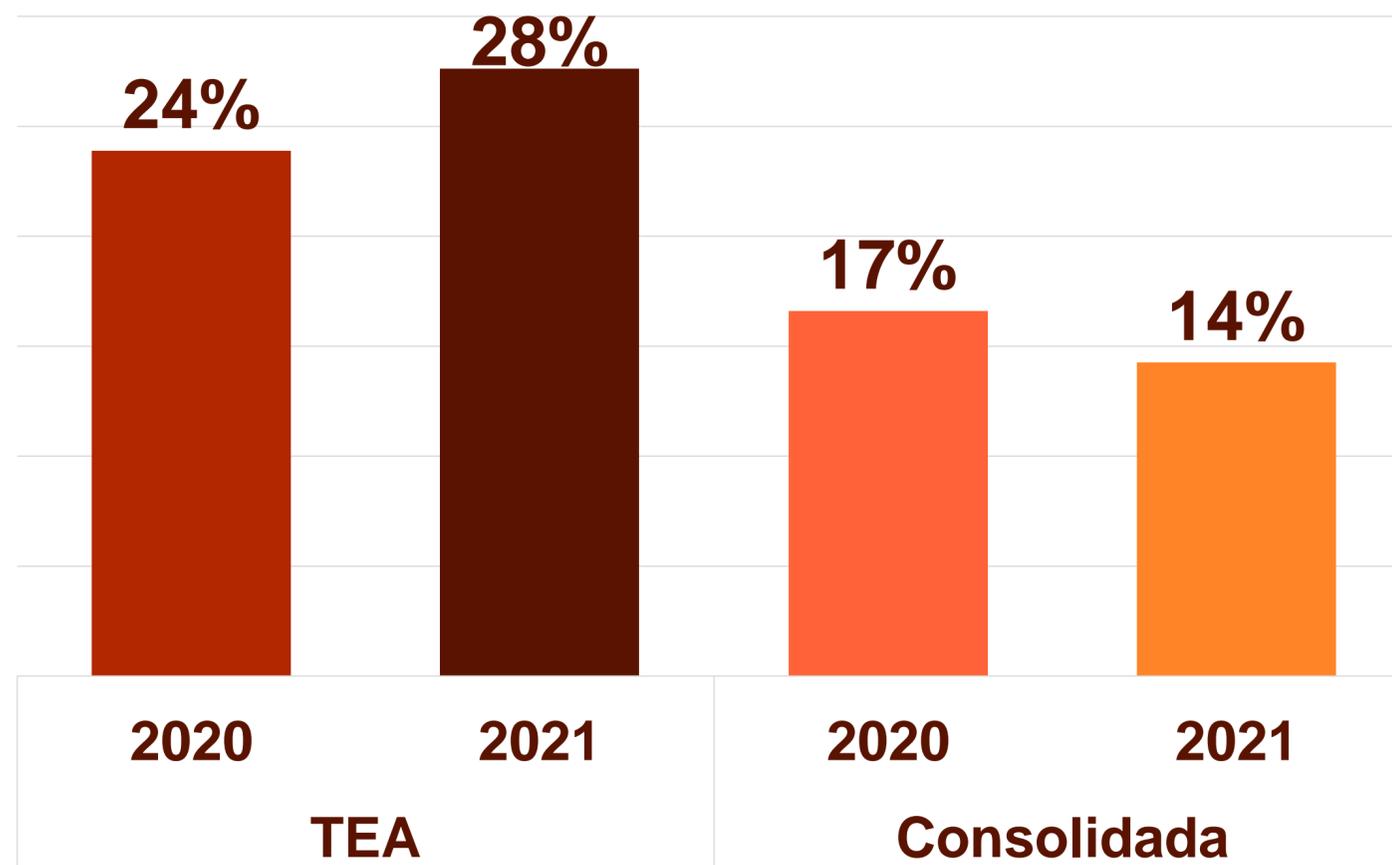


	TEA	Consolidadas
Sin expectativas	60%	68%
Tal vez	12%	14%
Con expectativas	28%	18%



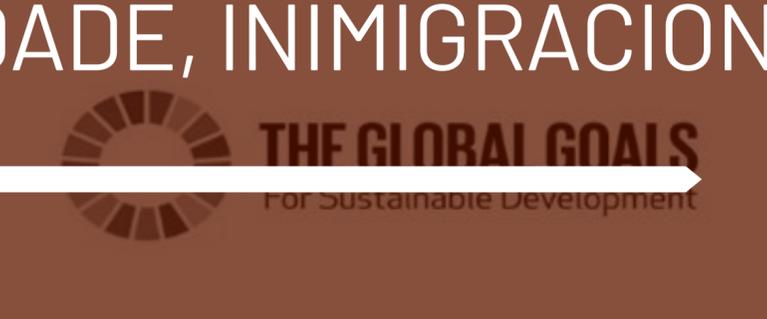
	TEA	Consolidadas
Sin expectativas	39%	58%
Tal vez	11%	12%
Con expectativas	50%	30%

INTERNACIONALIZACIÓN





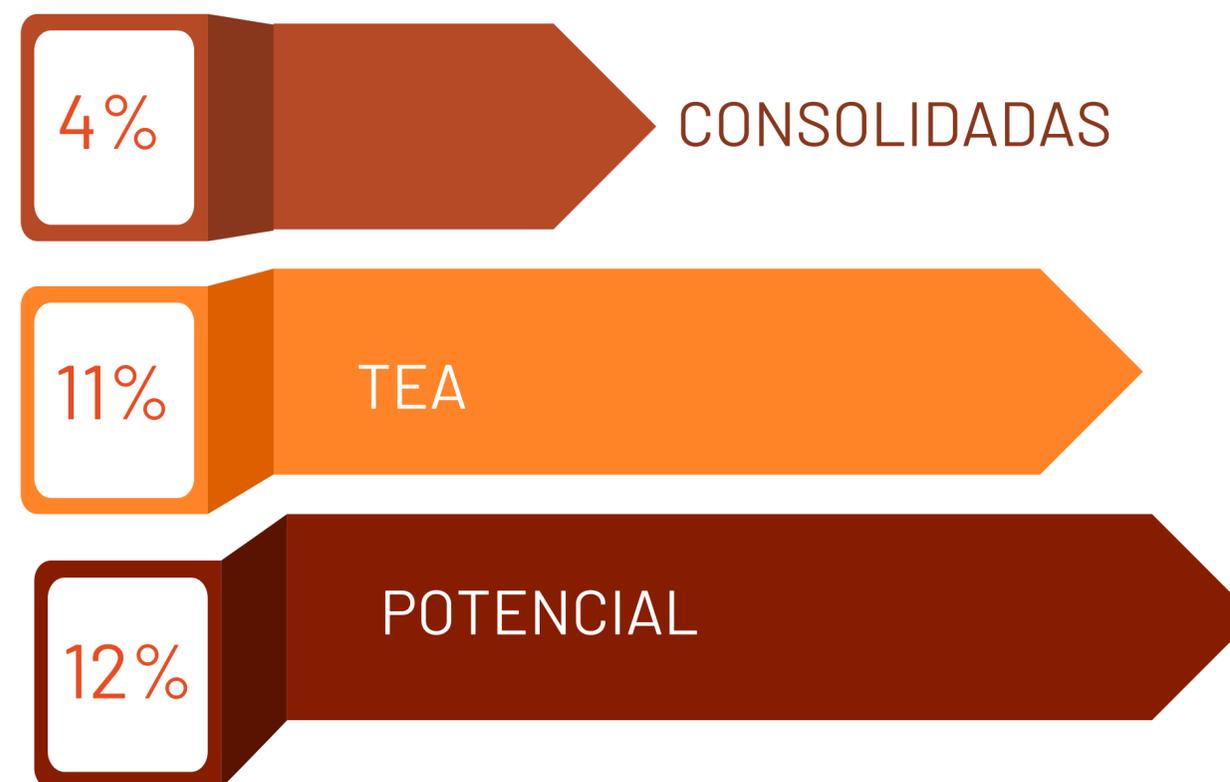
SOSTENIBILIDADE, DISCAPACIDADE, INIMIGRACIÓN



DISCAPACIDADE



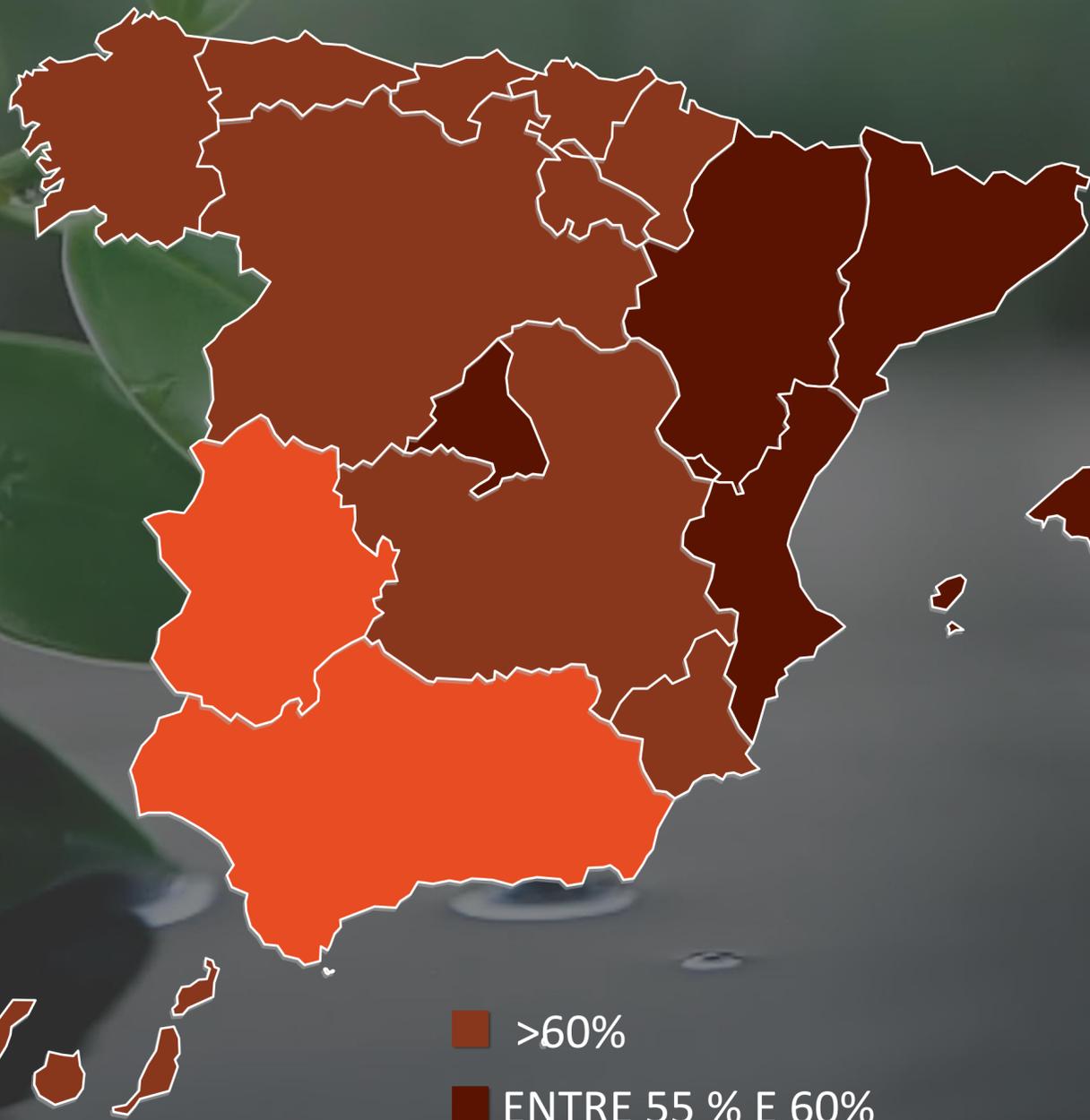
INMIGRACIÓN



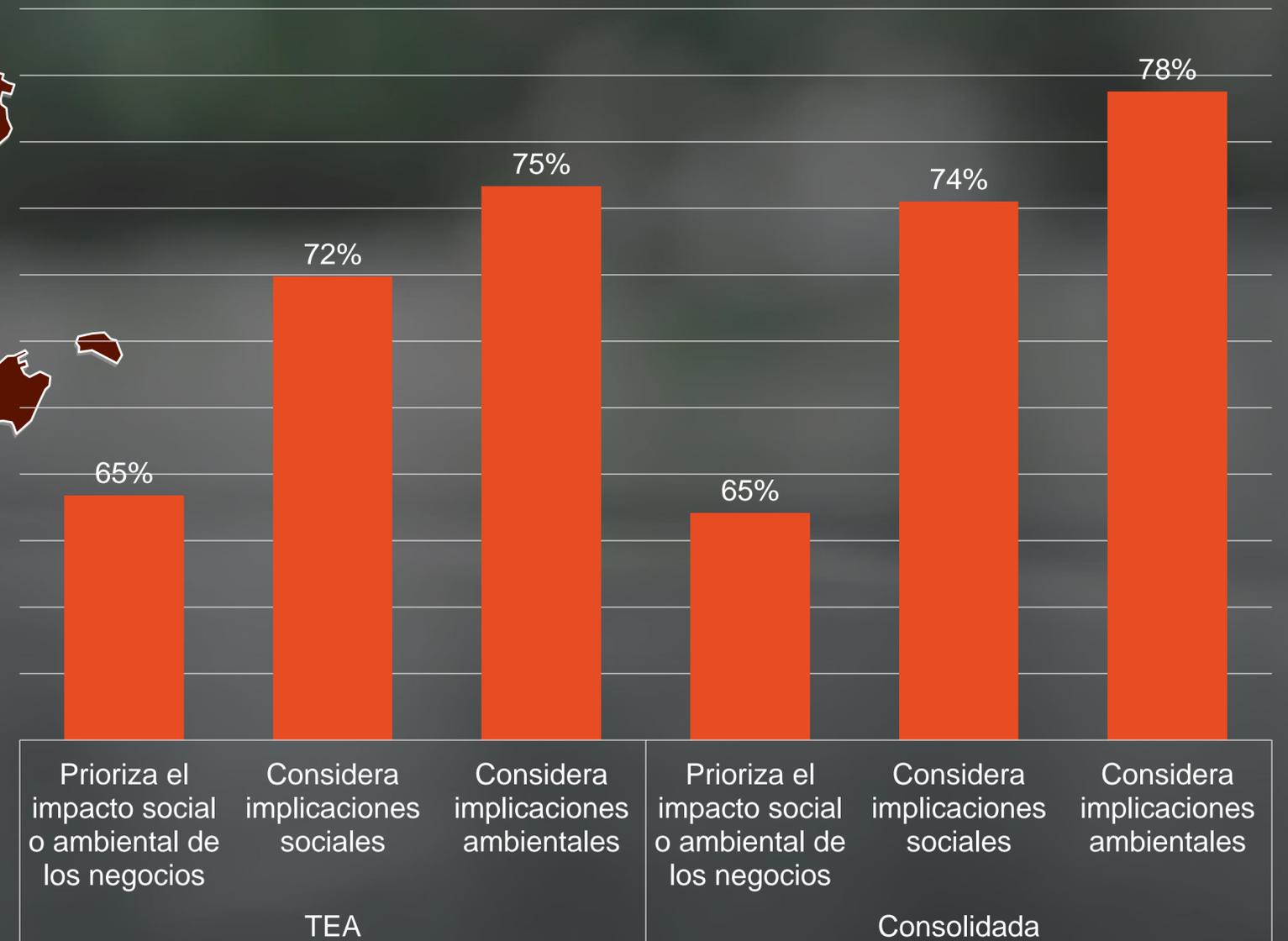
ORIENTACIÓN A SOSTENIBILIDADE

GALICIA

66%



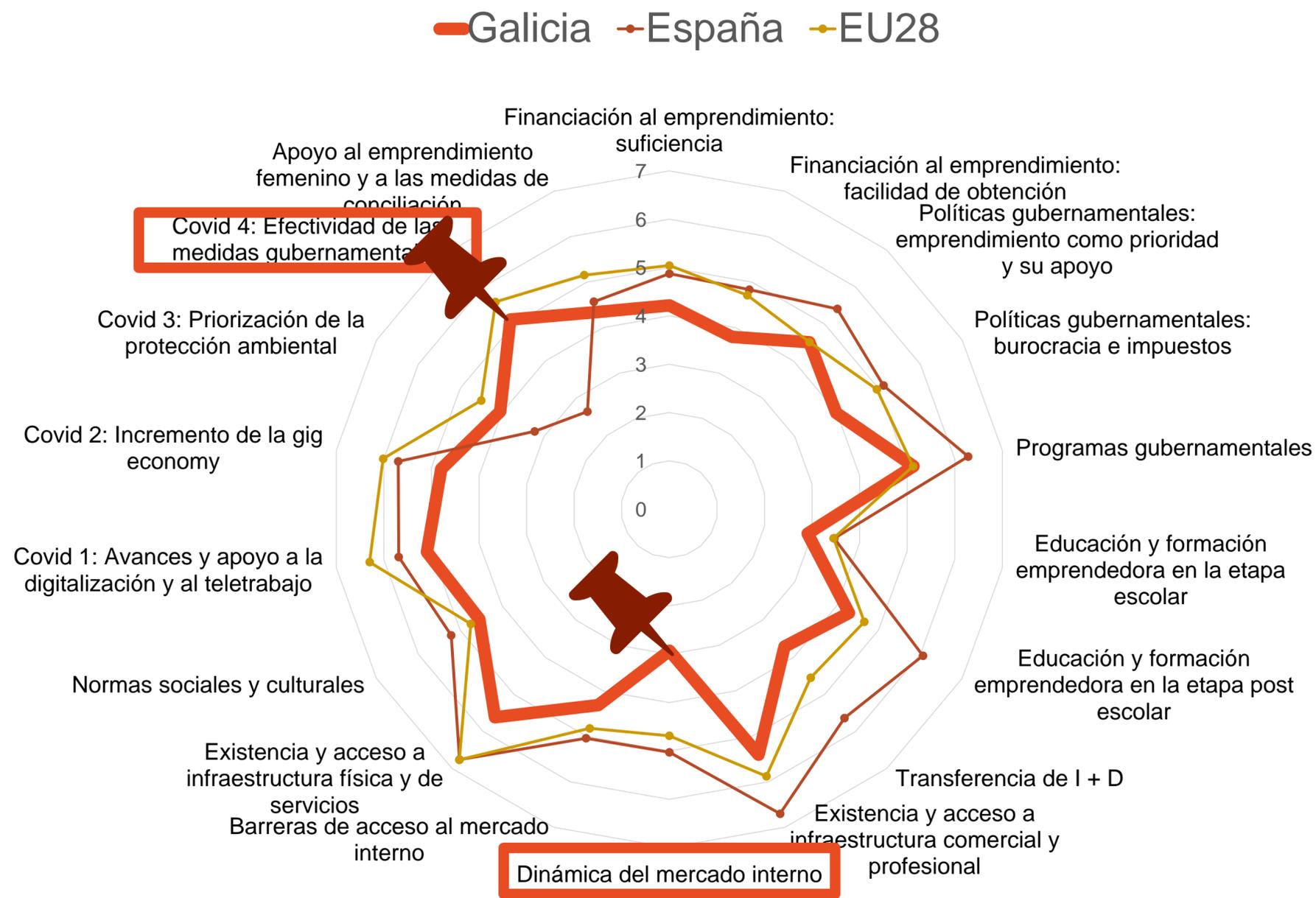
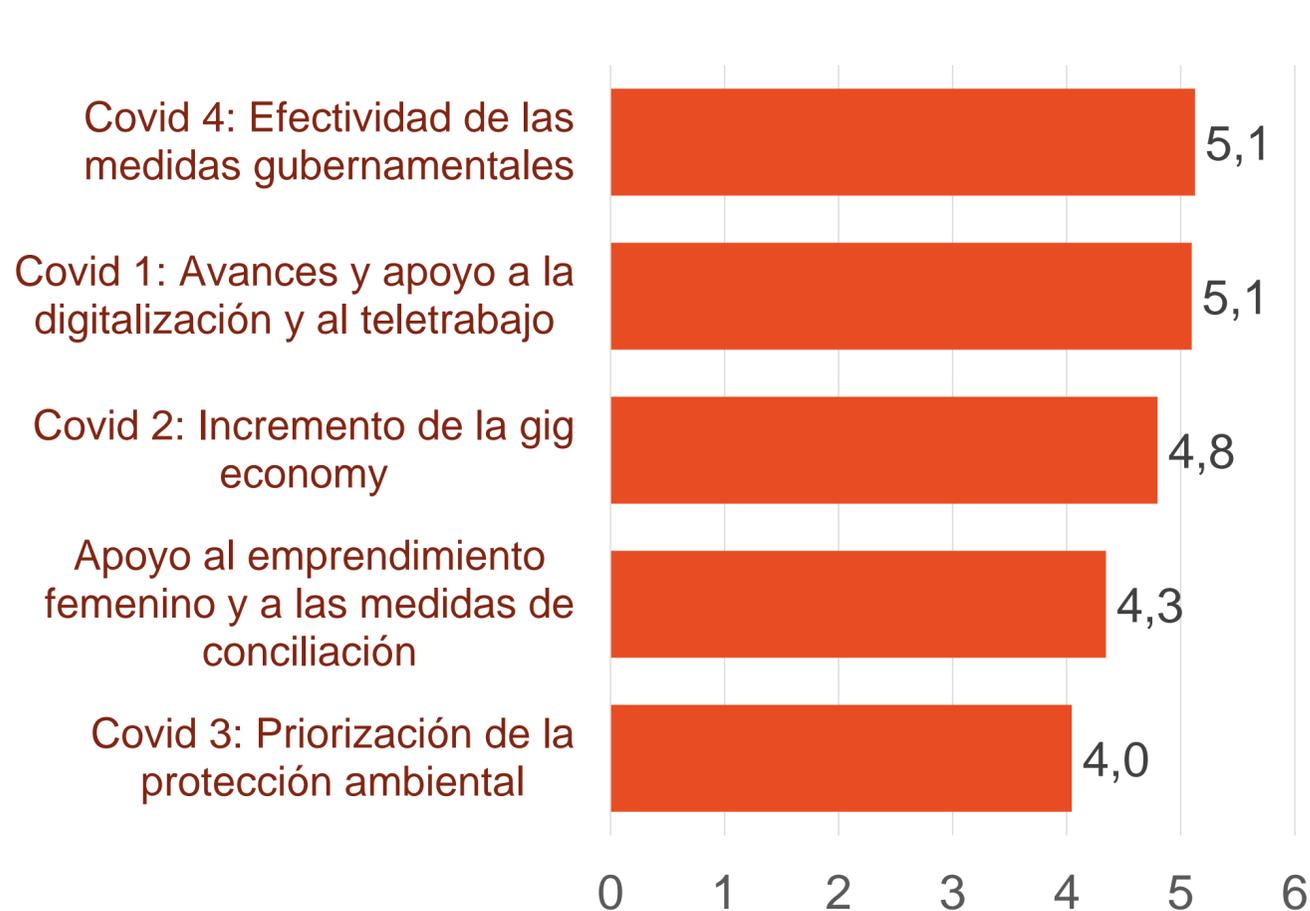
- >60%
- ENTRE 55 % E 60%
- < 55%



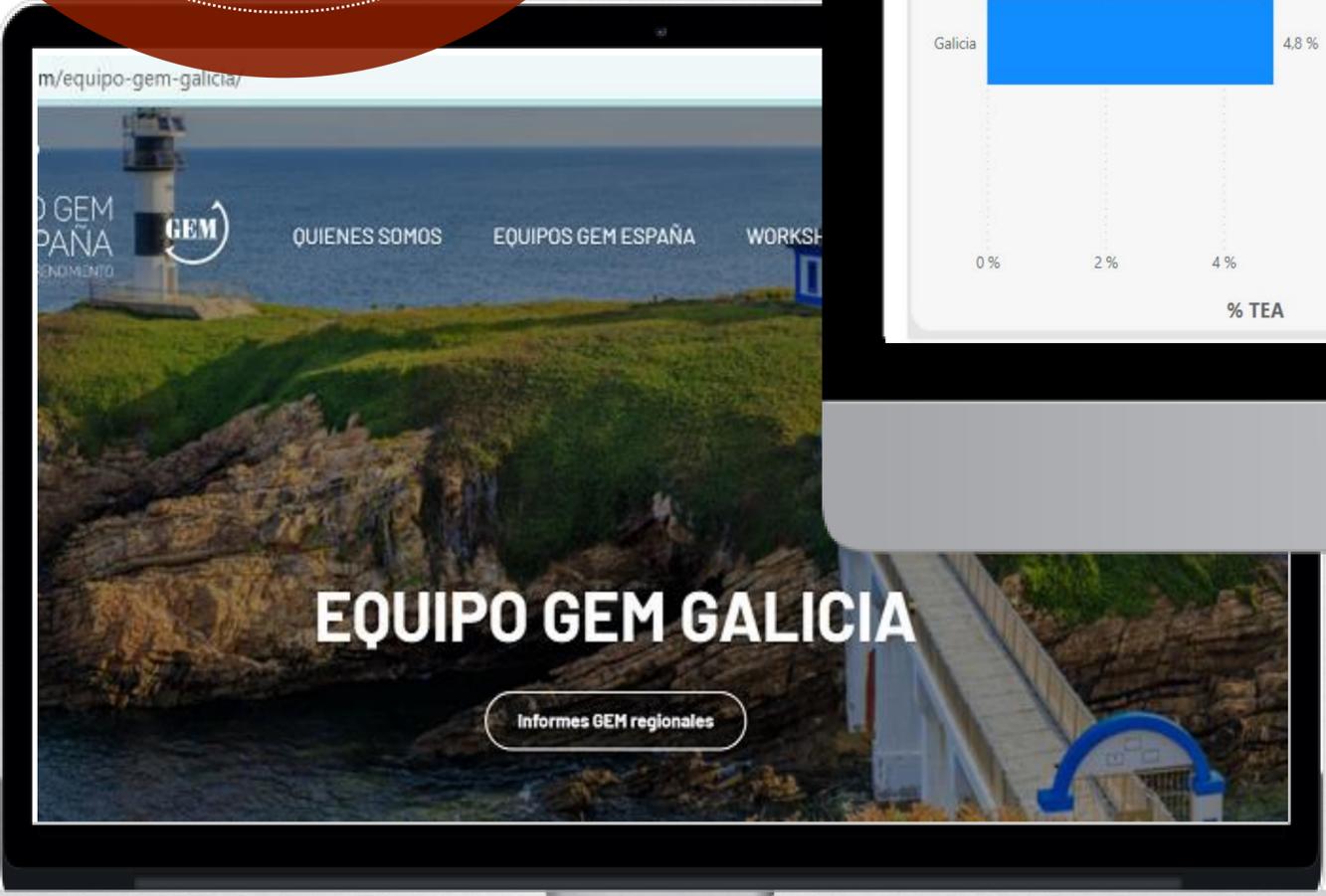
O ENTORNO PARA EMPRENDER EN GALICIA (VALORACIÓN DAS PERSOAS EXPERTAS)



0 CONTEXTO PARA EMPRENDER EN GALICIA



POWER BI GALICIA



O EQUIPO GEM GALICIA



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