YEAR 2026

Centro de Estrategia y Prospectiva Industrial

EXECUTIVE SUMMARY

The **Economic Impact** of **Standardization** in **Spain**

GOBIERNO DE ESPAÑA
MINISTERIO DE INDUSTRIA Y TURISMO

Escuela de Organización Industrial

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1. OBJECTIVES AND METHODOLOGY

Standards help improve quality and safety, increase transparency and interoperability, reduce costs, and open doors to new markets for companies, thereby enhancing their competitiveness in the markets in which they operate.

Previous studies conducted in other countries have reached a consensus that these benefits can extend to companies and also contribute to increased productivity and economic growth through, among other factors, scientific and technological knowledge and its dissemination. In fact, standards, as a source of codified knowledge, are considered a key vehicle for knowledge diffusion, meaning that standardization becomes an additional driver of economic growth.

Within this context, the present study was undertaken —the first of its kind carried out in Spain in this field. Its ultimate objective is to analyse the relationship between standardization and economic growth at both the macroeconomic and microeconomic levels. This general objective encompasses several specific aims:

- To analyse the relationship between the inventory or *stock* of applicable standards and variables related to economic growth, productivity, and competitiveness.
- To quantify the level of impact on the Spanish economy and compare it with the results obtained in different countries with similar studies.
- To identify the elements of economic activity specifically affected by the application of standards and the mechanisms through which this interrelationship occurs.
- To carry out a sector-level analysis in the case of industry.
- To put forward proposals aimed at strengthening the positive effects of standardization.

These objectives are addressed from two complementary methodological perspectives. The **first is macroeconomic**, focusing on estimating the impact of standardization on economic growth and productivity for the economy as a whole and at the sectoral level. This involves distinguishing between a group composed of the four major economic sectors—Agriculture, Industry, Construction, and Services—and a second group comprising eight cross-cutting sectors, which include all industrial, construction, and energy sectors. This analysis is complemented by medium- and long-term projections of GDP growth under four different scenarios for the growth of standards.

To carry out this analysis, it was essential to calculate the *stock* of standards for the Spanish economy as a whole and for the different sectors of interest. This calculation was based on the standards database of the Spanish Association for Standardization (UNE), which contains all officially recognized standards developed by official standardization bodies that are currently in force in Spain. The calculation resulted from a process of assigning standards to economic sectors, specifically designed for this purpose and based on rigorous allocation criteria.

The **second perspective is microeconomic**, which examines the impact of standardization on the industrial fabric. This analysis is based on a survey conducted with a representative sample of 600 Spanish companies in the industrial and construction sectors. It provides the first measurements of the levels of standards adoption and helps to

understand the mechanisms and processes through which standardization affects productivity and business competitiveness, as well as identifying the obstacles that different types of companies encounter in their implementation.

2. THE STOCK OF STANDARDS IN SPAIN

The UNE Standards Database has been used as the reference information source to quantify the *stock* of standards for the overall economy and for the two groups of economic sectors considered. The *stock* of standards is defined as the sum of all standards published and in force throughout a given year minus the sum of all standards that lost validity in the previous year. The standards considered are those with official recognition, developed by official standardization bodies (ISO, UNE, CEN, CENELEC, etc.) and currently in force in Spain.

In the case of economic sectors, both management system standards (generally applicable across sectors) and product standards (specific to each sector of activity) are considered. Therefore, the *stock* of standards variable for each sector is calculated by considering the total set of standards of both types (general standards + sector-specific standards).

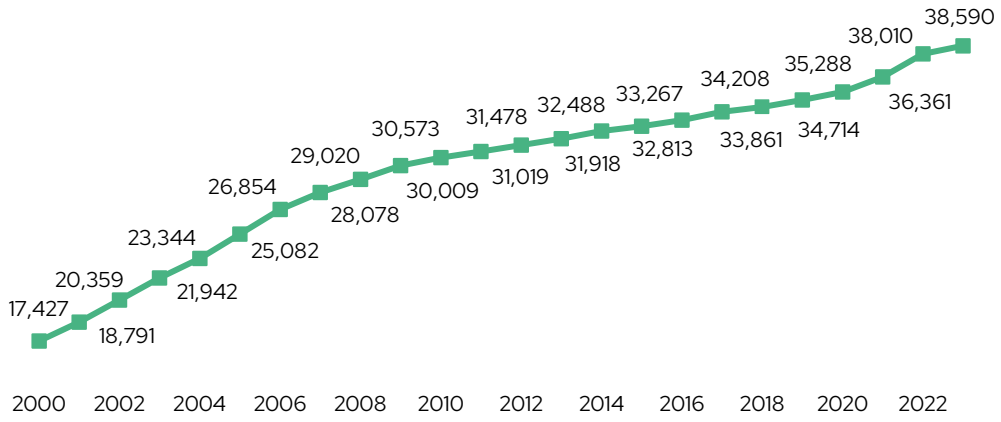
For its quantification, an ad hoc classification system for standards was developed, since there is no direct correspondence between the International Classification for Standards (ISO ICS) and the currently applicable Spanish National Classification of Economic Activities (CNAE-09).

Evolution of the stock of standards for the overall economy

Over the period 2000–2023, the evolution of the *stock* of standards in Spain shows that the generation of standards has not been uniform throughout the period. The average annual growth rate between 2000 and 2023 **was 3.6%, with stronger growth between 2000 and 2010 (5.8%) and significantly lower growth between 2011 and 2023 (1.8%)**. However, over the last four years, since 2019, a higher average annual growth rate in the generation of standards has been observed (2.7%), with 2022 standing out as the most prolific year, recording a 4.5% increase in the *stock* of standards compared with 2021.

FIGURE 1. **Evolution of the Stock of Standards in Spain**

2000-2023



Source: Abay Analistas, based on the UNE Standards Database.

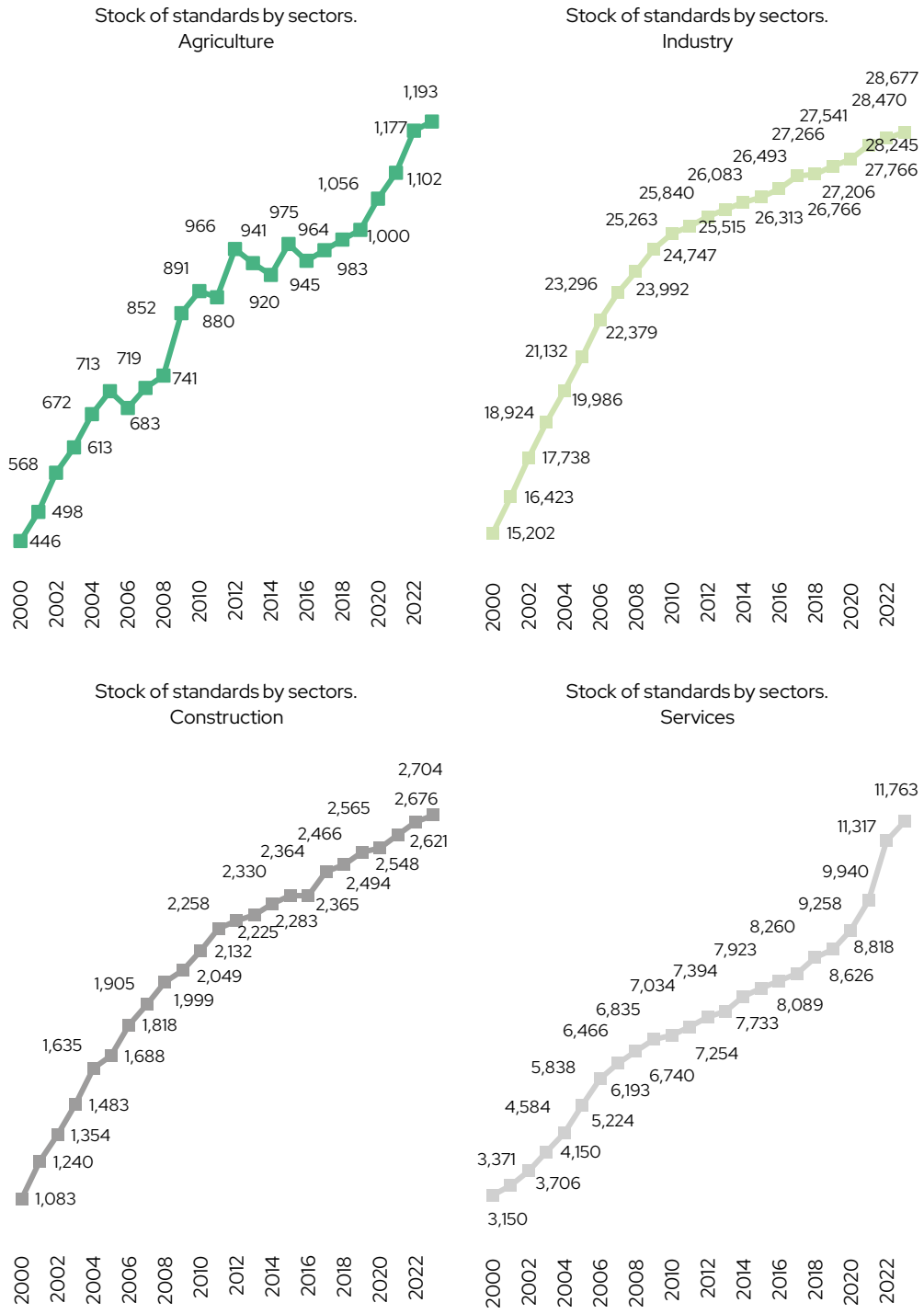
Evolution of the stock of standards in the four major sectors

The evolution of the *stock* of standards disaggregated by the four major economic sectors over the period 2000–2023 shows that **Industry** is the sector with the largest *stock* of standards in force in 2023, with a total of **28,677 standards**, followed by **Services** (11,763 standards), **Construction** (2,704 standards), and **Agriculture** (1,193 standards). Within the *stock* of standards in each sector, **545 correspond to management system or cross-cutting standards**, applicable to all sectors, while the remainder correspond to sector-specific standards.

The growth of the *stock* of standards over the period 2000–2023 follows the same pattern observed for the overall economy. During the period 2000–2010, the average growth rate was higher than during the period 2011–2023, with a renewed acceleration between 2020 and 2023. The sector in which the *stock* of standards increased the most over the entire period considered was **Services (6%)**, followed by **Agriculture (4.7%)**, **Construction (4.3%)**, and **Industry (3%)**. The latter is affected by the significant slowdown in the growth of the *stock* of standards between 2011 and 2023 (with an average growth rate of **1%**).

FIGURE 2. **Evolution of the Stock of Standards in the Four Major Sectors: Agriculture, Industry, Construction and Services**

2000–2023



Source: Abay Analistas, based on the UNE Standards Database.

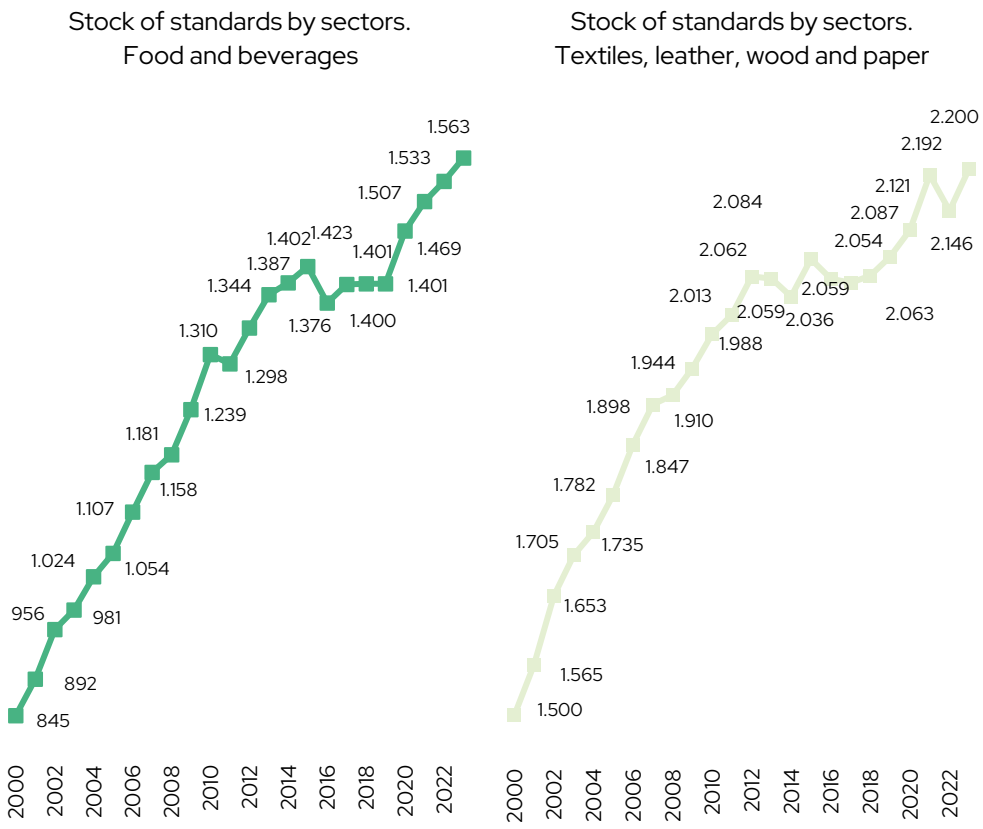
Evolution of the stock of standards in the eight cross-cutting sectors

Among the eight cross-cutting sectors that encompass industrial, construction and energy activities, the sectors **Electrical and electronic equipment** and **Manufactured and intermediate goods** have the largest *stock* of standards, with **9,461** and **9,037 standards**, respectively, in 2023. The sectors with the smallest *stock* of standards are **Energy (1,116 standards)** and **Food and beverages (1,563)**. However, both sectors—especially the former—have experienced relatively strong growth in the *stock* of standards over the period 2000–2023.

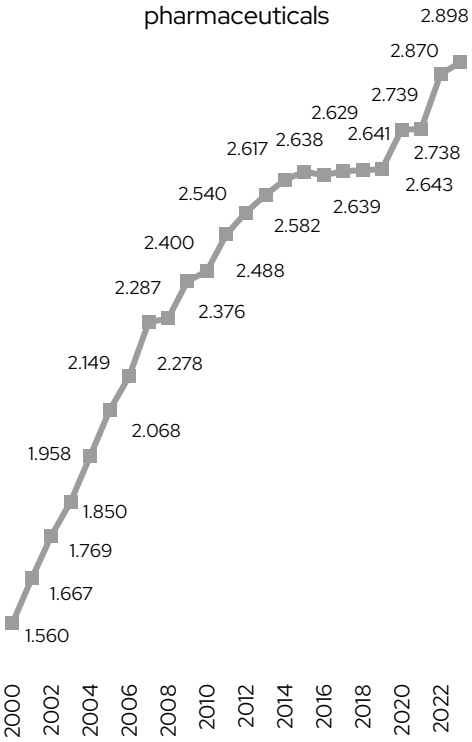
Over the period 2000–2023, the same pattern observed for the overall economy and the four major sectors can be seen. The sector with the largest increase in the *stock* of standards was **Energy (4.8%)**, followed by **Electrical and electronic equipment (3.7%)**, and **Food and beverages** and **Manufactured and intermediate goods (2.9%)**, among the most notable. Conversely, the sector with the lowest average growth in the *stock* of standards was **Textiles, leather, wood and paper (1.7%)**.

FIGURE 3. **Temporal Evolution of the Stock of Standards in the Eight Cross-Cutting Sectors of Industry, Construction and Energy Activities**

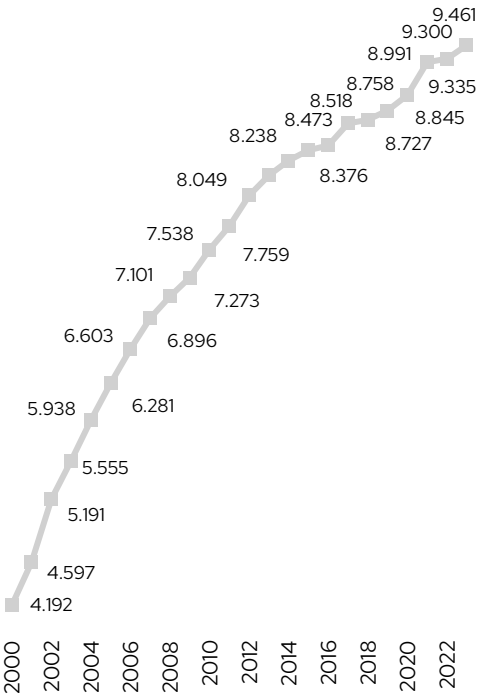
2020–2023



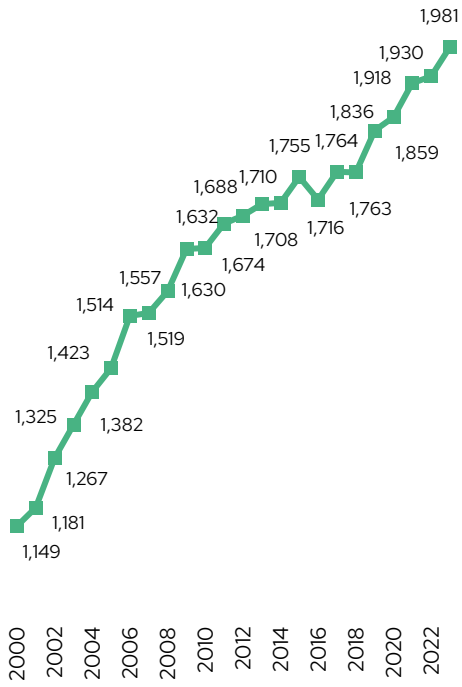
Stock of standards by sectors. Chemicals, petroleum, and pharmaceuticals



Stock of standards by sectors. Electrical and electronic equipment

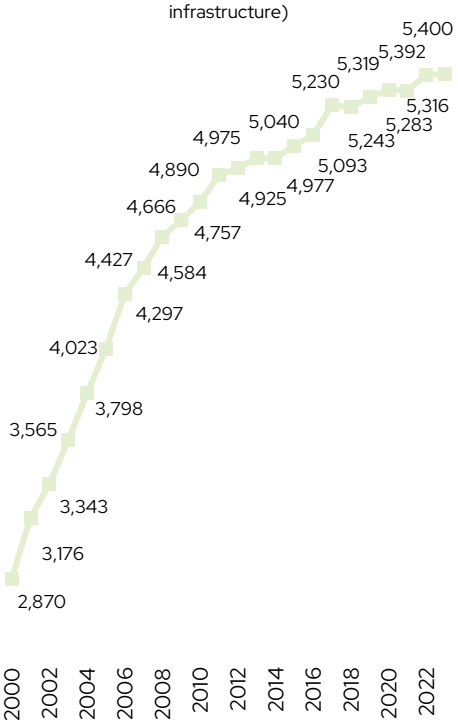


Stock of standards by sectors. Automotive and transport equipment

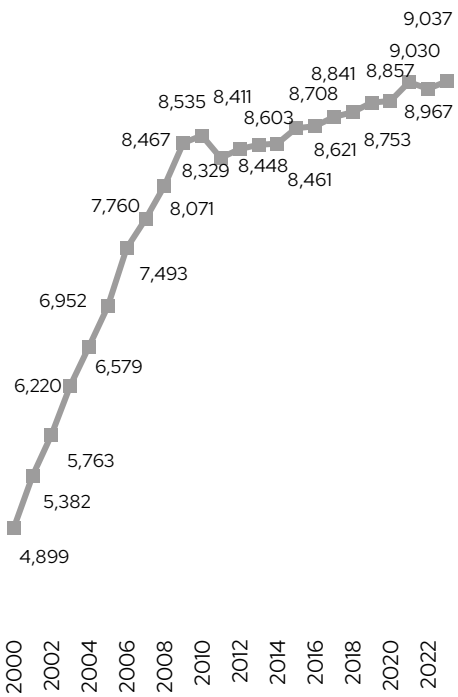


Stock of standards by sectors. Construction

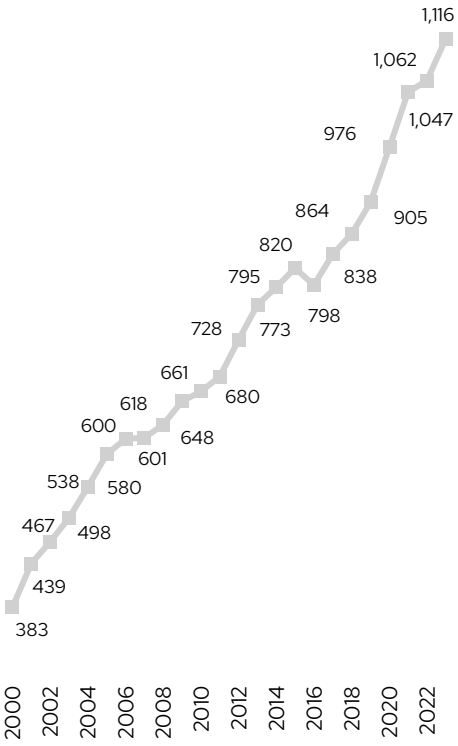
(Products, equipment, installation and infrastructure)



Stock of standards by sectors. Manufactured and intermediate goods



Stock of standards by sectors. Energy



Source: Abay Analistas, based on the UNE Standards Database.

3. THE IMPACT OF STANDARDIZATION

Standardization plays a significant role in Spain's economic development, as it constitutes an important factor for economic growth and productivity across the economy as a whole and within productive sectors. It also serves as a key strategic tool for improving business competitiveness, generating positive impacts at the macroeconomic level as well as across multiple dimensions of corporate performance.

3.1. Impact of standardization on the economy and across sectors

The analyses carried out provide the first estimate of the impact of standardization on the Spanish economy, as well as on the four major economic sectors (agriculture, industry, construction and services) and on eight cross-cutting sectors that include industrial, construction and energy activities.

The results show that standards emerge as a relevant factor for productivity and, therefore, for economic growth, both for the economy as a whole and at the sectoral level. In fact, standardization is significantly and positively associated with both economic growth and total factor productivity (TFP) in Spain.

Impact of standards on economic growth

The elasticity of economic growth and TFP with respect to standards is estimated at **0.068% for the economy as a whole**.

This elasticity would be associated with a contribution of standardization to real GDP growth and TFP, measured in percentage points, of **0.32 over the period 1981–2022** (**0.25 in the period 2000–2022**); a contribution of the growth in standards of **14.7% of real GDP growth** over that period (**15.4% in the period 2000–2022**); and a contribution of standards to real GDP, in monetary terms, of **€140.68 billion up to 2022** (**€10.5 billion in 2022 alone**).

Comparison with other countries

Compared with other countries, specifically France, Germany, the United Kingdom, the Nordic countries, Belgium and Canada, the results for Spain are broadly comparable in terms of the magnitude of the impacts and contributions.

The average elasticity of GDP and productivity with respect to the *stock* of standards is **0.068%**, which is in line with that observed in the Canadian economy and in the Nordic countries, although slightly lower than in Germany, France and the United Kingdom. Furthermore, the impact of standardization on GDP growth in Spain, measured in percentage points, is **0.32**, one point higher than in Belgium and four points lower than in France, Germany and the United Kingdom. The contribution of standards to GDP growth in Spain amounts to **14.7%**, which is broadly comparable to that observed in Canada and the Nordic countries.

TABLE 1. **Comparison of the Results of National Studies**

	FRANCE	GERMANY	UNITED KINGDOM	BELGIUM	CANADA	NORDIC COUNTRIES	SPAIN
Organization	AFNOR	DIN	Cebr	VUB	CboC	Menon	EOI-MINTUR (colab. UNE)
Year of publication	2008	2011	2015	2020	2021	2023	2025
Period of analysis	1950-2007	2002-2006	1921-2013	1994-2018	1981-2019	1970-2019	1980-2024
Estimated function	GDP	GDP	GDP/L	GDP & GDP/L	GDP/L	GDP/L	GDP
IMPACT OF STANDARDS							
Elasticity of the *stock* of standards	0.12	0.18	0.11		– 0.06	0.06	0.07
GDP growth (%)	3.4	–	2.4	–	–	–	2.2
Impact of standards on GDP growth (percentage points)	0.8	0.7	0.7	0.2	–	–	0.3
Contribution of standards to labor productivity growth (%)	23.8	–	28.4	19.0	17.4	16.0	14.7

Source: Authors own elaboration based on national studies.

GDP forecasts

Regarding real GDP projections, if the growth rate of standards were to remain unchanged, real GDP would reach **€1,300,878 million in 2026** (three years, medium term) and **€1,349,897 million in 2028** (five years, long term), implying annual growth of **1.9%**. Under this baseline scenario, if standards were to grow **5% faster**, real GDP would reach **€1,314,232 million in 2026** and **€1,373,071 million in 2028**, implying annual growth of **2.2%**. Conversely, if standards were to **decline by 5%**, real GDP would reach values below the baseline scenario-specifically **€1,287,615 million in 2026** and **€1,327,038 million in 2028**, corresponding to an annual growth rate of **1.5%**.

Similarly, **a 2.5% increase in standards** would result in real GDP levels of **€1,307,543 million in 2026** and **€1,361,445 million in 2028**, with annual growth of **2.0%**. In contrast, **a 2.5% decrease in standards** would lead to a decline in real GDP to **€1,294,235 million in 2026** and **€1,338,429 million in 2028**, corresponding to annual GDP growth of **1.7%**.

Impact of standards on the four major economic sectors

By sector, the elasticity of economic growth and TFP with respect to standards is estimated at **0.043% in Agriculture**, **0.089% in Industry**, **0.066% in Construction**, and **0.061% in Services** over the period **1986–2021**. Therefore, the sector in which standards have the greatest impact is **Industry**, while the sector with the lowest impact is **Agriculture**.

These results are associated with a contribution of standardization to real **gross value added (GVA)** growth, measured in percentage points, of **0.20 in Agriculture**, **0.28 in Industry**, **0.30 in Construction**, and **0.35 in Services** over the same period.

Impact of standards in the eight cross-cutting economic sectors

At a more detailed sectoral level, the elasticity of economic growth and TFP with respect to standards ranges from **0.11% in the Automotive and transport equipment sector** and **0.09% in Manufactured and intermediate goods** (the highest values), to **0.06% in Electrical and electronic equipment** and **Textiles, leather, wood and footwear** (the lowest values). The remaining sectors show intermediate impacts of the *stock* of standards within this range.

For the eight cross-cutting sectors, these results correspond to a contribution of standardization to the growth of the corresponding **gross value added**, measured in percentage points, ranging from **0.32 in the Energy sector** to **0.11 in the Textiles, leather, wood and paper sector** over the period **2000–2021**.

3.2. Impact of standardization on business competitiveness

The analyses carried out on the basis of the **Business Survey** provide the first representative measurement of the level of standards adoption among Spanish companies in the industrial and construction sectors. They also assess the impact of standardization on business competitiveness and identify the challenges that remain in this area, particularly for micro-enterprises.

The results reveal that standardization plays a fundamental role in improving business competitiveness, although its application varies significantly depending on company size, sector and degree of internationalization.

Level of standards adoption and motivations

1. There is a considerable level of professionalization and commitment to standards in Spain's industrial and construction sectors, as evidenced by the fact that **nearly 70% (67.9%) of companies apply standards**. However, this level of commitment could clearly be expanded by addressing the **certification gap**, as **30.7% of companies apply standards but do not certify them**.

2. The application of standards shows a clear correlation with company size, reaching **100% among large firms** and declining to **61.5% among micro-enterprises**. This difference suggests the existence of significant barriers to adoption among smaller companies, mainly related to resources and capabilities.

3. The sectoral analysis also reveals significant disparities in standards adoption. Sectors such as **Chemicals, petroleum and pharmaceuticals** show the highest levels of adoption (**90.9%**), while **Construction (products, equipment, installation and infrastructure) (66.0%)** and **Energy (50.0%)** record the lowest levels. The results highlight the importance of standards in technologically advanced sectors and the growing interest of more traditional industrial sectors and construction in standards, although these latter sectors face greater difficulties in accessing certification.

4. The survey results indicate that companies perceive standards primarily as **tools for improving competitiveness**, rather than as requirements imposed by regulation or the market. The three main motivations for adopting standards are **improving product quality**, **reducing risks (accidents, production errors and social responsibility)**, and **enhancing the company's image**. The application of standards significantly reinforces these motivations, indicating that the degree to which initial expectations are met is high.

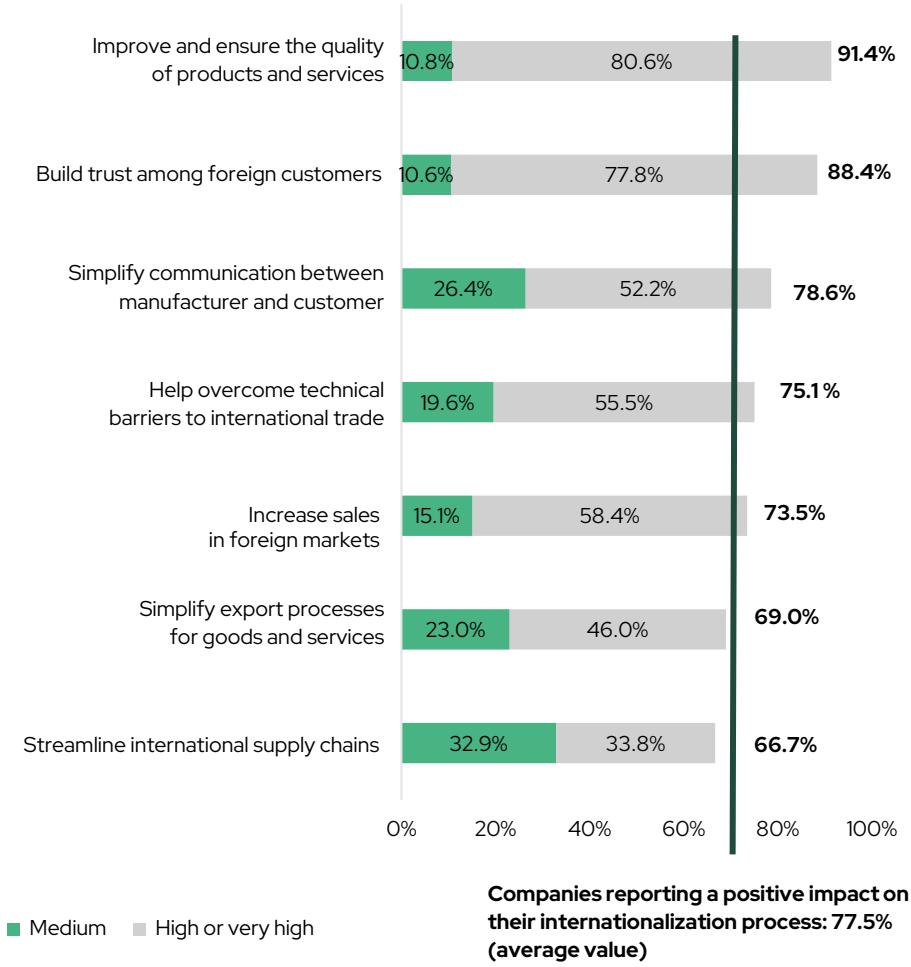
Impact of standards on business competitiveness

5. The results confirm a **notable positive impact of standards** on the main competitiveness factors analysed, including **improvements in efficiency in production processes and supply chains, internationalization, innovation, environmental performance and regulatory compliance**. The impact is also very significant on **corporate image**, while the effects on economic outcomes such as **productivity, turnover and employment** are more moderate.

6. The impact on **internationalization** stands out as one of the most significant benefits of standards. More than **90% of exporting companies** report substantial improvements in product quality and in the confidence of foreign customers. Standardization particularly facilitates the **overcoming of technical barriers (75.1%)** and improves **communication between manufacturer and client (78.6%)**. These results indicate that standards act as a key enabler of international expansion, which is especially relevant in a context of increasing globalization.

FIGURE 4. **Internationalized Companies Reporting a Medium, High or Very High Impact of Standards on Their Internationalization Process**

Percentage of the Total Number of Companies with Sales in Foreign Markets



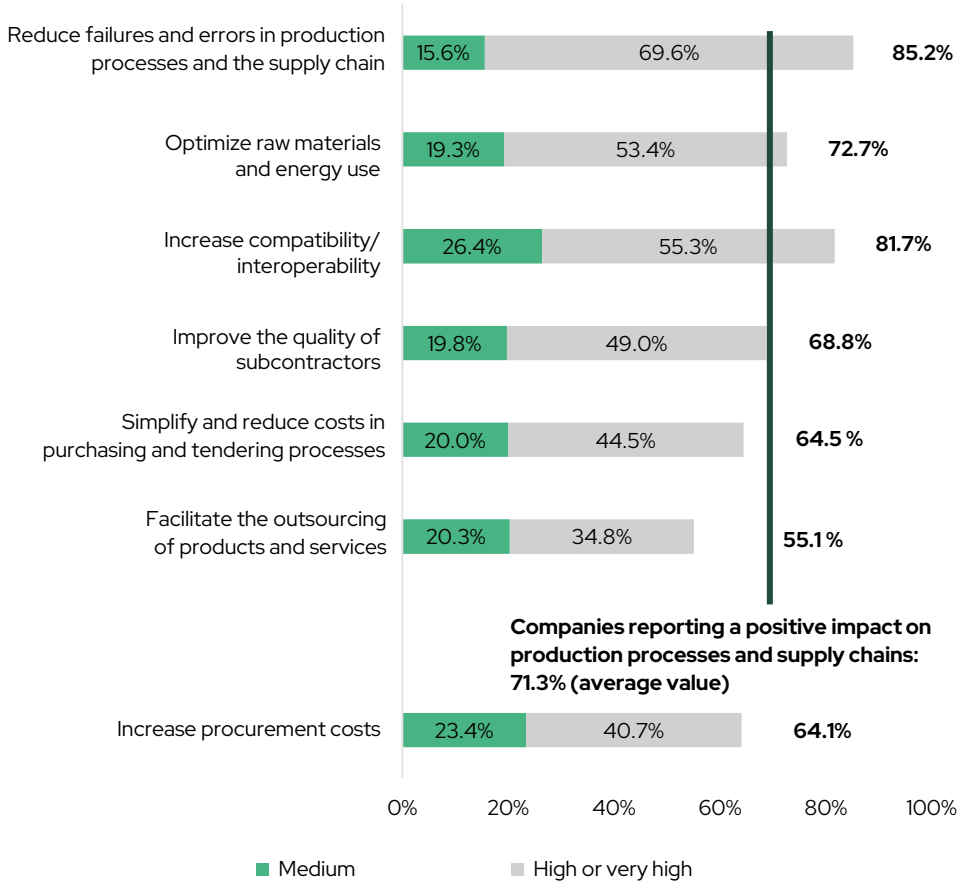
Source: Survey on the Impact of Standardization on Companies in Spain, 2024.

7. Standardization also emerges as an effective tool for **improving environmental sustainability**. Companies report clear benefits in terms of **environmental regulatory compliance** and improvements in the **sustainability of products and services**.

8. The impact of standardization on **production processes** shows that it contributes significantly to improvements in **operational efficiency**. **85.2% of companies report a significant reduction in failures and errors**, while **81.7% report improvements in compatibility and interoperability**. **Optimization of raw materials and energy use (72.7%)** also shows important benefits.

FIGURE 5. **Companies Reporting a Medium, High or Very High Impact of Standards on Production Processes and Supply Chains**

Percentage of the Total Number of Companies Applying Standards (With or Without Certification)



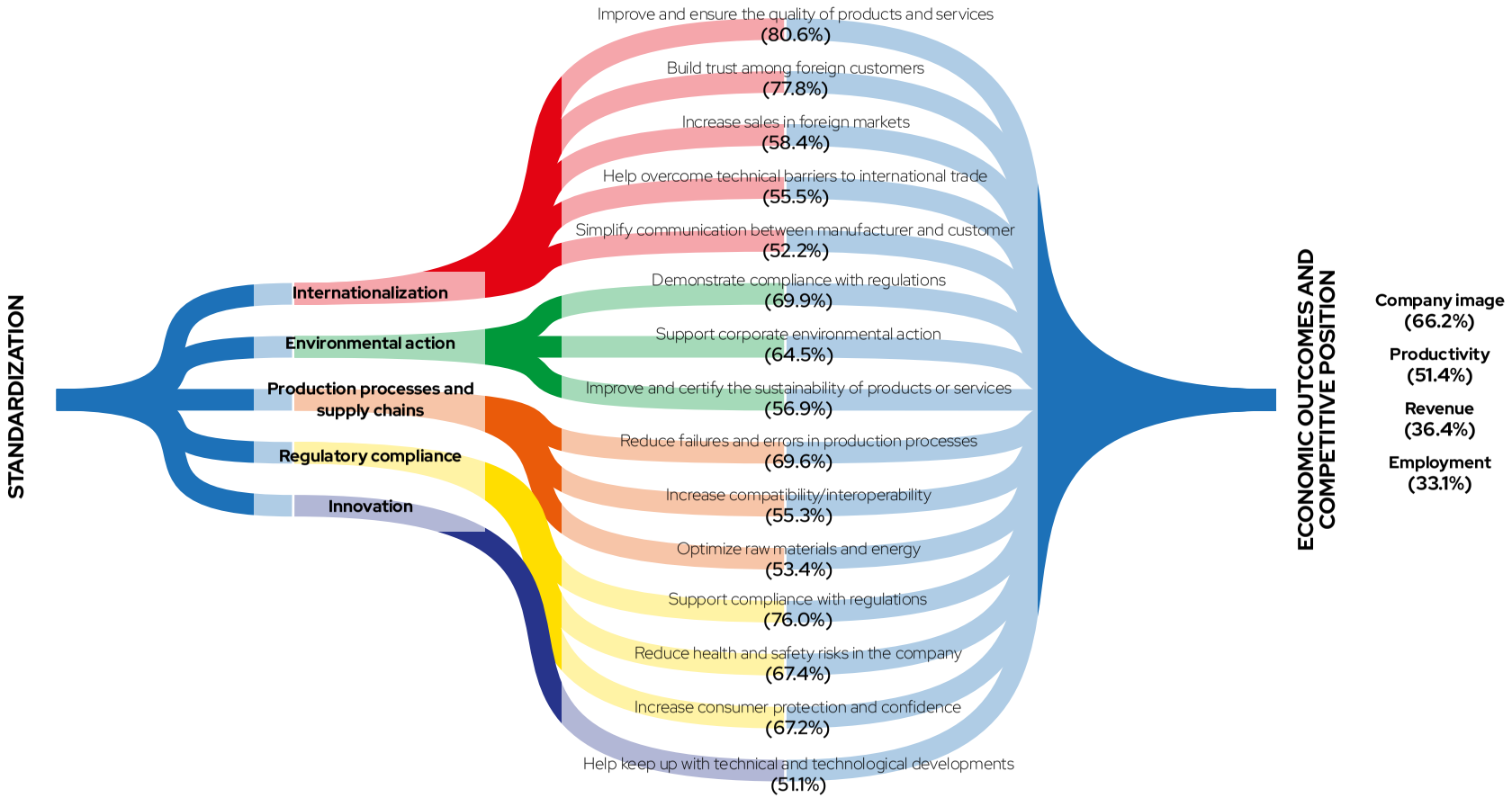
Source: Survey on the Impact of Standardization on Companies in Spain, 2024.

9. The relationship between **standardization and innovation** presents an interesting duality. On the one hand, it significantly facilitates the **monitoring of technical and technological developments** (**88.8% of companies report a medium, high or very high positive impact**) and improves the **productivity of innovation teams (75.5%)**. On the other hand, **63.8% of companies report constraints on the development of their own innovative technologies**. This finding suggests the need to balance standardization with the flexibility required for innovation, particularly in high-technology sectors.

10. The variables that most strongly enhance the positive impacts of standards adoption are **certification and company size**, particularly in relation to **production processes and supply chains, internationalization, economic performance, and competitive positioning**. The **sector variable is less relevant** in explaining impacts, except in the case of **internationalization**.

FIGURE 6. **Main Channels Through Which the Application of Standards Affects the Competitiveness of Spanish Industrial and Construction Companies**

Percentage of Companies Reporting a High or Very High Impact of Standards out of the Total Number of Companies Applying Standards, Except for Innovation (Total Innovative Companies Applying Standards) and Internationalization (Total Companies with Sales in Foreign Markets Applying Standards)



Source: Survey on the Impact of Standardization on Companies in Spain, 2024.

11. The **cost–benefit balance of standards adoption is positive**, especially for companies that both apply and certify standards. However, a significant imbalance is observed between the declared impact on competitiveness factors and performance outcomes and the overall net cost–benefit balance. This suggests the existence of **notable costs associated with the implementation and certification of standards**. The cost–benefit balance varies considerably by **company size**, being more favourable for larger firms, and also across **sectors**. The sectors **Automotive and transport equipment**, **Food and beverages**, and **Electrical and electronic equipment** show the most positive balance, suggesting that these sectors have been more successful in optimizing the implementation of standards and capitalizing on their benefits. This pattern could serve as a reference for identifying **best practices applicable to other sectors**.

12. The **obstacles to the use of standards**, both among companies that already apply them and those that do not yet do so, are mainly concentrated in **economic and administrative aspects**. **Implementation and maintenance costs (68.2%)** and **bureaucratic requirements for certification (65.3%)** are the main barriers. Investment needs, primarily in **training**, but also in **infrastructure (45.4%),** and the **lack of specialized personnel (43.1%)** constitute a second level of obstacles. These findings highlight specific areas where **support policies could have the greatest impact**.

13. In line with the main obstacles identified, companies call for **administrative simplification measures (66.8%)**, **financial support through subsidies (56.9%)**, and **reductions in certification costs (44.9%)**. These demands are particularly pronounced among **small and medium-sized enterprises**, suggesting the need for **size-specific policy approaches** in initiatives supporting standardization.

4. RECOMMENDATIONS TO FACILITATE THE APPLICATION OF STANDARDS IN SMES

Although standardization is an important factor for both national competitiveness and business competitiveness, there are still significant areas for improvement to facilitate the application of standards by companies—particularly smaller ones—and to ensure a more effective and efficient functioning of the standardization ecosystem in Spain.

Recommendations to facilitate SMEs' access to standardization

Evidence suggests that, in order to maximize the potential of standardization as a catalyst for business competitiveness, it would be advisable to develop a **comprehensive support programme** combining administrative simplification, financial support, technical assistance and training in standardization, with particular attention to the specific needs of SMEs. The programme should be guided by the following recommendations.

Furthermore, the clear positive differential observed among **certified companies** highlights the importance of promoting not only the application of standards but also their **certification**, as a means of maximizing the return on investment in standardization. Such a strategy could significantly strengthen the competitive position of Spanish businesses in an increasingly globalized and demanding economic environment.

1. Information and awareness-raising on standards, aimed at making companies aware of the role and benefits that standards can bring to business expansion and competitiveness in the marketplace. This is a first step in helping firms perceive that the effort in time and resources is worthwhile. In this regard, coordination among actors with different perspectives and functions within the standardization ecosystem is important in order to consolidate efforts around a common and widely agreed narrative on standards and their benefits. This message could then be communicated to companies in ways tailored to their sectors, along with additional information on the standards relevant to them, through channels such as business associations, information campaigns, workshops and other events.

2. Simplification of bureaucracy associated with the implementation and, particularly, the certification of standards, including reducing administrative requirements for smaller companies, standardizing and streamlining processes, and shortening timelines for decisions, consultations and budget preparation. This issue is identified as particularly relevant for **management system standards**, which are cross-cutting across sectors and widely applied by the productive sector, as well as for **product standards**, which in some sectors are widely applied because they facilitate compliance with legislation. Administrative simplification is therefore considered key to encouraging more companies to engage in the implementation and/or certification of standards.

3. Tools and resources to facilitate the application and certification of standards. Closely related to the previous point, greater technical support is needed through specific tools and resources to facilitate companies' implementation and certification of standards. Among the more traditional tools are **simplified manuals and practical guides**,

written in clear and accessible language adapted to small businesses. Among the more innovative tools are **digital solutions**, such as digital platforms to securely exchange documentation during audits and certifications, or interactive interfaces that guide companies' step by step through administrative procedures.

4. Financial support and incentives to facilitate the application and certification of standards. The lack of dedicated resources for standardization in small businesses is identified as one of the main underlying causes of the difficulties these firms face in incorporating standardization into their management and operations. For this reason, financial support through **direct public subsidies and/or tax incentives** should be considered by public administrations. Within this framework, a wide range of activities could potentially be supported, including **specialized training, technical and support materials, hiring specialized staff, testing activities, audits, certifications, and the purchase of standards**; the latter being particularly relevant in highly regulated sectors with a large number of mandatory standards.

5. Specialized training in standardization. Training related to standards, their benefits, uses and implementation, through sector-specific programmes tailored to the needs and characteristics of small businesses, and offered at affordable or subsidized costs, would complete a comprehensive programme supporting standardization among SMEs. Training could be delivered through different formats, such as **online workshops, short training modules or step-by-step practical guides**.

In addition, and as a complementary measure, it is considered important to **strengthen education in standardization from earlier stages**, by incorporating it into higher education programmes at universities and vocational training institutions. This would help train future professionals and middle managers with expertise in standardization.

Recommendations to strengthen the standardization ecosystem

The main proposals for strengthening the standardization ecosystem in Spain focus on building a **more collaborative and agile ecosystem**, capable of generating and conveying a common message about standardization, increasing agility and flexibility in the development of standards, encouraging greater participation of SMEs in their development, and improving international integration.

1. Active collaboration among stakeholders to promote more effective engagement by all actors in disseminating and expanding standardization among companies, through regular discussion forums and agile collaborative structures. Examples include **creation of an interministerial council on standardization**, in which other ecosystem stakeholders, particularly SMEs, could participate through working groups or discussion panels. The objective would be to align approaches to standards across all public institutions with responsibilities within the same sector of activity. And **creation of a permanent standardization forum** bringing together all actors in the ecosystem in order to foster continuous exchange of needs and solutions, thereby encouraging and facilitating SME involvement in all standardization processes. Within this framework, it would be

particularly important to organize meetings, workshops or other forums where companies can engage in networking and meet peers to share experiences and lessons learned.

2. Integration of digital tools (online platforms, interactive interfaces, artificial intelligence, etc.) into the field of standardization, in order to respond to companies' demand for information and support on standards and their implementation. Digitalization could also help automate and streamline processes, reduce timelines and lower costs associated with the development and certification of standards, thereby encouraging greater participation by small companies in standardization activities.

3. International integration and positioning of the Spanish standardization ecosystem. With regard to integration at the European level, progress is needed toward **greater harmonization in the development of standards within the EU**, so that product standards for goods marketed across national borders are developed under homogeneous criteria, or even as single standards, thus avoiding the current disparities that limit access to larger markets, including the Single Market. This issue could be prioritized particularly for **mandatory standards** or in rapidly developing areas such as **cybersecurity and sustainability**.

In addition, Spain's representation in **European and international standardization committees** is considered crucial so that the country can continue contributing to the development of global standards aligned with its national priorities, further strengthen its international positioning, and promote a more competitive ecosystem aligned with international best practices.

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Centro de Estrategia y Prospectiva Industrial

GOBIERNO DE ESPAÑA
MINISTERIO DE INDUSTRIA Y TURISMO

Escuela de Organización Industrial

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EXECUTIVE SUMMARY

The **Economic Impact** of **Standardization** in **Spain**

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