

AWS Infrastructure Region in Aragón (Spain)

Economic and Business Impact

Summary of Results



Market Study Conducted by GfK

For Amazon Web Services
June–July 2026





Methodology

This report presents the key findings of the study on the economic and business impact of Amazon Web Services (AWS) data centers in Aragón and Spain. The study aims to quantify the effect that AWS’s operations have on the country’s business landscape, in terms of revenue, employment, and geographic expansion, as well as the overall perception of supplier companies. The study was conducted using a combination of telephone (CATI) and online (CAWI) interviews with companies in Aragón and throughout Spain. Fieldwork was carried out between June and July 2026.

Concept	Details
Research Firm	GfK Emer Ad Hoc Research
Client	Amazon Web Services (AWS)
Geographic Scope	Spain and Aragón
Study Population	Companies in Aragon and Spain
Methodology	Telephone interviews (CATI) and online interviews (CAWI)
Active AWS providers	N = 59
Random sample (non-providers)	N = 97
Fieldwork	June–July 2026



The study combines two subsamples: a database of AWS providers and a random sample of Aragonese companies not directly linked to AWS, in order to establish comparisons regarding economic impact and business prospects.



Profile of the surveyed companies

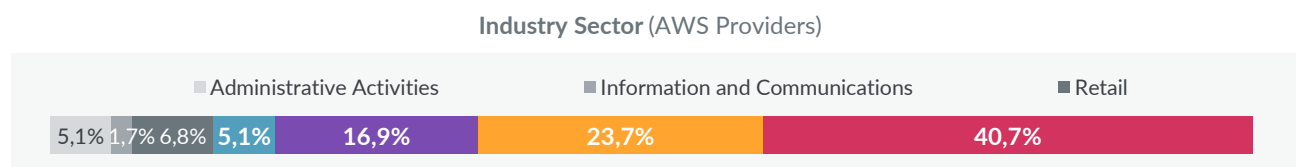
Sample profile

The sample is divided between companies that work with AWS (directly or indirectly) and those that have never worked with AWS.

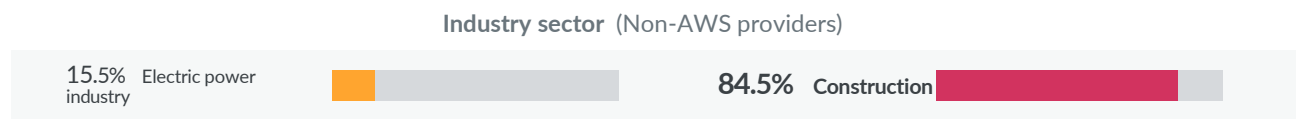
Do you currently work for AWS, either directly or indirectly?	SAMPLE 1 (n=59)	GROUP 2 (n=97)
Yes (works with AWS)	100%	—
I have never worked with AWS	—	100%
Database size	n=59	n=97

Sector and Main Activity

The sectoral profile of companies working with AWS (Base 1) shows a greater concentration in the industrial and engineering sectors, while companies without AWS (Base 2) focus their activity on construction.



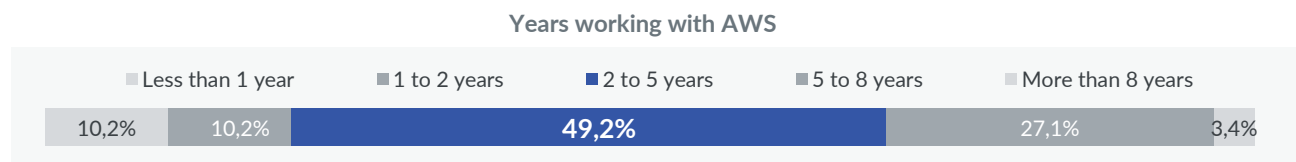
The predominant sectors among AWS providers are Construction (40.7%) and Manufacturing (23.7%), followed by Other Services (16.9%) and Professional, Scientific, and Technical Activities (5.1%). This distribution reflects the nature of the construction work and services required for the construction, maintenance, and operation of data centers.



Among companies that are not AWS providers, the main industry is **Construction (84.5%)**

Length of time working with AWS

Most companies have been working with AWS for between 2 and 5 years (49.%), reflecting a well-established, medium-term working relationship.





Impact on revenue and profit

Impact on revenue attributable to AWS

More than half of active providers (60%) report that their total revenue has increased since they began working with AWS data centers. Among those reporting a positive impact, the average revenue increase reaches 35%.

Furthermore, AWS-related activity accounts for an average of 12% of these companies' current revenue, although there are notable differences among companies, with percentages ranging from very low figures to cases where AWS plays a significant role in the business.

Since you began working with AWS, have you experienced a change in revenue attributable to your use of AWS?

AWS Providers

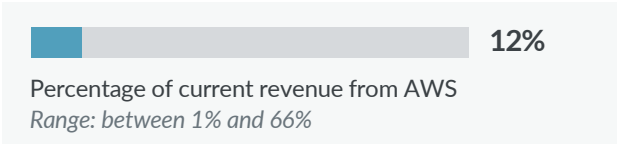
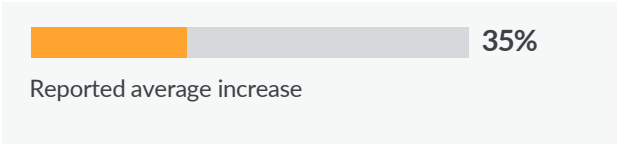
Yes, it has increased

60%

It has remained the same

40%

Based on those able to determine it



Impact on net income attributable to AWS

In line with the revenue findings, 53% of active suppliers report an increase in their company's net profit since they began working with AWS. Companies reporting improved profitability are primarily larger firms and those with a longer-standing relationship with AWS, suggesting that the positive impact becomes more firmly established over time. Among supplier companies, the average increase in net profit attributable to AWS reaches 35%

Has your company's net profit increased?

AWS Providers

Yes, it has increased

53%

It has remained the same

47%



+35%

Average increase in net income

Trends over the past five years for non-AWS providers

For companies that do not work with AWS, changes in revenue and net profit over the last five years were analysed. Among non-AWS supplier companies, 56% have increased their revenue over the past five years, while 33% have reported an increase in net profit. Furthermore, the average increases recorded amount to 26% for revenue and 32% for net profit, reflecting a positive business performance trend over the period analysed.

Over the past five years, their revenue has...

Non-AWS providers

Increased	56%
Remained stable	34%
Decreased	10%



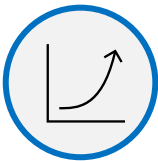
+26%

Reported average increase
in revenue over the last 5 years

Over the past five years, its net profit has...

Non-AWS providers

Increased	33%
Remained stable	48%
Decreased	19%



+32%

Average increase in net income over the last 5
years



Gilva is a family-owned company in Teruel that specializes in manufacturing precast concrete components for industrial buildings and technical facilities.



Since 2023, Gilva has been collaborating with AWS on the construction of its data centers in Aragón. Since then, its revenue from AWS projects has increased more than sixfold in just three years. At the same time, the company’s overall revenue has grown by 23%, and its workforce has expanded from 101 to 115 employees, adding 14 new jobs.

Furthermore, the arrival of AWS has driven innovation at Gilva, which is currently developing a new product specifically designed for cable ducting in data centers.



Employment Trends

The performance of AWS provider companies can be described in three broad categories:

Category	Records	% of Total
Growth (inc > 0)	35	59%
No change (inc = 0)	21	36%
Decrease (inc < 0)	3	5%

The most significant finding is that nearly 60% experienced a positive increase in employment. In contrast, among non-supplier companies, only 41% have seen an increase in the number of employees.

This favorable distribution suggests an environment of widespread expansion.

Percentage of current employees working on AWS-related projects	Suppliers AWS
1% of employees working on AWS	22%
5% of employees at AWS	12%
10% of employees at AWS	10%
20% of employees on AWS	7%
30% or more of employees on AWS	10%
100% of employees on AWS	7%
Weighted average	21%

Although a significant portion of companies maintain a limited focus on AWS—with concentrations primarily between 1% and 10% of the workforce—the results show the existence of a significant group of highly specialized companies. The average focus of 21% reflects that AWS already plays a significant role in the employment structure of the providers analyzed.

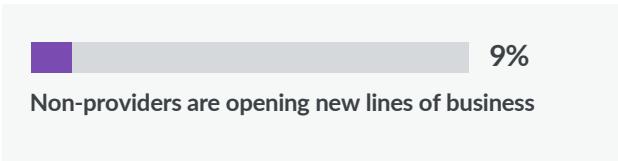
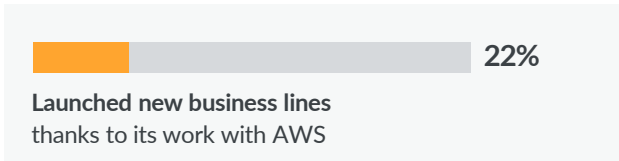


Giral Excavaciones y Obras is a family-owned company based in Huesca with more than 50 years of experience. Since 2021, Giral has been working with AWS on the construction of its data centers in Aragón. Over the past five years, its revenue has grown by approximately 22% and its workforce has expanded by 25%, increasing from 24 to 30 employees—both growths directly linked to the execution of construction projects for AWS.





New Business Lines and Geographic Expansion

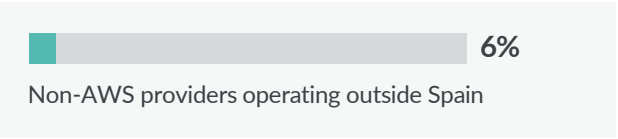
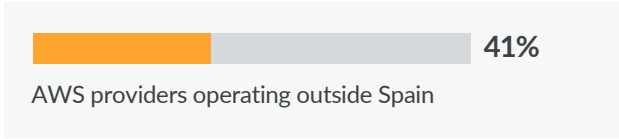
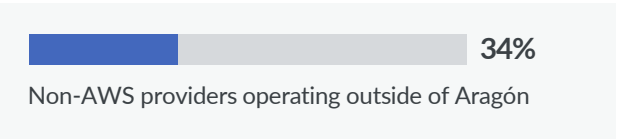
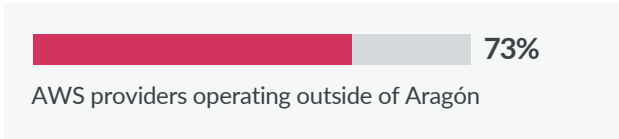


22% of AWS provider companies have managed to open at least one new line of business thanks to their collaboration with data centers, a proportion significantly higher than that observed among companies that have never worked with AWS (9%). In contrast, 78% of AWS providers maintain the same lines of business they had previously, compared to 9% of companies not affiliated with AWS.

Overall, the data suggests that working with AWS not only allows many companies to consolidate and expand their core business but also fosters diversification and the exploration of new growth opportunities.

Geographic Expansion

AWS providers demonstrate a much broader geographic reach than companies that have never worked with AWS. Nearly three out of every four providers (73%) operate outside of Aragón, compared to 34% of companies with no connection to AWS. The difference is even more pronounced internationally: 41% of providers operate outside of Spain, while among companies that have never worked with AWS, this figure stands at just 6%.



Furthermore, part of this expansion is directly related to collaboration with AWS. Among companies operating outside of Aragón, 12% attribute their expansion into new autonomous communities to their work with AWS. Similarly, among companies operating outside of Spain, 21% indicate that they have launched operations in new countries thanks to their collaboration with AWS.

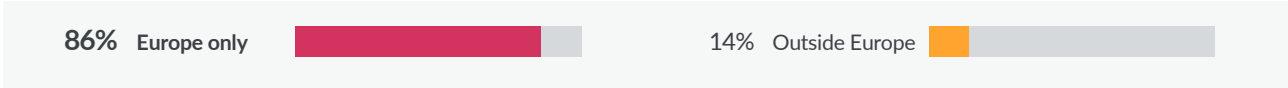
Overall, the data shows that AWS providers have a profile more focused on growth and geographic expansion, with a much broader presence both within and outside Spain than companies that have never worked with AWS.

Working with AWS in Aragon also opens up new opportunities to work with other AWS Regions outside of Spain. Although more than half (54%) have not yet explored this possibility, 34% express interest in doing so in the future.

In addition, there is already a group of companies that has managed to expand its operations beyond the domestic market. Currently, 2% are in the process of starting to work for another AWS Region, 7% operate in one additional Region, and 3% operate in two or more Regions.

Among the companies already working across multiple AWS Regions, activity is primarily concentrated in Europe.

International Activity

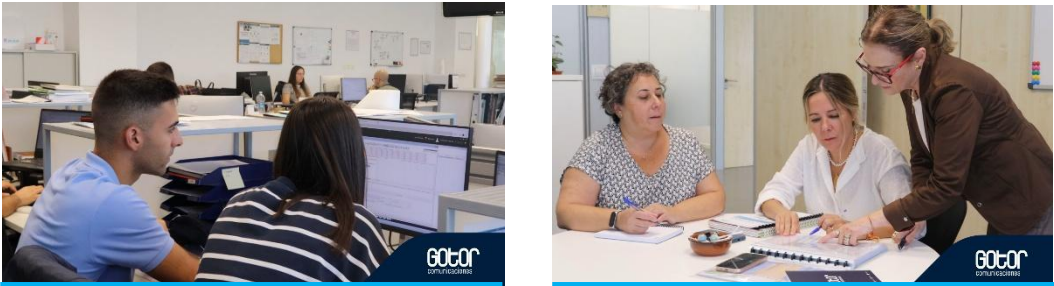


Gotor Comunicaciones is a family-owned company founded in 1989 in Zaragoza, specializing in telecommunications consulting and engineering. With over 35 years of experience, it is dedicated to designing, implementing, and maintaining technological solutions that improve communication and operational efficiency for businesses.



Since it began developing telecommunications solutions for AWS data centers in 2022, the company has seen a 10–15% increase in revenue directly attributable to the work performed for AWS, as well as a 20% growth in its workforce linked exclusively to these projects.

Gotor Comunicaciones has also developed a new line of business specializing in data centers, diversifying its operations and entering a strategic, forward-looking sector of particular importance in Aragón.





Stability, Outlook, and Overall Assessment

Financial and Operational Stability

Active providers were asked whether they believed their company has greater financial and operational stability since working with AWS.

Twenty-seven percent of active providers state that their company has greater financial and operational stability since working with AWS.

In addition, three out of ten report having gained greater decision-making autonomy since working with AWS, increasing their ability to select projects and reject less attractive ones. Conversely, only 2% believe their ability to choose has decreased.

Overall Assessment

The assessment of AWS’s impact among supplier companies is clearly favorable. 85% believe that working with AWS has had a positive or very positive impact on their organization, while 36% rate it directly as very positive. Only 15% maintain a neutral stance, and no negative assessments were reported. These results reflect a high level of satisfaction with the benefits associated with AWS-related activities.



The outlook for continuing the relationship with AWS is very favorable. Nearly two-thirds of provider companies (64%) state that they will continue working with AWS over the next few years. Meanwhile, 34% indicate that continuity does not depend exclusively on their decision, while other responses are negligible (2%).

Growth expectations are notably more optimistic among AWS supplier companies than among non-supplier companies. While 75% of suppliers expect their company to grow over the next 2 or 3 years, this perception drops to 30% among non-supplier companies.

In contrast, more than half of non-provider companies (56%) believe their business will remain stable, compared to 22% of providers. Furthermore, no provider company anticipates a negative trend, while 8% of non-providers expect difficulties in maintaining their operations or a decline in business. These results reflect greater optimism and confidence in future prospects among companies that are part of the AWS ecosystem.



Conclusions

The body of evidence gathered in the study leads to the conclusion that the presence of Amazon Web Services data centers in Aragón has a clearly positive economic and business impact.

- **Financial Stimulus:** Supplier companies demonstrate a greater capacity to generate profits than non-supplier companies. The proportion of companies that have increased their net profit is nearly 10 percentage points higher.
- Supplier companies have a more favorable impact on job creation, as nearly 60% report having increased their workforce. In comparison, among non-supplier companies, this percentage drops to 41%, indicating that the relationship with the activity under analysis has contributed to employment growth among supplier companies.
- **Internationalization:** AWS drives the geographic expansion of its suppliers, both within and outside Spain, serving as a catalyst for internationalization for the Aragon-based company.
- **Business diversification:** A significant portion of the suppliers have been able to open new lines of business thanks to their relationship with AWS, generating a diversification effect that goes beyond the direct contract.
- **Satisfaction and confidence in the future:** The assessment of AWS's impact is unanimously positive among its suppliers, and growth expectations are considerably more optimistic than those of the rest of the Aragonese business community.