



ASOCIACION ESPAÑOLA
DE FRANQUICIADORES



WOMEN IN FRANCHISING

Spain 2021



Luisa Masuet

Chairperson of the Spanish Association of Franchisors



International institutions



Dr. Hatem Zaki,

General Secretary of the World Franchise Council (WFC) 2017-2021



Didier DEPREAY

Chairperson of the European Franchise Federation (EFF)



EUROPEAN FRANCHISE FEDERATION

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Gabriel Moyá Ferrer

Director of Banco Sabadell's Franchise Department



Gorka Uranga

Sales and Operations Director, Mail Boxes Etc. Spain





Luisa Masuet
Chairperson of the Spanish
Association of Franchisors



The Spanish Franchisors' Association, was set up in 1993 with the clear objective of representing, watching over and defending the interests of the franchise system in Spain, as well as acting as interlocutors with the different public administrations, and advising and informing all those entrepreneurs who are thinking of starting up a franchise business and becoming entrepreneurs. It has always been concerned about producing different studies that would reliably, objectively and independently reflect the reality of this business collaboration formula, by means of contrasted data that could be relayed on to the market.

This topic became a reality in 2002, through the reports "Franchising in Spain " and "Spanish Franchising around the world", and which were later joined by the "Observatory of Franchising Case Law in Spain", a pioneering and unique study in the world on the degree of franchise litigation in Spain, and to which we are now adding another report, which we are also very pleased to present and make public, given that there is no other study of these characteristics at world level: "Women in Franchising".

The aim of this report is to determine, in a real and objective way, the degree of presence of women in executive and senior management positions, both in the franchising businesses that make up this system of commerce in Spain and in the networks of franchised establishments. And the data provided by this first study show that women currently occupy 21.82% of the management positions in franchising in Spain, that women franchisees account for 32.54% of the total number of franchisees, and also that 67.5% of franchising businesses have a woman in their management bodies.

These are percentages that we are sure will increase in the next editions of this Report, which was created with the intention of being permanent and drawn up on an ongoing basis to observe the evolution of the presence of women in the franchising industry in Spain and the increasingly important role they are playing, carving out their own niche in the world of business.

Finally, we would like to thank Banco Sabadell for its collaboration and support in sponsoring and disseminating this study, making it available to a greater number of social and economic partners, as well as to more than 1,300 franchisor businesses, who have contributed their data for the final preparation of this first report on "Women in Franchising".



Dr. Hatem Zaki
General Secretary of the
World Franchise Council (WFC)
2017-2021



The Association of Spanish Franchisors (AEF – as per its Spanish acronym) presents the 1st edition of the report “The role of women in the franchise system”, a pioneering study that aims to determine the presence of women in franchising in Spain, with emphasis on senior management positions.

According to Pricewaterhouse Coopers and the International Franchise Association, women-owned businesses account for approximately 25 % of all franchise units in North America today. As the percentage of women investing in franchising continues to grow, franchisors are taking note and increasingly targeting their recruitment efforts towards the female demographic group.

In the last decade, there has been a significant increase in the number of women entrepreneurs overall: in the US women own more than 11.6 million businesses and women-owned businesses now account for 39% of all private businesses. (Statistics from the American Express OPEN The State of Women-Owned Businesses 2017 report.)

In addition, more and more women are looking for flexible professions outside the traditional nine-to-five hours. Franchising is seen as a way to create a flexible business around family life or other care commitments, with the support of the franchisor and the management team. Therefore, the speed with which a franchisee can get up and running with the new business as it is already a proven business model is also an attractive factor.

Women franchisees are active in all sectors of the franchise business, as well as serving as CEOs and presidents of franchise brands. Although franchising has historically been a male-dominated sector, women business owners have made significant strides in the last decade. Today, in North America, women open 1 in 3 new franchise businesses and the number of women-owned franchises has increased significantly.

The World Franchise Council (WFC) is a non-political federation of 44 national franchise associations from around the world, together with 3 supranational bodies: the Asia-Pacific Franchise Confederation; the European Franchise Federation and the Federación Iberoamericana de Franquicias (FIAF).

Finally, I would like to congratulate the AEF on another successful project and wish them all the best.

Sincerely.



EUROPEAN FRANCHISE FEDERATION

Didier DEPREAY
Chairperson of the European
Franchise Federation (EFF)



Franchising is a powerful development tool for any business that sees the benefits of transferring its know-how to future independent partners.

The reality is that future independent couples are still predominantly male. However, the creation of franchise businesses has led to an increasing number of women entering the sector in recent years.

Today, more than 40% of franchise brands are run by women with brands and concepts that are part of their direct consumer experience.

The network managers are mainly looking for franchise candidates in the fields of fashion, beauty and wellness. Even traditionally male-dominated sectors such as restoration, auto repair, home renovation and real estate are looking for women.

Network managers appreciate female candidates for their realism and down-to-earth style; they tend to be very dedicated, have high self-esteem and empathy and their involvement works wonders in client relations.

Many business opportunities are now available to women seeking to become franchisees. The brands have set themselves the goal of encouraging and supporting these women in search of a new professional life in the franchise sector.

Franchise federations have many female-represented brands among their members; it is common to see female heads of franchise networks and federations led by women.

As President of the European Franchise Federation, I can only encourage networks to promote female candidates, as the mentality and culture necessary for their development closely match the profile of female entrepreneurs.



Gabriel Moyá Ferrer
*Director of Banco Sabadell's
Franchise Department*



Undoubtedly, in the current environment, a study such as the one presented by the AEF is both fundamental and necessary in order to be able to see the figures and subsequently the evolution of the presence of women in business decision-making bodies in the world of franchising, as well as in networks of franchised establishments. In this way, the goal of achieving equal opportunities without negative or positive discrimination will get closer and closer. This study of the position of women will make us all more aware of the need for equal opportunities for a more professional and equal growth.

This study has been carried out on a very large sample of franchises in Spain, looking at sectors and types of management positions and functional areas, and a comparison has been made with other Spanish and international studies that can undoubtedly open our eyes to the road ahead of us. It also shows the numbers of women franchisees by sector and by Autonomous Community.

An innovative study, with real and objective data on this business model, presented by the AEF, which Banco Sabadell has once again supported and given its backing for this great initiative. A good analysis of the current situation will in future reports help us to not only see a snapshot of each moment and make us aware of it, but also to see the evolution along the way.

This is one more step taken by the Spanish Franchisors' Association to learn more and more about this business system in order to continue advancing, growing and improving.

Congratulations!



Gorka Uranga
Director of Sales and Operations
of Mail Boxes Spain



The report "Women in Franchising in Spain" prepared by the AEF is an initiative that was created with the intention of reflecting on the presence of women in management positions in our sector and, based on the results, to make us reflect on how we can contribute to improving diversity and equality in our businesses.

The franchise sector in Spain currently employs 300,000 people, with an annual turnover of approximately EUR 30 billion, including a wide range of sectors and businesses. The data in this report can therefore be considered as broadly representative and its reading in future editions will give us a very clear picture of developments in this field.

At Mail Boxes Etc. we firmly believe in the value of diversity and equality as drivers not only of a fairer distribution, but also as drivers of improved management models and growth opportunities for both the business and the local community of which we are a part.

We are therefore proud and grateful to the AEF for having the opportunity to participate in this initiative and we are confident that in the coming years we will see a positive evolution and a greater presence of women in management positions. This will be very good news for everyone.

Conten

1. Women in Franchising. Spain 2021

2. The study consists of two parts:

A- Women in the management of franchising businesses.

B- Franchisees. Women in franchising networks

3. Conclusions

Women in Franchising. Spain 2021

The aim of this report is to clearly determine the degree of women's presence in business management positions and, more specifically, in senior management, both in franchising businesses and in franchised outlet networks.

This is the first study carried out in Spain to establish the main parameters and the degree of participation of the growing presence of women in business decision-making bodies in the world of franchising.

The evolution of Spanish society, the effects of recent social crises and the unstoppable empowerment of women in all areas -including the professional field- make it relevant to know the current situation of women in the Spanish franchise, in order to have new elements of analysis that favour the planning of the necessary policies of gender equality and equal opportunities in the businesses.

The study consists of two parts:

A. Women in the management of franchising businesses.

B. Franchisees. Women in franchising networks



Methodology:

The statistical universe we addressed was the total number of franchises operating in Spain, although for various reasons **4.4% of them were eliminated**, leaving the finite population to be studied at **1,320 businesses**.

All of them received a **questionnaire designed for telematic completion** and subsequently a multitude of telephone calls were made for advice and/or checking to verify data or correct errors.

The representative sample obtained gives –in statistical terms– a confidence level of 95 %, with an associated maximum error of ± 5 %.

Conclusions

- **67.5 %** of franchisor businesses have a **woman on their management bodies.**
- Women occupy **21.82%** of the currently existing **management positions** in franchising in Spain.
- In the 4 major sectors (Food, Beauty, Hospitality and Fashion) of franchising, women occupy **34.80 % of the managerial positions in franchising businesses.**
- In the world, women managers represent **-in all types of companies-** 31%; in Spain, 34%.
- 33.7% of managerial positions held by women are in the following categories **the Human Resources and Marketing Directorate.**
- Women franchisees make up **32.54 % of the total number of franchisees in Spain.**
- The 4 main sectors (Food, Beauty, Hospitality and Fashion) **have 50.95% of female franchisees.**
- 73.58 % of the female franchisees are in 4 autonomous Communities: **Andalusia, Catalonia, Madrid and Valencia.**

A- Women in the management of franchising businesses

The multi-sectoral factor of franchising means that there are significant differences in management teams, ranging from large businesses with a multitude of departments and therefore managers, to small, personal businesses with a lean structure. The result ranges from organisational charts with dozens of positions of responsibility to those with only 2 or 3 managers.

It should also be kept in mind that there are factors, such as the experience (seniority) of each business, the size of its franchise network and turnover volumes, which give a very heterogeneous overall result for the group studied.

For example, the table below shows the wide margin differential in the turnover segments indicated:

Franchising Centres

Turnover/year	% Businesses
more than EUR 100 million	10.45 %
from EUR 50 to EUR 99 million	5.97 %
from EUR 25 to EUR 49 million	19.40 %
from EUR 10 to EUR 24 million	20.90 %
from EUR 5 to EUR 9 million	11.94 %
less than EUR 5 million	31.34 %

These differences are reflected in the very composition of the different sectors of economic activity in which franchising is present and in the contribution of each of them in relation to the whole.

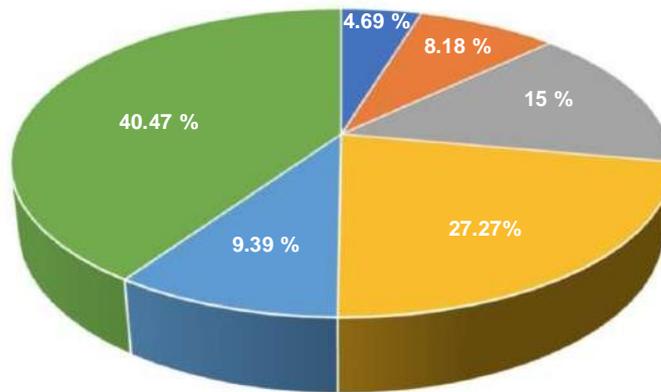
The following table shows how the 4 main sectors (taking into account their combined turnover and extension of the network of establishments) account for more than 50 % of the total, while the 5 service sub-sectors and all the other sectors - none of which exceed 5.5 % - account for the other half.

Food **Beauty and beauty salons** **Hospitality ·** **Fashion**

% of enterprises by sector grouped together

Food	4.69 %
Beauty and Beauty Care	8.18 %
Hospitality	15.00 %
Fashion	22.27 %
	50.14 %
Services	9.39 %
Others	40.47 %

This again demonstrates the enormous disparity between the businesses that make up the Spanish franchise system as a whole, and for this reason, they have been studied in particular on this occasion.



■	Food
■	Beauty and beauty salons
■	Hospitality
■	Fashion
■	Services
■	Others

From the data obtained, we know that in the 1,320 businesses surveyed there are a total of 10,296 members of their management committees, of whom 2,247 are women. As can be seen from the following table:

There are 32.5 % of businesses that do not yet have female managers.

Women occupy 21.82% of the currently existing management positions in franchising in Spain.

In the 662 businesses in the 4 main sectors, they account for 34.80 %.

In the total of the 891 businesses with women managers, they account for 33.33 %.

Women managers in absolute numbers and % of women in management positions

Large sectors	Total Businesses	Positions Managers	Female Managers	%
Food	62	930	309	33.23
Beauty and Beauty Care	108	678	294	43.36
Hospitality	198	1881	649	34.50
Fashion	294	2,293	760	33.14
Subtotal	662	5,782	2,012	34.80
Remaining sectors	229	940	235	25.00
Total sectors	891	6,722	2,247	33.33

Businesses without women managers:				
	429	3,574	0	0.00
Totals	1,320	10,296	2,247	21.82

It is important to note that the average number of members of a business's management committee varies from sector to sector, ranging from an average of 15 members in the food sector to 3 in some of the less representative sectors, which fall under the heading of "other sectors".

If instead of the total of 1,320 businesses, we refer only to the 891 businesses that claim to have women in management responsibilities, we would be talking about a total of 6,722 managers and, in this case, the representativeness of the 2,247 women reported is **33.33 %**.

On the other hand, returning to the group of the 4 main sectors to which we have already referred, we find some very interesting data: **34.80 %** of female participation, considering the role played by these sectors in the Spanish franchising sector as a whole.

Here the percentages of women managers out of the total number of existing positions are similar -in the case of **Beauty and beauty salons** it reaches **43.36%**, a percentage that is logical considering the profile of the businesses that comprise it.

We can speak of 4 engines that are strongly driving franchising and that, in the current evolution of the franchising market, present -as a whole- perspectives to continue in this line.

In the 4 major sectors of franchising, women occupy 34.80 % of the managerial positions in franchising businesses.

The difference between this 34.80% of the 4 dominant sectors and the final figure of 21.82% for the 1,320 businesses analysed can be explained by 2 powerful reasons:

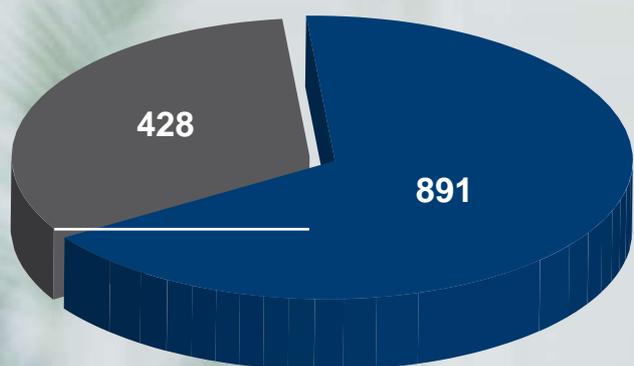
A. The lower contribution, 25%, of the remaining sectors where the presence of "young" businesses, still in the preliminary stages of expansion through franchising, maintains an average of 4 managerial staff per company of 4 managerial staff per company.

B. 32.5% of businesses have not yet incorporated any women in their management bodies. The weight of these companies drags down the final percentage obtained.

67.5 % of franchising businesses have a woman on their management bodies.

Franchising Businesses

- Businesses with women Managers
- Businesses without women managers.



Management positions occupied by women

The definition of management positions was made based on a proposed list of 11 possible specialisations, but offering the businesses consulted the possibility of expanding them and/or adjusting them to their own definitions.

On this basis, a total of 19 possible responses were obtained, as follows:

MANAGEMENT POSITIONS
Management
Quality
CEO/Director
Commercial
Compliance
Purchases
Communication
Corporate controller
Digital
Expansion
Finance
Training
Franchises
IT
Legal
Marketing
Works
Operations
HR

The organisational charts of each business are logically different, but the distances between them can be very large, depending on the size of the businesses themselves.

Although the final average of a management committee is less than 8 people, responses were received indicating that, for example, one organisation had a total of 49 managers, another 45 and another 25. Clearly, there are 3 exceptions, but this is noted for the record - again- of the enormous heterogeneity of the franchise as a whole.

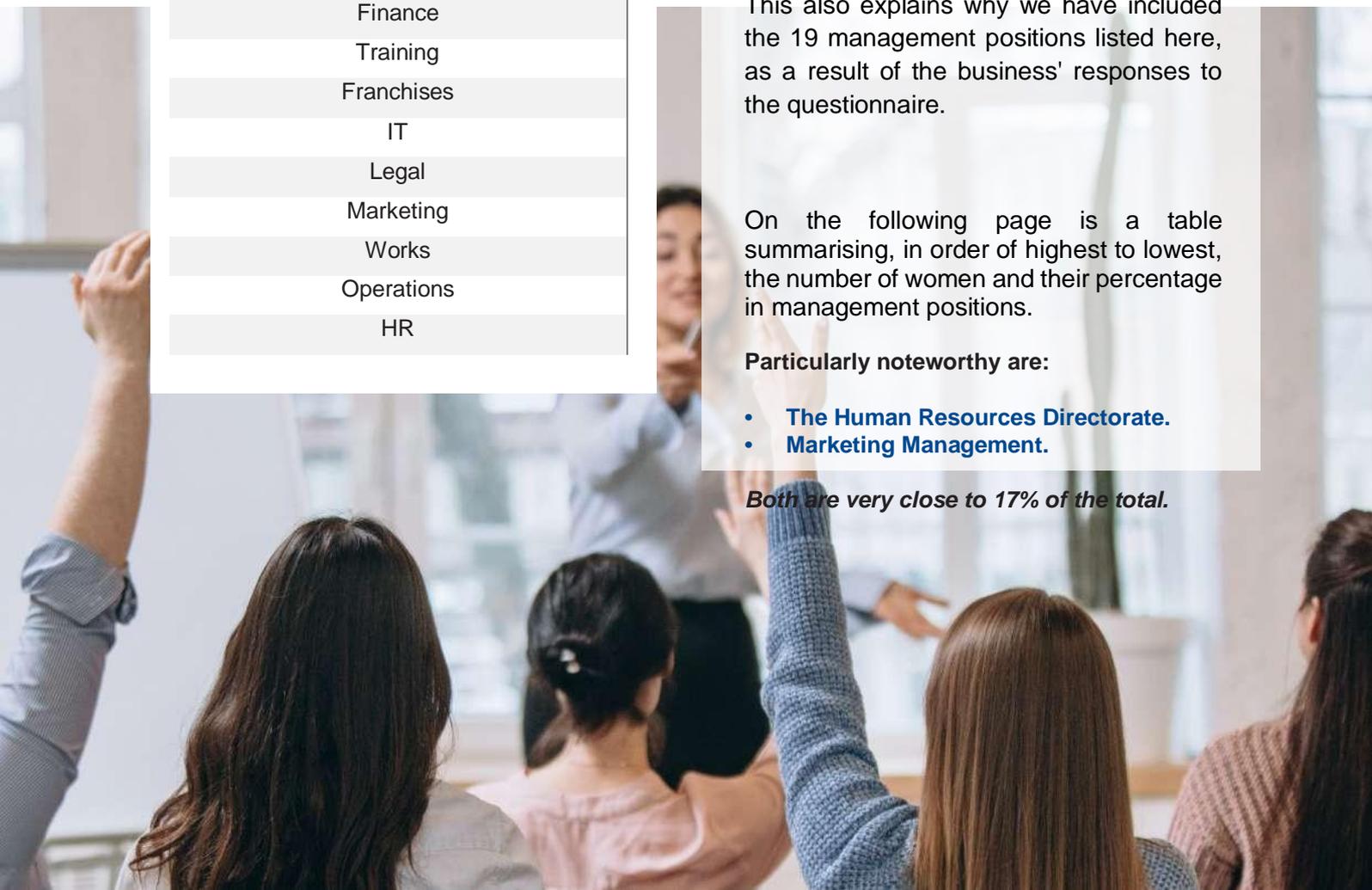
This also explains why we have included the 19 management positions listed here, as a result of the business' responses to the questionnaire.

On the following page is a table summarising, in order of highest to lowest, the number of women and their percentage in management positions.

Particularly noteworthy are:

- **The Human Resources Directorate.**
- **Marketing Management.**

Both are very close to 17% of the total.



Management positions	Women	%
HR	380	16.9%
Marketing	378	16.8%
CEO/Director General	228	10.2%
Communication	207	9.2%
Corporate controller	195	8.7%
Operations	173	7.7%
Franchises	148	6.6%
Expansion	139	6.1%
Commercial	138	6.1%
Finance	74	3.3%
Legal	35	1.6%
IT	33	1.5%
Training	26	1.2%
Purchases	21	1.0%
Compliance	20	0.9%
Quality	19	0.8%
Works	12	0.5%
Digital	11	0.5%
Management	10	0.4%
Total Turnover	2,247	100.0%

To better analyse the above table, we will refer to the report "Women in Business Management 2019" by the International Labour Office (ILO), which, after consulting nearly 13,000 businesses in 70 countries around the world, concludes that **there is a clear occupational segregation, with a higher presence of women in functional areas (HR; Marketing, for example) of support and much less in strategic management areas.**

The 33,7 % of managerial positions held by women are in Human Resources and Marketing Management.

Difficult comparisons

As this is a first study, we wanted to compare the data in this report on the presence of women in the management of franchise businesses with other entities or organisations that carry out research on gender equality in the workplace.

As mentioned above, the first difficulty arises from the enormous structural differences that exist in the world of franchising, in which large businesses coexist with medium-sized businesses and entrepreneurs who have just started their project; also because of the existence of specific positions -such as, for example, the Franchise Management itself-, which do not exist outside this environment and, finally, because of the different approaches of the studies consulted.

Even so, we do not renounce presenting some comparisons, as we believe that they may be valid for a correct approximation of the current situation of women in relation to management positions in franchising businesses.

We have focused on 2 studies. The first is the Female Talent 2020 Report, recently published by Eada Business School and ICSA Group; the second is the document Women in Business 2021 by the consultancy firm Grant Thornton Corporation.

The Eada-ICSA study, in particular, offers a section dedicated to the "share of women in management", which allows us to compare the percentages referring to 4 management positions, in particular;

% of women in each case

Positions	AEF	E-I
HR	16.9	32.5
CEO/General Management	10.2	8.7
Commercial	6.1	7.7
Administration + Finance	3.7	19.6

Please note that the first column refers to franchises and the second to all types of businesses -small, medium and large-, both commercial and industrial, which relativizes the comparison. Women in Business 2021 is a global study that provides data from all over the world and from different regions.

We believe that it can give an indication of where the evolution of women in management is heading, although it also considers the negative effects of the Covid-19 pandemic, with the changes in the form and place of work that it has generated for the promotion of women in the professional sphere.

The Women in Business 2021 study was carried out by analysing businesses with between 50 and 500 employees in 32 countries.

Comparative data with the Grant Thornton report are as follows:

	World*	Spain*	Franchisees**
Women in managerial positions	31%	34%	21.82%
HR	38%	35%	16.90%
Financial	36%	32%	3.30%
CEO/General Management	26%	23%	10.20%
Operations	22%	24%	7.70%
Marketing	23%	25%	16.80%
IT	21%	12%	1.50%
Commercial	19%	14%	6.10%
Corporate controller	16%	8%	8.70%

***Women in Business data**

**** own data, referring to all franchisor businesses**

B- Franchisees.

Women in franchising networks

According to the latest statistics on franchising in Spain, franchisors have 25 % of their own establishments and 75 %, totalling 58,032, are owned by their franchisees.

The result of our study indicates that the total number of women franchisees is 18,884, which represents a 32.54% of all franchisees.

By sector, Beauty and beauty salons is in first place, which suggests the predominantly female character of the type of businesses that form part of this sector. It is followed by the other 3 major sectors already outlined: Hospitality, Food and Fashion.

From here, 6 other sectors - very different from each other - appear, with a share of more than 4 % of the total number of franchisees.

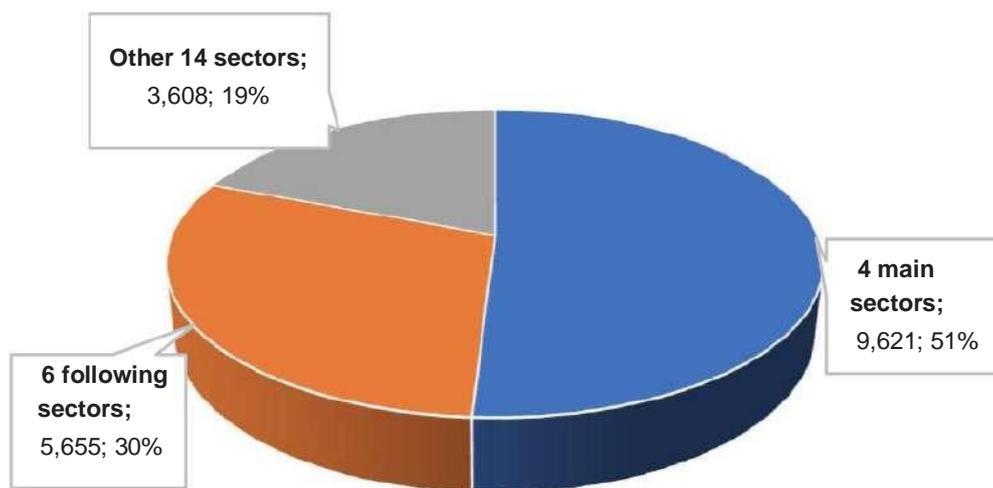
A further 14 sectors form a group in which none of them exceeds 4%. The 3 blocks thus constituted contribute 50.95%, 29.95% and 19.10% respectively.

Franchisee Sectors %		
Beauty/Beauty Salons	2,709	14.35
Hospitality	2,605	13.79
Food	2,390	12.66
Fashion	1,917	10.15
Services	1,225	6.49
Telecommunications	1,110	5.88
IT/Labelling/Printing	883	4.68
Travel Agency	872	4.62
Real Estate Agencies/Farm Management	807	4.27
Teaching-Training	758	4.01
Other 14 sectors*	3,608	19.10
(*with share of each <4 % of total)	18,884	100.00

Grouping of the above data into 3 large blocks:

	Franchisees	%
4 main sectors	9,621	50.95
6 following sectors	5,655	29.95
Other 14 sectors	3,608	19.10

Women Franchisees



Women Franchisees. Sectors.

Beauty/Beauty salons	2,709
Hospitality	2,605
Food	2,390
Fashion	1,917
Telecommunications	1,225
Services	1,110
IT/Labeling/Printing Travel	883
Agencies	872
Real Estate Agencies/Farm Management	807
Teaching-Training	758
Other 14 sectors*	3,608

Grouping of the above data into 3 large blocks:

The data on women owners of franchised companies have been provided by the franchising businesses consulted, in terms of both their number and their location by Autonomous Community.

AC	Franchisees	%total
Andalusia	1,972	10.44
Aragon	612	3.24
Asturias	215	1.14
Balearic Islands	525	2.78
Canary Islands	87	0.46
Cantabria	212	1.12
Castilla-La Mancha	151	0.80
Castile and León	198	1.05
Catalonia	4,936	26.15
Extremadura	423	2.24
Galicia	939	4.97
La Rioja	106	0.56
Madrid	5,157	27.31
Murcia	255	1.35
Navarre	361	1.91
Basque Country	844	4.47
Valencian Community	1,885	9.98
Ceuta/Melilla	6	0.03
	18,884	100.00

These 4 communities represent 59.18% of the Spanish population.

73.88 % of the female franchisees are in 4 autonomous communities: Andalusia, Catalonia, Madrid and Valencia.

Finally, for a more in-depth analysis, we also believe it is of interest to give an account of the weight of the female franchisee segment in relation to the total number of franchisees in each of the Autonomous Communities, both in absolute numbers and as a percentage.

AC	Franchisees	A (%)	(B)**
Andalusia	1,972	4,556	43.28
Aragon	612	1,331	45.98
Asturias	215	416	51.68
Balearic Islands	525	1,709	30.72
Canary Islands	87	180	48.33
Cantabria	212	577	35.74
Castilla-La Mancha	151	411	36.74
Castile and León	198	619	31.99
Catalonia	4,936	17,675	27.93
Extremadura	423	866	48.85
Galicia	939	1,600	58.69
La Rioja	106	256	41.41
Madrid	5,157	19,455	26.51
Murcia	255	568	44.89
Navarre	361	537	67.23
Basque Country	844	2,234	37.78
Valencian Community	1,885	4,985	47.81
Ceuta/Melilla	6	57	10.53
	18,884	58,032	

(A)* Total number of franchisees in each Autonomous Community.

(B)** percentage of female franchisees/total franchisees in each Autonomous Community.

In order to assess the data expressed in this table, it should be kept in mind that the figure of 58,032 franchisees is equivalent to 74.57% of the total number of franchise network establishments operating in Spain. The other 25.43% corresponds to the 19,787 outlets owned and operated directly by the franchisors.

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