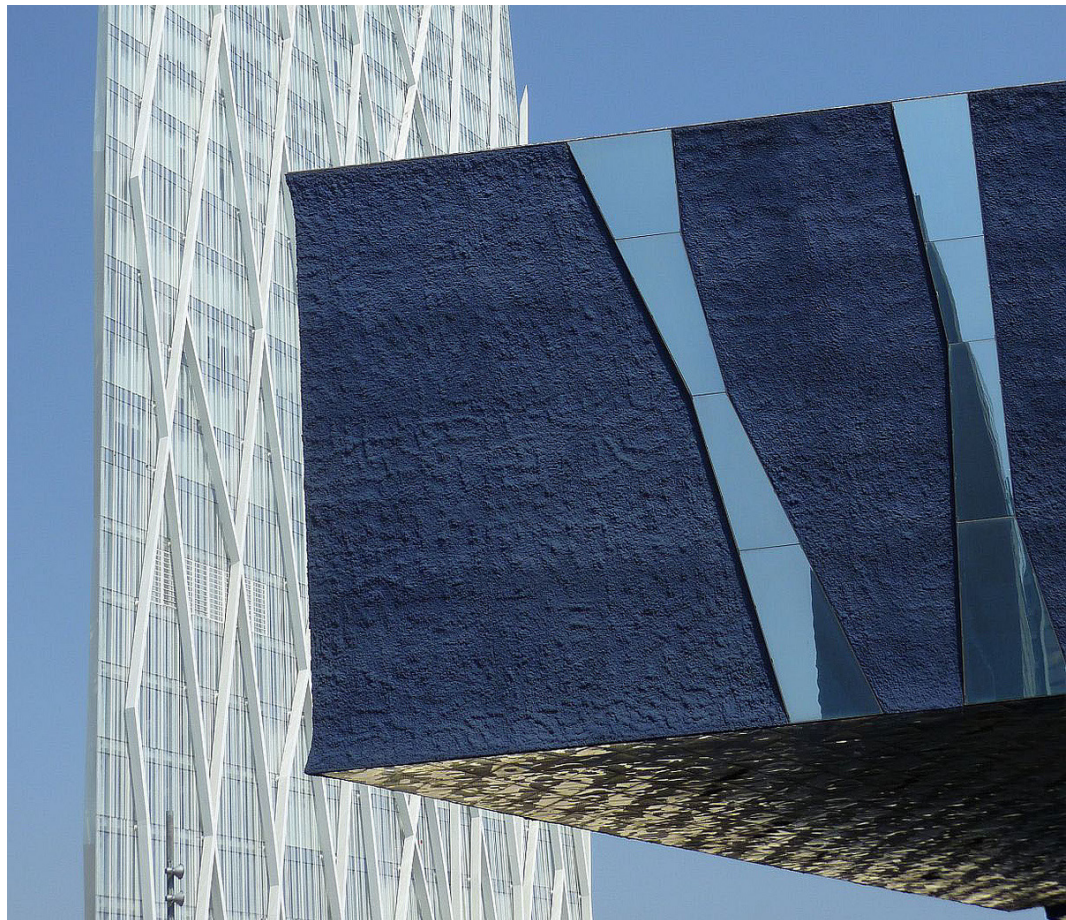


Barcelona Global's

International Professional Talent Monitor 2013

Work, Business and Life in Barcelona



Barcelona Global is a private, independent and not-for-profit civil society platform made of business leaders, professionals and entrepreneurs committed to make Barcelona one of the most attractive cities in the world for business and talent.

Our mission is to make Barcelona one of the most attractive cities in the world for business and talent.

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With the support of the following facilitators

Chambers of Commerce and other Trade Institutions

Austrian Chamber of Commerce
Advantage Austria, Belgium-Luxembourg Chamber of Commerce, French Chamber of Commerce, Italian Chamber of Commerce; Dutch Kring Nederlands Bedrijfsleven, KDF Circulo de Habla Alemana, ESADE-Creapolis; Acc10-Invest in Catalonia, Barcelona Activa.

Corporations

Puig, ISDIN, Orangina-Schweppes, Banc de Sabadell, Everis, Cuatrecasas Gonçalves Pereira Law Firm, Deloitte, Sonar, Barcelona Relocation Services.

Academic and Research Institutions

ESADE Business School, IESE Business School, Barcelona Graduate School of Economics; BSC Barcelona Super Computing Center; ICFO Institute of Photonic Sciences; ICN The Catalan Institute of Nanotechnology; IRB Institute for Research in Biomedicine; PRBB Barcelona Biomedical Research Park (including CRG Centre for Genomic Regulation, UPF University Pompeu Fabra, IMIM Hospital del Mar Medical Research Institute, CREAL Centre for Research in Environmental Epidemiology, and CMRB Centre for Regenerative Medicine of Barcelona) and ICREA Catalan Institution for Research and Advanced Studies.

And lastly through individual partners and people associated to Barcelona Global.

Methodological Aspects	Executive Summary by Barcelona Global	Respondents' profile
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1	3	6
Coming to Barcelona	Working in Barcelona	Doing business in Barcelona
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8	10	11
		Life in Barcelona
		<hr/>
		14

Methodological Aspects

Barcelona Global's International Professional Talent Monitor 2013 was conducted under the **scientific direction** of Dr. Francisco J. Granados (Institut Barcelona d'Estudis Internacionals), who was supported by Ludovica Maglione Piromallo, Projects Director of Barcelona Global, Research Associate (International Lawyer with LL.M. Columbia University NYC, and extensive work experience in U.S.A.).

The Monitor examines the strengths and weaknesses of Barcelona to attract and retain international professional talent. The survey's questionnaire is structured in seven sections: reasons to come to Barcelona; work in Barcelona; doing business in or from Barcelona; social integration in Barcelona; educational/school system; living conditions of the city; and leaving Barcelona.

Respondents answered 238 questions in total, 68% of which (grouped under 16 big thematic questions) asked to rate issues based on importance / satisfaction, 25% were open questions, and 7% multiple choice. Remarkably, respondents entered more than 2500 free comments, either in the open questions or in the free comment boxes associated to the 16 big thematic questions. Due to its breadth, the analysis of these comments is not reported in this executive summary and it is the object of a separate report.

The Monitor was distributed to 1,556 potential respondents, with a robust **answer rate of 21%** (326 respondents).

Respondents answered the survey between May 10 and June 10 2013. The online system designed to complete the survey fully warranted the anonymity of respondents' participation and their responses.

Lacking a database of international talent professionals living and working in Barcelona, Barcelona Global approached a number of organizations that employ or serve

international talent in Barcelona, which collaborated in distributing the Monitor. This is the full list of distribution facilitators: 9 international trade agencies and chambers of commerce (313 internationals with various professional profiles): Austrian Chamber of Commerce Advantage Austria, Belgium-Luxembourg Chamber of Commerce, French Chamber of Commerce, Italian Chamber of Commerce; Dutch Kring Nederlands Bedrijfsleven, KDF Circulo de Habla Alemana, ESADE-Creapolis; Acc1Ò-Invest in Catalonia, Barcelona Activa; 7 corporations, members of Barcelona Global (180 international corporate professionals): PUIG, ISDIN, Orangina-Schweppes, Banc de Sabadell, Everis, Cuatrecasas Gonçalves Pereira Law Firm, Deloitte, Sonar, Barcelona Relocation Services; 9 research centers, members of Barcelona Global (439 researchers and Ph.D.'s) and 4 Universities (295 professors and Ph.D.'s); ESADE Business School, IESE Business School, BGSE Barcelona Graduate School of Economics; BSC Barcelona Super Computing Center; ICFO Institute of Photonic Sciences; ICN The Catalan Institute of Nanotechnology; IRB Institute for Research in Biomedicine; PRBB Barcelona Biomedical Research Park including CRG Centre for Genomic Regulation, IMIM Hospital del Mar Medical Research Institute, CREAL Centre for Research in Environmental Epidemiology, UPF University Pompeu Fabra and CMRB Centre for Regenerative Medicine of Barcelona; and lastly ICREA Catalan Institution for Research and Advanced Studies; 13 persons associated to *Barcelona Global* who requested the participation in the survey to international talent professionals they knew personally (329 individuals of various professional profiles).

The research associate conducted **19 interview sessions** between March and April 2013 with selected international professionals living in Barcelona (lasting 2-4 hours each, for a total of 45 hours). The purpose of these sessions was to recognize the challenges/issues most

commonly raised by foreigners in Barcelona, and convert the most pertinent and relevant ones into user-friendly questions. The research director made several other interviews during a previous stage of the project.

Literature on cities' performance (reports, rankings, and expat surveys concerning cities) was a secondary source of information to decide the topics and indicators that the Monitor had to inquire about (see bibliography below).

13 pilot sessions of the questionnaire were then performed between May 1 to May 10 with selected potential respondents to improve the wording of the questions and the survey's "user friendliness" (20 hours).

Finally, the quantitative results of the Monitor were examined by the project team (Gonzalo Rodés, Mateu Hernández, Francisco Granados and Ludovica Maglione Piromallo), during three work sessions: one closed doors, a second with partners of Barcelona Global (Josep Lluís Sanfeliu – Ysios Capital; Lluís Serrano – Director at CRG; Gabriele Schiavon – la Granja Design; Ricard Robles – Sonar; Sandra Sans – Everis), and a third with all members of the Board of Barcelona Global on June 21 2013.

The Monitor surveys international talent living and working in Barcelona: corporate executives, businessmen, entrepreneurs, investors, academics, researchers, freelance professionals. These professionals are characterized by their high international mobility and capability of exploring comparative work opportunities in various world cities. *Barcelona Global* aims at helping Barcelona to stand out in the global competition of attracting and retaining these professionals. The Monitor should stimulate and inform the debate on international talent within *Barcelona Global*, which may result in insights on city shortcomings and priorities that policy makers should address.

This Monitor targets multiple purposes: to examine various areas of urban performance and offer a diagnostic of strengths and weaknesses of Barcelona in attracting and retaining international talent; to encourage potential international professionals to move to Barcelona; to illustrate to citizens "home truths" not necessarily apparent; to stimulate and build strategic discussion within the association *Barcelona Global*; to provide insights and drive policy debate on the city shortcomings and priorities and persuade policy makers to take action.

Ideally this Monitor should not be a one-off exercise but be repeated yearly or every other year to track the output of policy reforms on city performance.

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Executive Summary by Barcelona Global

The International Talent residing in Barcelona likes Barcelona, however there is room for improvement in terms of openness of the Barcelonan society towards the international talent

1. A majority of respondents would encourage other international professionals to move to Barcelona for professional reasons.
2. Respondents rate neutrally their feeling of belonging to Barcelona's society.
3. Barcelona achieves remarkable scores in indicators of quality of life, especially weather, but also cultural attractions, private healthcare system, presence of an international community, art performances, quality of public spaces / services, tolerance of people, and quality of education, where surveyed rate they are either "somewhat" or better, "quite satisfied".
4. These good social attributes shield Barcelona from downgrades in other areas of city reputation. As far as housing offer in Barcelona goes, there is room for improvement in so far that respondents are "somewhat dissatisfied" with both price of housing for rent and price of housing for sale, while they feel neutral with housing quality.

A city well positioned for business leaders, entrepreneurs and investors and yet an uneasy city to start a business

5. Respondents with an executive position in a firm, as well as entrepreneurs and investors were thoroughly surveyed about local business climate and ease to start, run or invest in businesses in Barcelona. Results show that the city offers fairly good conditions in terms of international connectivity, quality of universities and research centers, shaping a world class workforce, money for value of office space, easiness

of attracting new international talent, qualified local workforce and competitiveness of labor cost.

6. The role of higher education and connectivity, earning praise to Barcelona's business environment, compensates for more critical assessments among the same audience in the survey. Business executives, entrepreneurs and investors voice their discontent about the general easiness of starting-up and running a firm in Barcelona, access to funding, rigidity of labor laws, obtaining activity licenses and work permits, socio-political climate in Barcelona, and public assistance to entrepreneurship. Some institutional economic agencies of the city score an equally modest achievement.

The International Talent isn't satisfied with access to funding (credit, investments, grants) at business and research level, as well as with corporate tax

7. The Monitor detects that international professionals based in Barcelona are not immune to shrinking of liquidity for entrepreneurial initiatives and projects, in the context of an economic crisis and poor access to credit and funding. Indeed they rate themselves "quite dissatisfied" with funding for businesses both at start up and later phases as well as "somewhat dissatisfied" with public financing for research projects. On the opposite side of the spectrum, investors scouting for good business opportunities also feel "somewhat dissatisfied" with investment opportunities.
8. Competitiveness of corporate taxation relative to other countries also receives a rate of "somewhat dissatisfied" by executives, entrepreneurs and investors, a data that proves instructive since it is coming from a population with international corporate benchmarking experiences.

Barcelona is depicted as a relatively creative city that needs to keep on track to build excellence in work

9. Barcelona Global's International Professional Talent Monitor also features good results in terms of the city's professional environment for work, definitively a drive factor for the international talent towards the city. Surveyed are "somewhat satisfied" with the recognition of (their personal) credentials and qualifications and are impressed with creativity in Barcelona. The embedded entrepreneurial spirit of Barcelona is rated on a par with dynamism and the use of English in their professional environment, all rated neutrally, "neither satisfying nor dissatisfying".
10. Finally, there is room for improvement in two important economic aspects affecting employees, who hold themselves "somewhat dissatisfied" in terms of competitive salary relative to other countries and individual income tax rate in Spain.

Education is a key factor in positioning Barcelona

11. For professionals with children, education is a foremost influential feature of a city's capability to attract and retain them, because respondents rate the importance of quality of education as a "very important" factor. However when grading their satisfaction with Barcelona's current "quality of education", respondents express that they are just "somewhat satisfied". The education in English is deemed as "quite important" and respondents are "somewhat satisfied" with its current offer. The education in Spanish is also rated as "quite important" and respondents feel "neutral, neither satisfied nor dissatisfied" with its current offer. "Education in Catalan" is rated as "somewhat unimportant" and its current offer in the city as "neutral,

neither satisfied nor dissatisfied". The international talent residing in the city also deems important non-Spanish curricula (American, French, German...) and the International Baccalaureate.

Catalan language in Barcelona is not affecting the respondents' experience in a decisive manner

12. As far as the current linguistic situation in Barcelona goes, the results highlight that respondents had little perception ("somewhat unknown") before moving to Barcelona of the actual use of Catalan language in public schools, administration and workplace environments.
13. Asked on how the importance of Catalan language in Barcelona is affecting their experience in Barcelona, only a 16.8% of respondents manifest a high or very high discontent. For a third of respondents Catalan poses a higher adaptation challenge but they can cope with it (37.7%), and the rest of respondents either declare that they are not affected in any relevant way (22.4%) or that Catalan even enhances their personal experiences (22.2%).

Bureaucratic Paperwork is perceived as difficult, with little clarity and efficiency, yet the positive experience of city hall registration opens the way to potential solutions

14. One of the areas where there is room for improvement is how public administrative agencies deal with the international talent living and working in Barcelona. Besides the above mentioned bureaucracy related to starting and running businesses, clarity of information and efficiency of some administrative procedures required to settle in the city can be improved; indeed, except for local registration with the

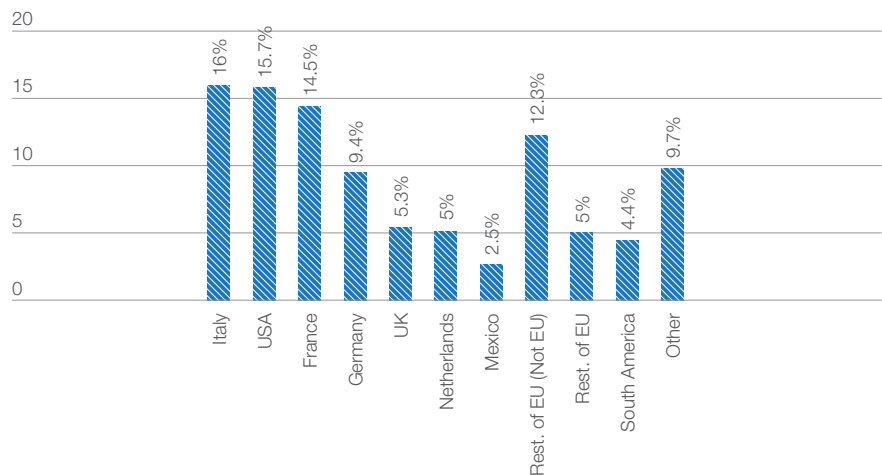
city council (“Empadronament”) which is perceived by respondents as a “somewhat efficient”, work permits, the procedure for foreign identification number (NIE), and public health coverage registration are rated neutrally, obtaining visas and residence permits are rated “somewhat inefficient”, while converting a driver’s license scores as “quite inefficient”.

Quantitative Results of Barcelona Global's International Professional Talent Monitor 2013

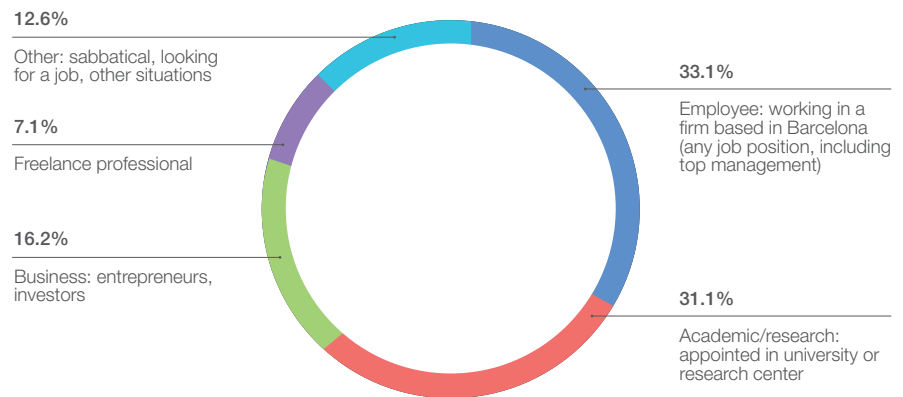
Work, Business and Life in Barcelona

Respondents' profile

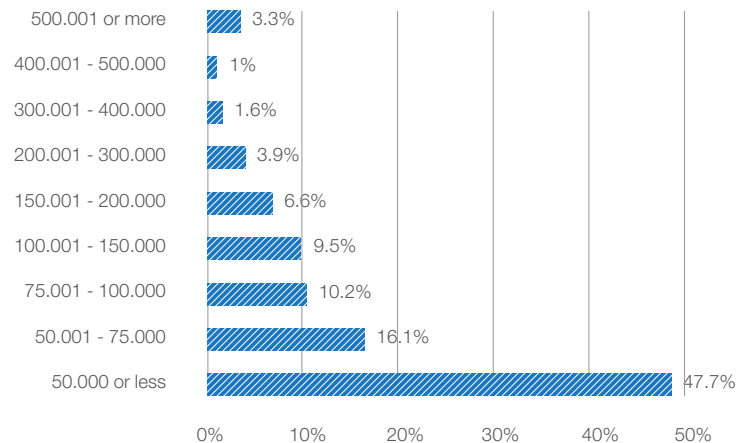
Respondents' Nationalities



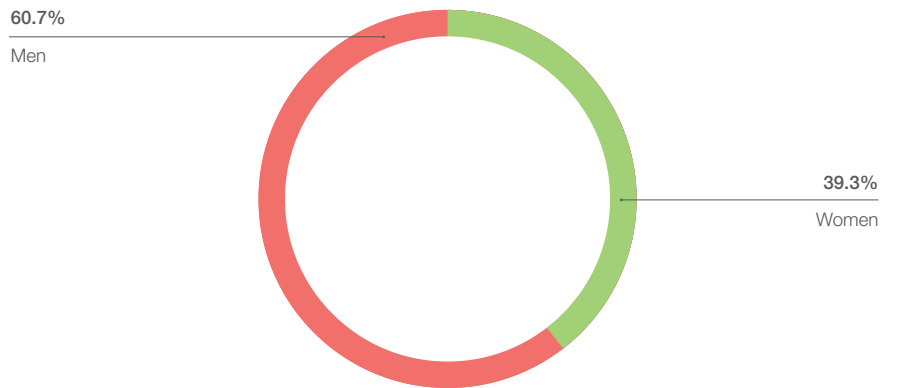
Respondents' professional profile



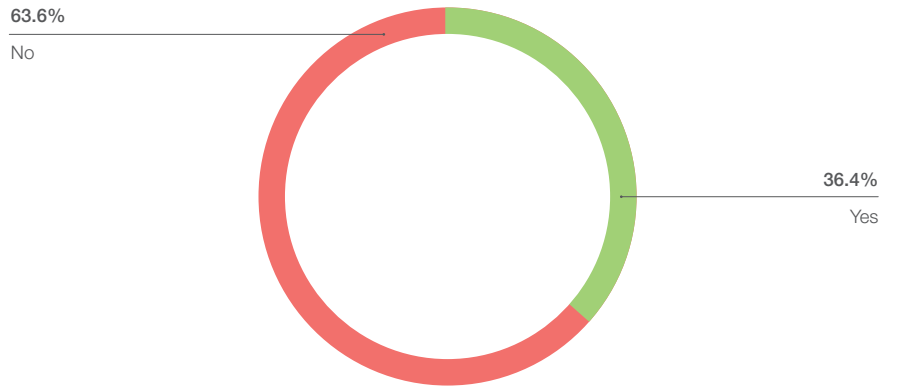
Individual annual income levels (Euros)



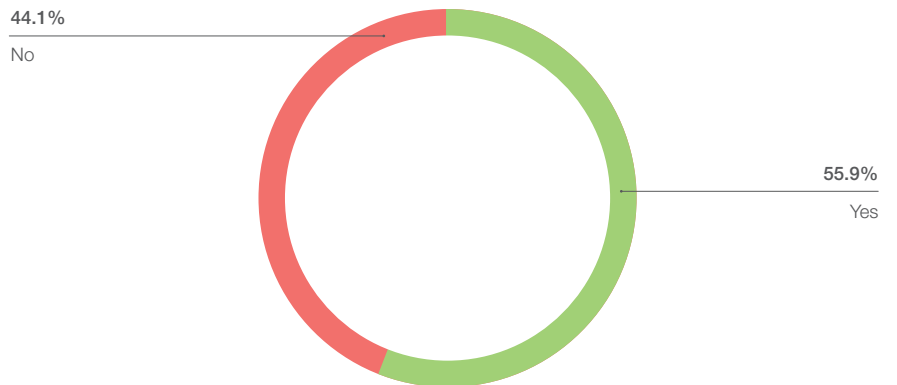
Gender



With children who were younger than 25 when they moved to Barcelona

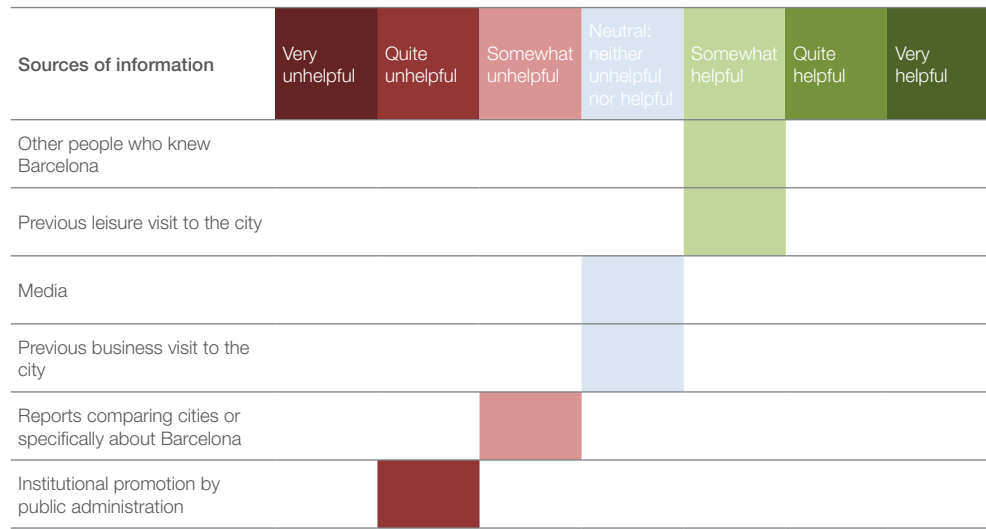


Came with a spouse or partner when moved to Barcelona

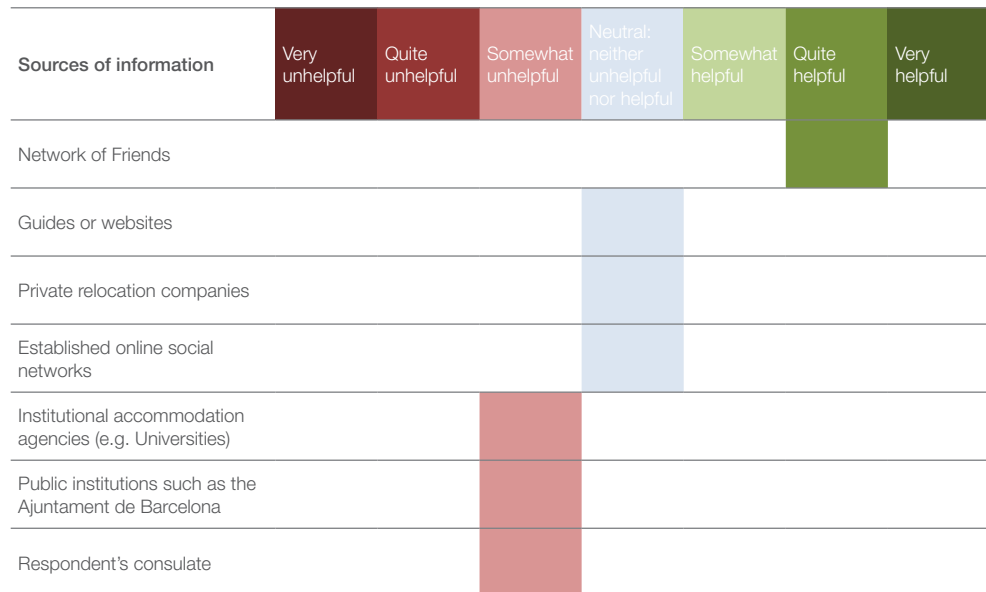


Coming to Barcelona

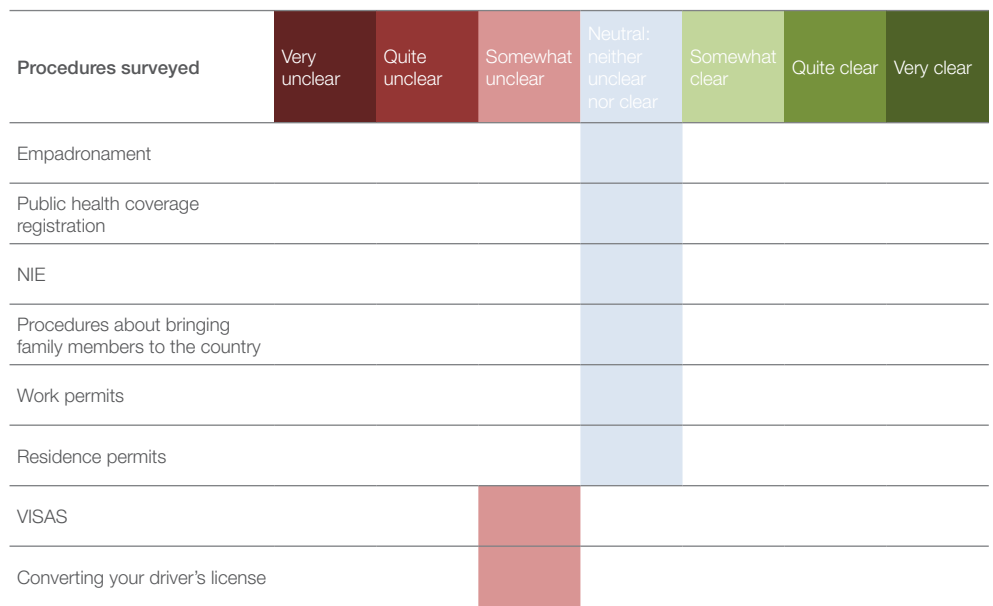
Before coming to the city, how helpful were each of the following information sources to learn about professional and lifestyle / living conditions in Barcelona?



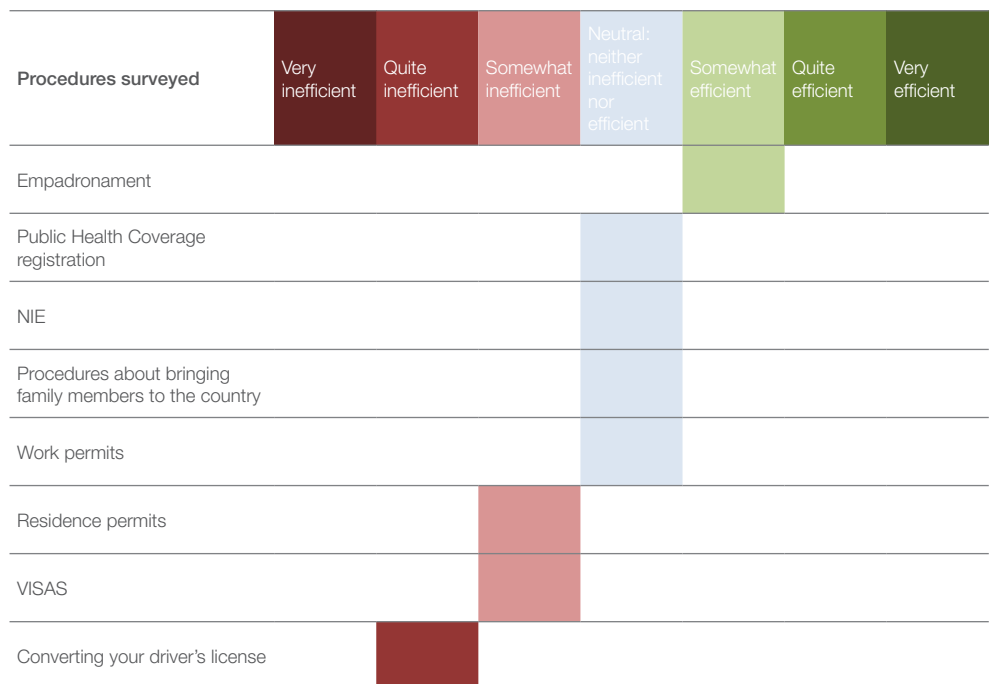
How helpful were each of the following sources of information and assistance during your initial months in the city?



Rate the clarity of information about the following administrative procedures required to settle in Barcelona



Rate the efficiency of the following administrative procedures required to settle in Barcelona



Working in Barcelona

Rate your level of personal satisfaction with each of the following professional issues

Issues surveyed	Very dissatisfied	Quite dissatisfied	Somewhat dissatisfied	Neutral: neither dissatisfied nor satisfied	Somewhat satisfied	Quite satisfied	Very satisfied
Recognition of credentials and qualifications							
Professional culture: creativity							
Local curiosity & openness towards international professionals							
Easiness of making professional connections							
Use of English in my professional environment							
Professional culture: dynamism							
Professional culture: entrepreneurial spirit							
Overall satisfaction with professional conditions							
Fair and merit-based possibilities of career advancement							
Professional culture: accountability and efficiency							
Professional culture: effective leadership							
Financing for research projects from Spanish science institutions							
Competitive salary relative to other countries							
Individual income tax rate in Spain							

Doing business in Barcelona

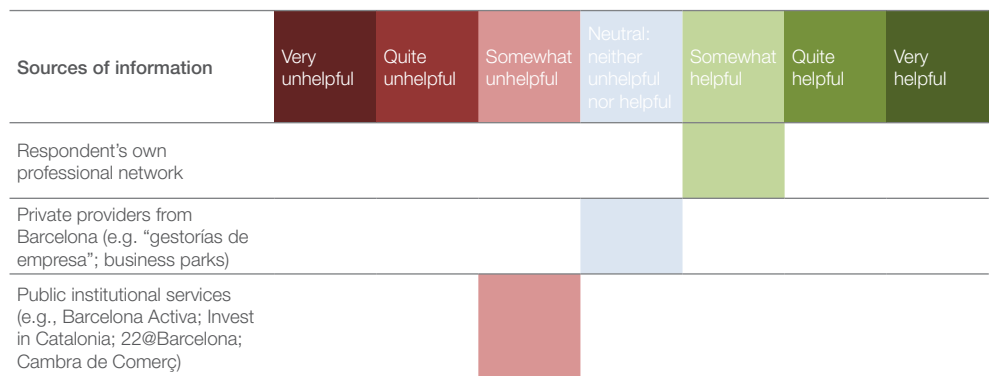
Rate your level of personal satisfaction with each of the following aspects concerning doing business in Barcelona

Issues surveyed	Very dissatisfied	Quite dissatisfied	Somewhat dissatisfied	Neutral: neither dissatisfied nor satisfied	Somewhat satisfied	Quite satisfied	Very satisfied
Infrastructure for international connectivity of the city					■		
Quality of universities and research centers in Barcelona					■		
Office space (availability, quality and competitive cost)					■		
Easiness of attracting new international talent to the city				■			
Competitiveness of labor cost				■			
Availability of qualified local workforce				■			
Easiness of collaboration between firms and universities/ research centers				■			
General easiness of managing a firm in Barcelona				■			
Overall personal satisfaction in my experience of starting-up a business in Barcelona				■			
Overall personal satisfaction in my experience of running a business in Barcelona				■			
Assistance to entrepreneurship from public administrations			■				
Provisions of work permits to foreigners from the administration			■				
Provisions of licenses and activity permits from the administrations			■				
Existence of a good public policy for international business attraction			■				

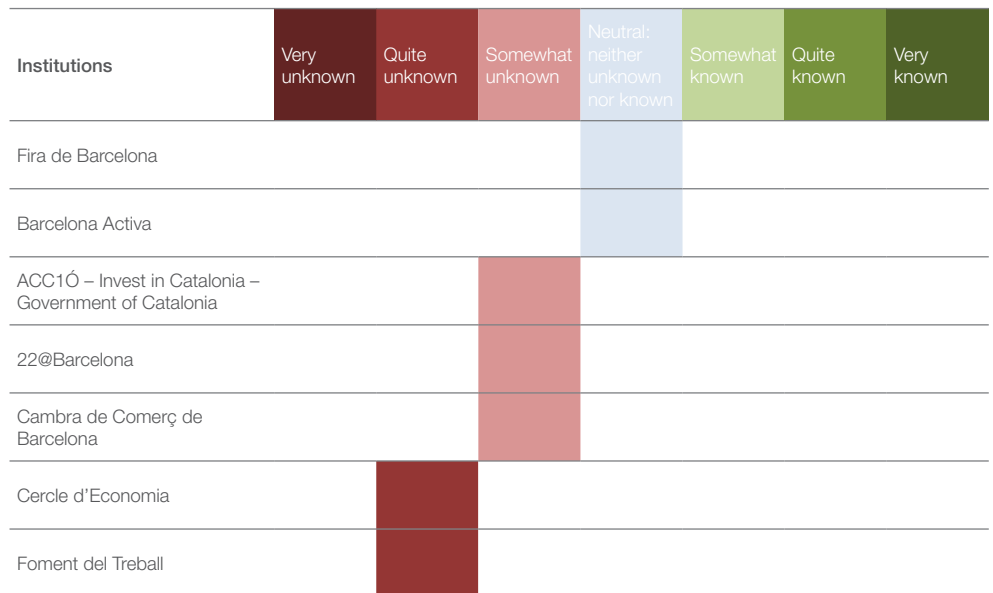
Rate your level of personal satisfaction with each of the following aspects concerning doing business in Barcelona (II)

Aspects surveyed	Very dissatisfied	Quite dissatisfied	Somewhat dissatisfied	Neutral: neither dissatisfied nor satisfied	Somewhat satisfied	Quite satisfied	Very satisfied
Availability of public websites, forms and applications written in English							
Socio-political climate in Barcelona							
Available investment opportunities for investment firms							
Competitiveness of corporate taxation relative to other countries							
English proficiency of the local workforce							
Flexibility in local labor laws							
General easiness of starting-up a firm in Barcelona							
General easiness of investing in a firm of Barcelona							
English proficiency of public officials							
Available credit from local private financial institutions to finance business							
Available funding for start-ups from investors located in Barcelona							

How helpful were to you the following sources of information and assistance in setting up your business in Barcelona?



How much do you know about the following institutions of Barcelona?



Life in Barcelona

Indicate your level of social integration with the local people, and your overall feeling of belonging to Barcelona's society

Issues	Not at all integrated / feeling of belonging	Quite not integrated / feeling of belonging	Somewhat not integrated / feeling of belonging	Neutral: neither not integrated / feeling to belong nor the contrary	Somewhat integrated / feeling of belonging	Quite integrated / feeling of belonging	Very integrated / feeling of belonging
Level of social integration with local people from Barcelona							
Overall feeling of belonging to Barcelona's society							

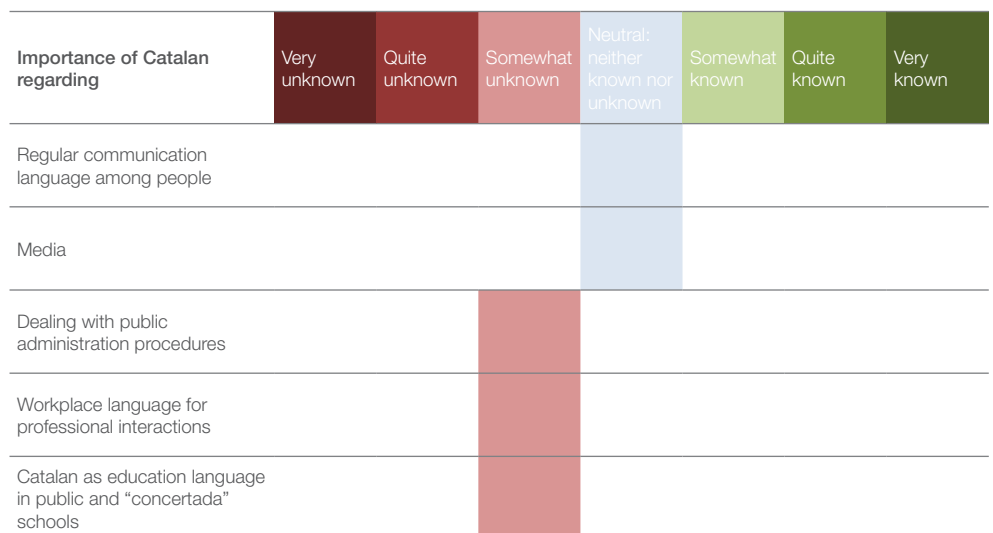
Rate the following challenges in adjusting to life in Barcelona

Challenges	A very difficult challenge	Quite a difficult challenge	Somewhat a difficult challenge	Neutral: neither a difficult nor an easy challenge	Somewhat an easy challenge	Quite an easy challenge	Not at all a challenge
Language barrier because of my poor knowledge of Spanish							
Family adaptation to life in Barcelona							
Difference between my cultural values, norms and habits and those of the local people from Barcelona							
Specific norms and habits of local people concerning interpersonal relationship							
Language barrier because of my poor knowledge of Catalan							
Making new friends among the local people							
Level of English proficiency of the people working in public institutions (e.g., Ajuntament, police stations, hospitals, etc.)							
Level of English proficiency of the local people from Barcelona in general							

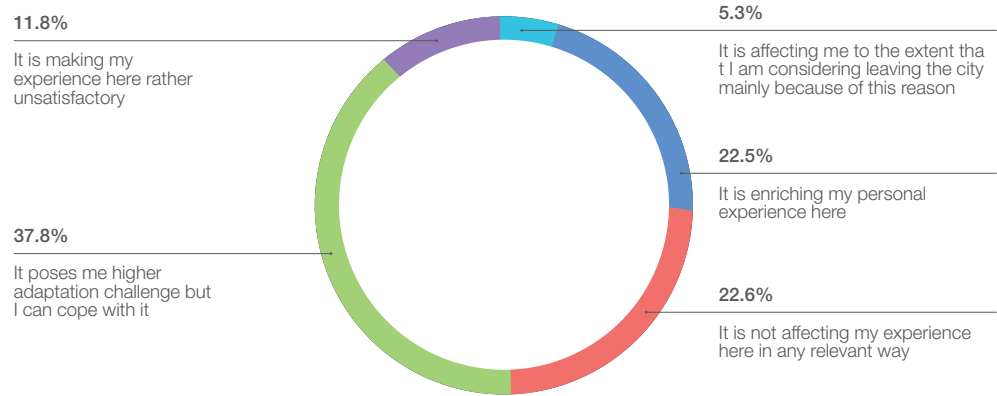
How helpful have the following social groups been to you in making acquaintances in Barcelona?



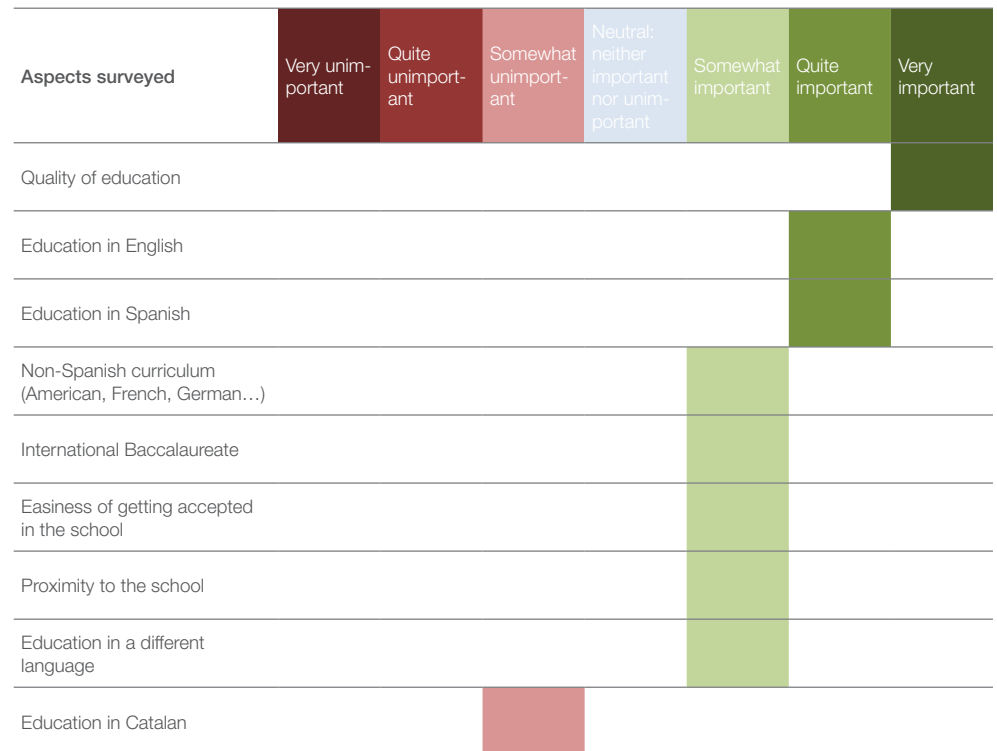
At the time you decided to come to Barcelona, to what extent did you know about the importance of Catalan language in each of following situations?



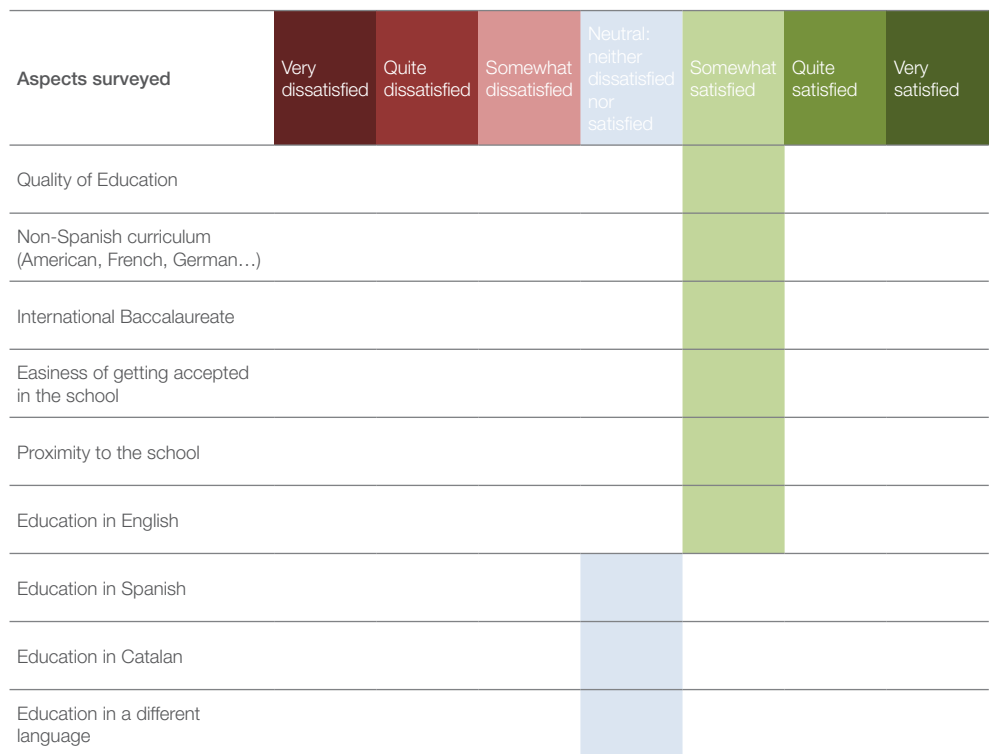
How is the importance of Catalan language in Barcelona affecting your experience here?



Indicate the importance of the following aspects in choosing a school for your children



Indicate the satisfaction with the current educational offer available in Barcelona



Indicate your level of satisfaction with each of the following aspects of housing in Barcelona



Indicate your level of satisfaction with each of the following aspects concerning living in Barcelona

Aspects surveyed	Very dissatisfied	Quite dissatisfied	Somewhat dissatisfied	Neutral: neither dissatisfied nor satisfied	Somewhat satisfied	Quite satisfied	Very satisfied
Cultural attractions (e.g. quality and number of museums, conferences, exhibitions)							
Private healthcare system							
Barcelona's weather							
Quality and quantity of public spaces/services per neighborhood (library, civic centers, sport, religious facilities)							
Urban planning of public spaces (street amenities, parks)							
Availability of natural spaces							
Urban sports facilities (e.g., running tracks, sports courts)							
Art performances (theatre, classical and popular music)							
Presence of an international community							
Cost/quality balance of living in Barcelona							
Safety (lack of crime)							
Tolerance of people in Barcelona towards diverse personal lifestyles							
Public healthcare system							
Healthy environment (i.e. pollution)							
Socio-political climate in Barcelona							

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