

Barcelona Global

Life Sciences Chapter[®]



Barcelona
Europe's Life Sciences
and Innovation Capital

The **Life Sciences Chapter** positions Barcelona as a leading European hub for innovation, talent, and excellence in the life sciences sector. This initiative, led by Barcelona Global, was launched to address key challenges and enhance the city's global competitiveness. With a strong foundation of 1,400 companies, 91 research entities, and a workforce of 264,000 professionals, Barcelona generates €42.068 billion annually from the sector. Catalonia's ecosystem integrates renowned hospitals, prestigious universities, and dynamic public-private collaborations, making it a cornerstone for life sciences innovation.

The Chapter's primary goal is to strengthen Barcelona's role in life sciences through collaboration, structured processes, and actionable outcomes. Over 125 stakeholders have contributed to five focus groups (Financing, Integrated Ecosystem, International Branding, Infrastructure, and Talent) that tackle key challenges and identify strategic opportunities. Oversight by the Chapter's Executive Committee ensures alignment and coordination of efforts.

Key achievements include the proposal of an Early-Stage Fund (€50-100 million) supported by public and private capital to address funding gaps for startups. Partnerships with institutions like Biocat and the European Investment Bank have been encouraged

to bolster the ecosystem. In the infrastructure focus group, the Chapter recommended creating an infrastructure map to optimise resources and attract global investment, while identifying areas for urban development to establish medical, biotech, and clinical hubs. The Integrated Ecosystem group proposed a centralised data platform to integrate and standardise health data, alongside regulatory reforms to simplify data sharing while ensuring privacy and security.

The Chapter also developed a marketing toolkit to enhance Barcelona's international branding, leveraging Key Opinion Leaders (KOLs) to promote the city's strengths globally. On talent development, programmes for executives and early-career professionals were designed to bridge skill gaps, align with industry needs, and attract global talent while fostering local expertise.

By addressing challenges in funding, infrastructure, data integration, branding, and talent retention, the Life Sciences Chapter provides a roadmap for sustainable growth. Its collaborative approach and strategic focus aim to solidify Barcelona's position as a global benchmark in the life sciences sector, fostering innovation, economic development, and improved healthcare outcomes.

Introduction

This Chapter was created out of the need to address Barcelona's major challenges in a structured and collaborative way, ensuring that the city maintains its competitiveness against other global capitals. Its goal is to strengthen and improve key sectors, such as life sciences, with a long-term vision to guarantee that Barcelona remains a global benchmark in innovation, talent, and quality of life. Consequently, it aims to ensure the city remains one of the best places in the world to live and work.

This Chapter aims to position **Barcelona as a leading reference in Europe** for the life sciences sector. Over the past year, we have brought together around 125 of the most relevant individuals from the ecosystem and created 5 working groups:

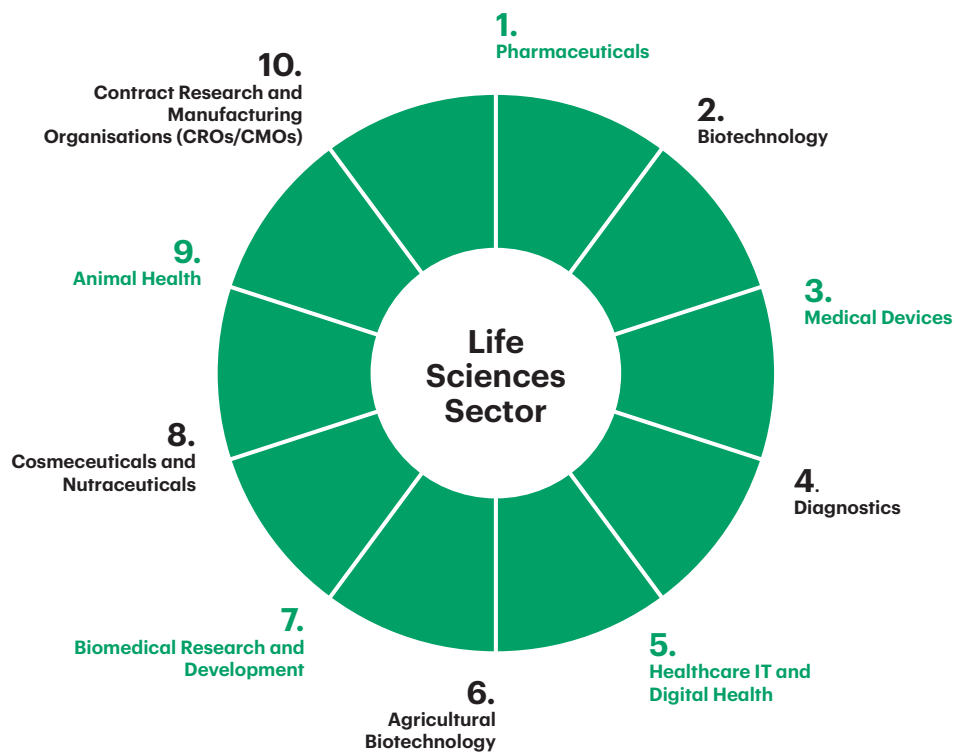
- **Financing**
- **Integrated Ecosystem**
- **International Branding**
- **Infrastructures**
- **Talent**

All these groups have been working towards the goal of making Barcelona a world-class hub.

Why the Life Sciences sector?

The life sciences sector represents a critical engine for innovation, research, and technological advancement, serving as a cornerstone for addressing both present and future global health challenges. Its contributions extend beyond healthcare, driving economic growth, generating employment, and fostering breakthroughs in technology at an unparalleled pace. This sector is uniquely positioned to advance human health and reshape the trajectory of scientific discovery through transformative solutions and methodologies.

Comprising a multifaceted ecosystem, the life sciences sector includes industries such as pharmaceuticals, biotechnology, medical devices, cosmeceuticals, digital health and nutrition, among others. As of 2023, the aggregated market valuation of the pharmaceutical, biotechnology, and medtech subsectors alone reached an extraordinary \$2.83 trillion USD, underscoring the vast scale and strategic importance of this field. Barcelona stands at the forefront of this global landscape, leveraging its highly skilled workforce, internationally recognized research institutions, prestigious universities, and robust infrastructure to fortify its position as a pivotal hub for life sciences innovation and development.



1. Pharmaceuticals

- Development, production, and marketing of medications for human and veterinary use.
- Includes small-molecule drugs and biologics (e.g., vaccines, gene therapies).

2. Biotechnology

- Application of biological systems and organisms for industrial, agricultural, and medical advancements.
- Examples: Genetic engineering, CRISPR, bioinformatics, and synthetic biology.

3. Medical Devices

- Design and production of tools for diagnostics, treatment, and monitoring.
- Includes surgical instruments, prosthetics, imaging equipment, and wearable health tech.

4. Diagnostics

- Technologies for detecting diseases or medical conditions.
- Examples: Blood tests, molecular diagnostics, and imaging technologies.

5. Healthcare IT and Digital Health

- Integration of technology in healthcare delivery.
- Examples: Telemedicine, electronic health records (EHR), and AI-driven diagnostics.

6. Agricultural Biotechnology

- Innovations to improve crop yield, pest resistance, and sustainable farming.
- Examples: Genetically modified organisms (GMOs) and biofertilizers.

7. Biomedical Research and Development

- Studies aimed at understanding diseases, developing therapies, and advancing knowledge of biological systems.
- Conducted in universities, research institutions, and private laboratories.

8. Cosmeceuticals and Nutraceuticals

- Products at the intersection of cosmetics, pharmaceuticals (cosmeceuticals), nutrition, and medicine (nutraceuticals).
- Examples: Anti-aging creams and fortified foods.

9. Animal Health

- Veterinary pharmaceuticals, diagnostics, and devices aimed at improving animal welfare and productivity.

10. Contract Research and Manufacturing Organisations (CROs/CMOs)

- Companies providing outsourced research, development, and manufacturing services to the biotech and pharmaceutical sectors.



Ramon Agenjo
President, Barcelona Global

“The Life Sciences Chapter has highlighted that Barcelona possesses all the conditions to play a prominent role in the international life sciences industry: highly skilled talent, world-class infrastructure, renowned hospitals, a dynamic business ecosystem, excellent biomedical research, and ongoing public-private projects. These strengths are further complemented by an exceptional quality of life, which continues to attract top talent from around the world.”



Maite Barrera
Barcelona Global’s Honorary President

“The great value is the talent we have, it is generous talent, it is impact talent, from all sectors, talent from large companies, small companies, from the public sector, the private sector, researchers, academics, creatives. The Life Sciences Chapter allows us to position Barcelona in the face of economic and social challenges and does not have an end goal, but a continuous objective, the idea is that people from different perspectives but from the same sector can come together, can share their opinions, can analyse challenges, can look for solutions and execute them but in a continuous way”

Barcelona's Life Sciences Ecosystem

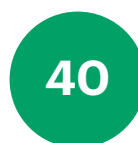


The **life sciences sector in Catalonia** serves as a pivotal driver of innovation, economic progress, and social development, playing a transformative role in the region's growth trajectory.

As of 2024, Catalonia has a population of 8,016,606, with 5,712,000 residents concentrated in the Barcelona Metropolitan Area. Notably, 23.6% of Barcelona's population comprises foreign nationals, the highest proportion recorded to date, reflecting its global appeal. Economically, Catalonia contributed **€292 billion in GDP in 2023**, accounting for **20% of Spain's total GDP**. Additionally, the region hosts over **140 global corporate hubs**, underscoring its strategic importance on the international stage.

Barcelona is home to **eight universities** with nearly **250,000 students**, complemented by world-renowned business schools such as **IESE and ESADE**, both ranked among the **global top**. These institutions, combined with Barcelona's reputation as one of the world's premier cities for remote work due to its exceptional quality of life, foster a highly skilled talent pool. The region is supported by over 122,190 digital professionals, 33% of whom are international, reflecting its cosmopolitan and innovative workforce.

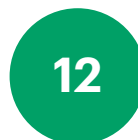
Barcelona has established itself as one of Europe's most promising health research and innovation hubs, concentrating **94% of Catalonia's life sciences activity**. Across the region, more than **1,400 companies and 91 research institutions** form a dynamic ecosystem, bolstered by Barcelona's strategic investments in infrastructure, education, and innovation. These factors collectively position the city as a global leader in the life sciences sector.



Research centres
(32 of which are CERCA)



University hospitals



Universities offering Life Sciences studies



Large scientific infrastructures
(the ALBA synchrotron, the Barcelona Supercomputing Centre, and the National Centre for Analysis and Genomics)



Technology centres



Science and technology parks with businesses involved in Life Sciences

The Catalan healthcare and Life Sciences sector comprises more than **1,400 companies** of which **550 are startups and scaleups**



Source: "2023 BioRegion Report" conducted by Biocat. "Barcelona, a thriving Life Sciences hub" Report 2024 conducted by Barcelona & Partners and CBRE

Barcelona's dynamic and highly interconnected ecosystem is anchored by globally renowned hospitals and research centres such as **Hospital Clínic**, **Vall d'Hebron University Hospital**, and the **Institute for Research in Biomedicine (IRB)**. These institutions spearhead groundbreaking scientific discoveries, solidifying the region's position as a leading hub for clinical research. Barcelona ranks **5th in Europe** and **8th globally** in the number of clinical trials conducted, underscoring its pivotal role in advancing global healthcare innovation. (*)

Catalonia boasts a robust educational foundation, with over 200 academic degrees and more than 52,000 students specialising in life sciences. This strong academic base has propelled Barcelona to become a powerhouse of scientific output. As of 2022, Catalonia ranked **3rd in Europe** (per million inhabitants) for the number of Highly Cited Papers (HCPs) and the percentage of HCPs cited in patents (35%). The region also ranked **5th in the EU** and **20th globally** for research production, highlighting its global significance in advancing scientific knowledge.

The life sciences sector serves as a cornerstone of Catalonia's economy, employing nearly **264,000 professionals**, which constitutes **7.9% of the regional workforce**, and generating a turnover of **€42,068 million** in 2023. This thriving sector underpins the region's innovation and economic development.

Barcelona's life sciences ecosystem is rapidly expanding, with transformative projects shaping its future. The **Health BioCluster** is poised to create significant employment opportunities, while the **Caixa Research Institute** will focus on immunology and host up to 700 professionals. Additionally, the extension of **Hospital Clínic** within Barcelona's Science Park—featuring a **290,000 sqm facility** and over **3,000 employees** dedicated to the health sector—will solidify Barcelona's role as Spain's premier life sciences hub. The **Unicas network**, led by **Sant Joan de Déu Children's Hospital**, is set to significantly impact the health of thousands of people, addressing nearly **400,000 cases of rare diseases** in individuals under 18 years of age in Spain. The initiative aims to improve the **prognosis, treatment access, and quality of life** for affected patients.

Additionally, the **Ciudadella del Coneixement Project**, spearheaded by **BIST (Barcelona Institute of Science and Technology)**, seeks to establish a pioneering research centre shared by several institutes. This innovative collaboration fosters interdisciplinary knowledge exchange and drives groundbreaking advancements.

Hubs in Barcelona

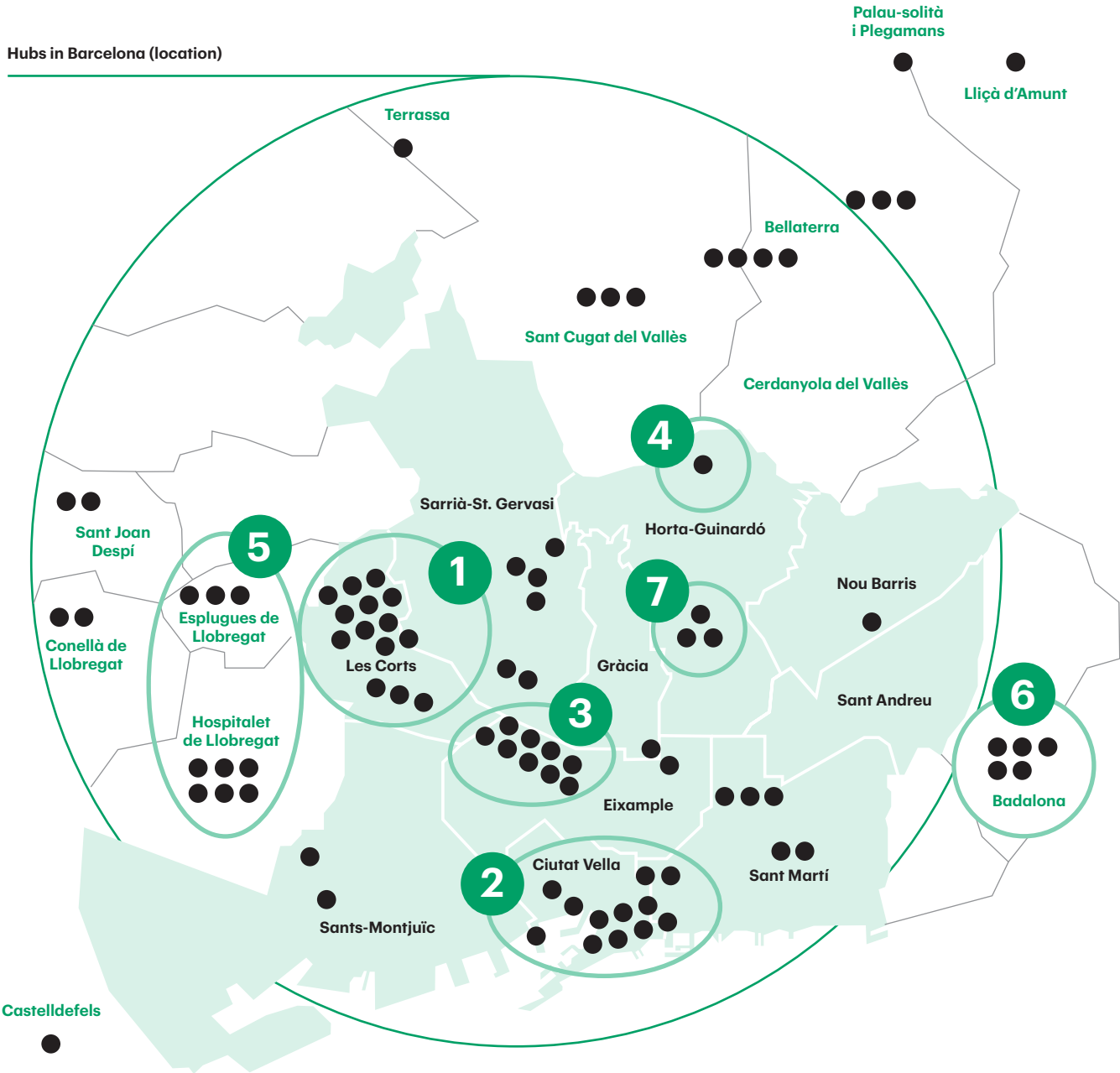
The Barcelona metropolitan area has everything needed for Life Sciences hubs.

1. **Science Park Area – Hospital Clínic extension (New location)**
 - Hospital Clínic (pending relocation)
 - Parc Científic de Barcelona (PCB)
 - Parc de Recerca i Innovació de la UPC (Parc UPC)
 - Institut de Recerca en Biomedicina (IRB)
 - Institut de Bioenginyeria de Catalunya (IBEC)
 - Hospital de Barcelona
 - Clínica Corachan
 - Universitat Politècnica de Catalunya (UPC)
 - Universidad de Barcelona (UB)
 - Barcelona Supercomputing Centre (BSC)
 - Biocat
 - Catalonia Bio & Health tech
 - Caixa Capital Risc (investor)
 - Inbeyond (investor)
 - Ferrer (company)
2. **Ciudadella Knowledge Hub (Current location)**
 - Hospital del Mar
 - Parc de Recerca Biomèdica de Barcelona (PRBB)
 - Instituto de investigaciones médicas Hospital del Mar (IMIM)
 - Centre de Regulació Genòmica (CRG)
 - Instituto de Salud Global de Barcelona (ISG)
 - Instituto de Biología Evolutiva (IBE)
 - Barcelona Laboratorio Europea de Biología Molecular EMBL
 - IRAB Instituto de Radiofarmacia aplicada de Barcelona
 - Fundació Pascual Maragall
 - Mercat del Peix (in construction)
 - Universitat Pompeu Fabra (UPF)
 - Amgen (company)
 - Barcelona Tech City – Pier 07
 - Asabys (Investors)
3. **Cluster Hospital Clínic (Current location)**
 - Hospital Clínic
 - Instituto de Investigaciones Biomédicas August Pi i Sunyer (IDIBAPS)
 - Alta Life Sciences (Investors)
 - Invivo Ventures (Investors)
 - Universidad de Barcelona (UB)
4. **Vall d'Hebron**
 - Vall d'Hebron Campus Hospitalari de Barcelona
 - Instituto de investigación Vall d'Hebron –VHIR
 - Vall d'Hebron Instituto de Oncología (VHIO)
5. **Innovation and Health BioCluster**
 - Hospital Infantil SJD de Barcelona (SJD)
 - Hospital Universitari de Bellvitge
 - Institut Català d'Oncologia (ICO)
 - Institut de Recerca Biomèdica de Bellvitge (IDIBELL)
 - Universidad de Barcelona (UB)
 - Centre d'Innovació en Ciències de la Salut de Nestlé
 - Deepblabs
6. **Can Ruti**
 - Hospital Universitari Germans Trias i Pujol
 - Instituto de Investigación Germans Trias i Pujol (IGTP)
 - Institut Guttmann
 - Institut de Recerca de la Sida (IRSI Caixa)
 - Institut de Recerca contra la Leucèmia Josep Carreras
 - Invivo Ventures (investor)
 - Universidad de Barcelona (UB)
7. **Hospital de la Santa Creu i Sant Pau**
 - Investigación Biomédica – Sant Pau (IB)
 - Institut de Recerca – Sant Pau (IR Sant Pau)
 - Barcelona Health Hub
 - Nina Capital (investor)

In 2024, the **European Commission** entrusted two major projects to Catalonia's leading research institutions. The **ICFO (Institute of Photonic Sciences)** was selected to lead and coordinate the **PIX Europe Project**, which aimed to advance Europe's capabilities in photonic chips and cement its position as a global leader in the field. Simultaneously, the **Barcelona Supercomputing Center** was tasked with developing one of Europe's **seven AI factories**, a critical initiative to propel Europe to the forefront of artificial intelligence research and application.

The presence of major industry leaders with both operational, commercial and research and development sites such as **Almirall, AstraZeneca, Bayer, Boehringer Ingelheim, Dr. Reddy's, Esteve, Ferrer, Roche, Sanofi, Novartis, Uriach, Werfen, among other relevant**s, and alongside a dynamic startup ecosystem, positions Barcelona as a global hub for life sciences and innovation.

Hubs in Barcelona (location)



Source: "2023 BioRegion Report" conducted by Biocat. "Barcelona, a thriving Life Sciences hub" Report 2024 conducted by Barcelona & Partners and CBRE

Why Barcelona?

The city boasts a robust, mature, and highly consolidated ecosystem, which has positioned it as a powerhouse for research, development, and innovation. Barcelona, has all the necessary ingredients to establish itself as a global leader in the life sciences sector. However, its ability to maintain its competitive edge is challenged by the sector's rapid growth, infrastructural demands, funding shortages, and increasing competition from other cities and regions.

This issue is not confined to Barcelona but extends across Europe. The **2024 report “The Future of European Competitiveness” by Mario Draghi** highlights that Europe is lagging behind major global competitors in economic growth and innovation. While Europe invests only 2.24% of its GDP in R&D, just five countries surpass the 3% mark. Comparatively, the US invests 3.5%, Japan 3.3%, and China 2.4%. Addressing this gap requires increased funding for high-risk, high-reward projects, particularly in areas with significant unmet medical needs. Dedicated funding mechanisms for small and medium biotech enterprises (SMEs) are essential to transform academic research into market-ready solutions. Bridging the divide between research and commercialisation also necessitates incubators and accelerators that provide mentorship, funding, and industry access. Simplified intellectual property (IP) policies will further encourage collaboration between universities and industry partners.

Additional efforts should focus on training healthcare professionals to adopt AI tools, such as decision-support systems and robotic surgery, to enhance treat-

ment outcomes. University curricula must integrate interdisciplinary skills, merging life sciences with AI, data analytics, and machine learning. Addressing the sector's brain drain, with top researchers relocating to countries offering better funding and career opportunities, is also critical. Policies like visa facilitation, tax incentives, and establishing innovation districts can attract and retain global talent, while public-private collaborations can fund training programmes and fellowships.

Centralised health data platforms are another critical need, as unified health data repositories can accelerate the development of personalised medicine by enabling precise treatment protocols. Europe must balance these advancements with strong data security and privacy compliance (e.g., GDPR) while fostering cross-border collaboration for improved healthcare outcomes.

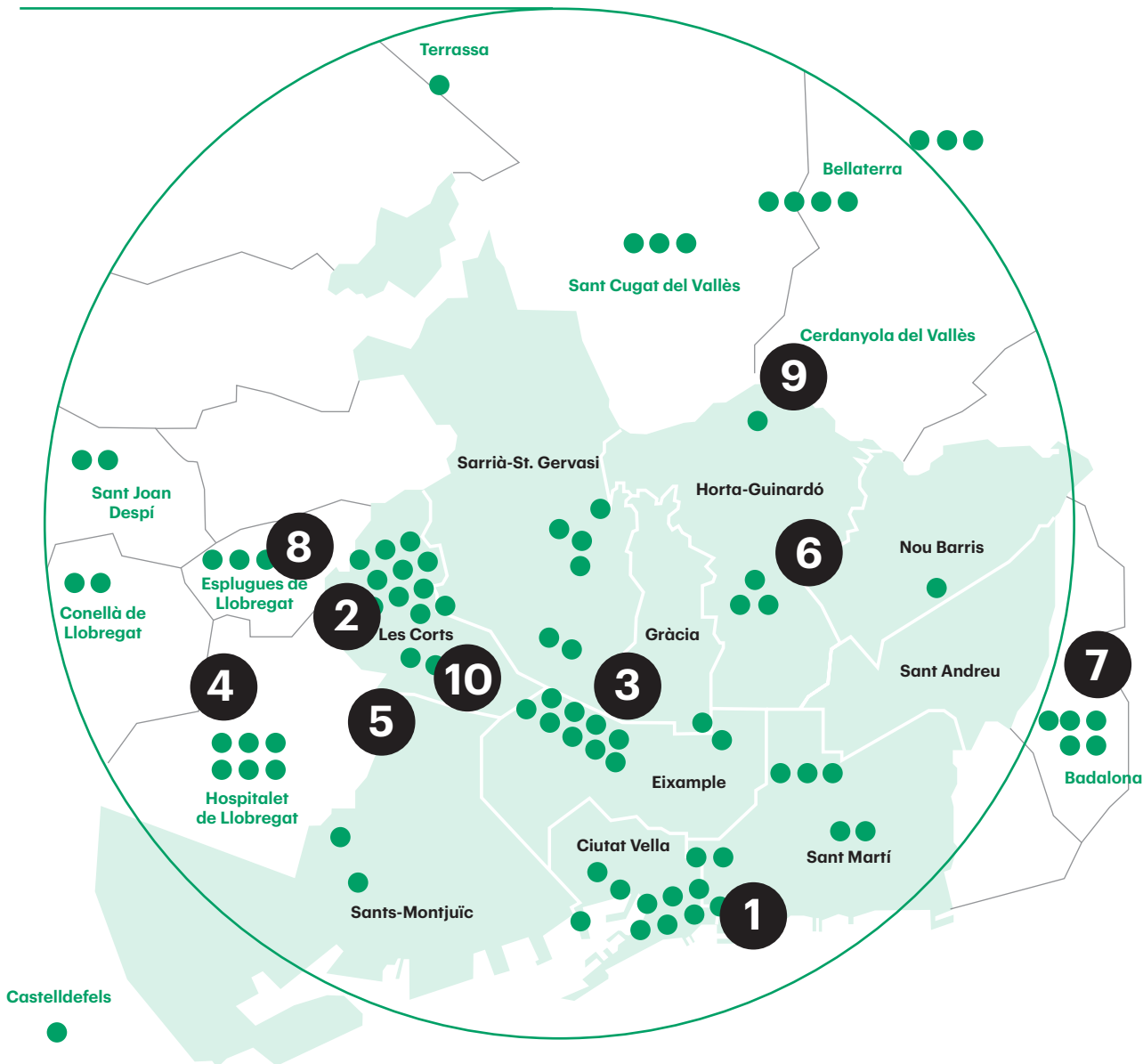
Despite these challenges, Barcelona is uniquely positioned to seize significant opportunities. With the right strategic focus, it can lead the life sciences sector in Europe. Collaborative efforts by **Barcelona Global** and its investment agency, **Barcelona & Partners**, have brought together key stakeholders, including pharmaceutical companies, scale-ups, universities, and consultancy firms. Working across five strategic areas—Financing, Infrastructure, Integrated Ecosystem, International Branding, and Talent Development—Barcelona aims to fortify its life sciences ecosystem, drive innovation, and secure its place as a global leader in the sector.



Mercè Conesa
CEO, Barcelona Global

“Life sciences is a strategic sector for the city of Barcelona, which boasts over 90 cutting-edge research centres and leading hospitals. For this reason, Barcelona Global launched this chapter with the goal of positioning the city as the life sciences capital of Europe.”

Scientific Capacity (location)



Scientific Capacity

Barcelona is home to leading science facilities, giving the city the potential to play a key role in advancing health sciences and the production of new medicines.

- 1. **CRG:** International biomedical research institute of excellence focused on genomics.
- 2. **IBEC:** Multidisciplinary research institution specializing in bioengineering and nanomedicine. Recently partnered with Fraunhofer
- 3. **IDIBAPS:** A leading biomedical center dedicated, first to the ongoing pursuit of knowledge regarding diseases, their treatment clinical application, and dissemination.
- 4. **IDIBELL:** It is a research center in biomedicine focused on cancer, neuroscience, translational medicine and regenerative medicine.
- 5. **IRB:** Biomedical research center with the mission to carry out research of excellence to cure cancer and other diseases linked to ageing.

- 6. **IR Sant Pau:** Committed to advancing research in basic, clinical, epidemiological, and healthcare services within health sciences and biomedicine.
- 7. **IRSD:** A European reference in comprehensive biomedical research into the health of individuals in the pediatric age.
- 8. **IRSI Caixa.** An international leader in HIV/AIDS research and a reference in the study of emerging infectious diseases, the microbiome, and cancer.
- 9. **VHIR & VHIO:** VHIR conducts cutting-edge research in oncology, neurosciences, infectious diseases among others. VHIO is a reference center for personalized medicine in oncology.
- 10. **CNAG:** Focuses on executing genome analysis programs, utilizing advanced sequencing technologies and bioinformatics to support research in genomics.

Life Sciences

Chapter's Operation

The Chapter is spearheaded by a **its Executive Committee** and actively supported by Barcelona Global's Projects team. **The Chapter's President is Josep Lluís Sanfeliu**, Managing Partner and Founder of Asabys, as well as Vice-President of Barcelona Global.

Five focus groups have been established to address key challenges within the life sciences sector: **Financing, Infrastructure, Integrated Ecosystem, International Branding**, and **Talent**. These focus groups aim to comprehensively analyse the sector's needs and develop actionable proposals for the short, medium, and long term.

Each focus group is co-led by two leaders and supported by other key members to guide discussions and ensure concrete and practical outcomes. Deliverables and schedules are defined for each group, and they have the flexibility to invite special guests or incorporate additional members to tackle specific issues. The composition of the groups includes representatives from administrations, corporations, start-ups, investors, and service providers, ensuring diverse perspectives and expertise.

The focus groups involved more than **115 active participants**, with group sizes ranging from **15 to 30 members**, reflecting broad engagement and collaboration.

This structure ensures that the Chapter operates efficiently, drawing on the collective insights and resources of a diverse array of stakeholders to advance Barcelona's life sciences ecosystem.

The Chapter's Executive Committee is represented by:



Josep Lluís Sanfeliu
President of the Chapter
& Co-leader of Financing group
Managing Partner and Founder, ASABYS



Andreu Mas-Colell
Chapter's Executive Committee
Professor of Economics,
Universitat Pompeu Fabra



Montserrat Puig Ponsico
Chapter's Executive Committee
CEO, Barcelona & Partners



Josep Taberneró
Chapter's Executive Committee
Head of the Medical Oncology Service at Vall
d'Hebron University Hospital, Director of the
Vall d'Hebron Institute of Oncology.



James Sharpe
Chapter's Executive Committee
Head of European Molecular Biology
Laboratory



Louise Warme
Chapter's Executive Committee
Head of We Venture Capital



Javier Selva
Co-leader Financing group
Former CEO, CataloniaBio & HealthTech



Eduard Vallory
Co-leader Infrastructure group
Director General, Barcelona Institute
of Science and Technology



Mercè Conesa
Co-leader Infrastructure group
CEO, Barcelona Global



Ignasi Biosca-Reig
Co-leader Integrated Ecosystem group
CEO, Reig Jofre



Núria Mas
Co-leader Integrated Ecosystem group
Professor of Economics, IESE



Laura Soucek
Co-leader International Branding group
CEO, Peptomyc



Christopher Coe
Co-leader International Branding group
Senior Partner, Kingsley Gate



Carlos Nueno
Co-leader Talent group
International President, Teladoc Health



Gonzalo de Miquel
Co-leader Talent group
VP, Global Clinical Development,
Alexion, AstraZeneca rare disease

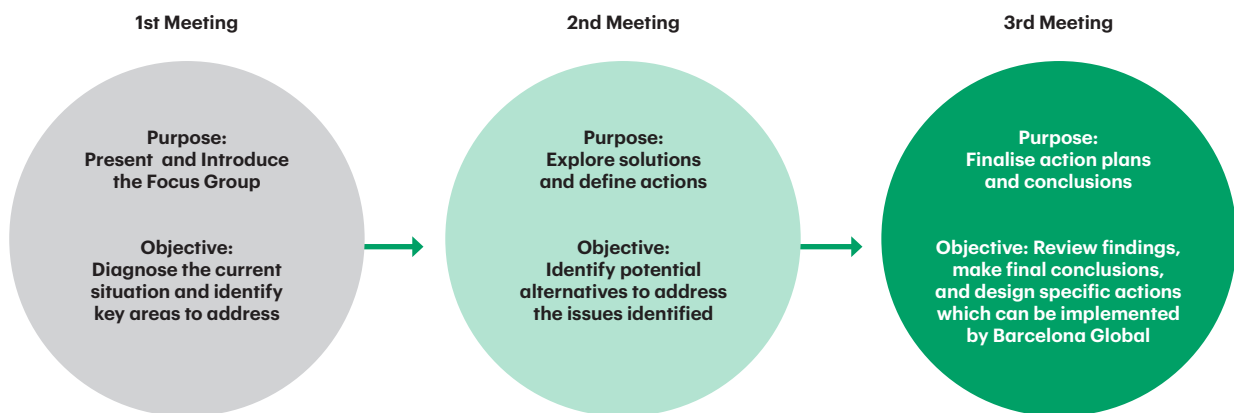
Working methodology

The Life Sciences Chapter was officially launched with a **kick-off meeting in December 2023**, during which its members were introduced to the Chapter's objectives, operations, and focus groups. The Core Team outlined the topics to be addressed in upcoming meetings and explained the Chapter's procedures. The primary goal of this session was to familiarise participants with the Chapter's structure, clarify its objectives, and provide a platform for members to ask questions and engage with their co-leaders.

The **Chapter's Executive Committee** convened at key milestones, including before the first plenary session, before each round of focus group meetings, and twice before the final plenary session. These gatherings enabled members to share insights from their respective focus groups, exchange best practices, and align the overall direction of the Chapter. By leveraging their collective expertise, COMEX members enhanced the coordination and effectiveness of the initiative.

Each focus group met **three times**, and Barcelona Global supported them in organising meetings, preparing materials, recording minutes, and managing logistics. These sessions followed a **clear and structured approach**, ensuring a seamless process for generating actionable ideas and solutions while fostering meaningful collaboration across all stakeholders.

A **plenary session is scheduled for January 2025** to bring together all Chapter members. This session will serve as a platform to present the outcomes of each focus group, showcasing their findings and emphasising the actionable proposals developed throughout the Chapter's activities. This event aims to consolidate efforts, foster collaboration, and set the stage for implementing the proposed initiatives.



Focus Groups

Financing

The **Financing Focus Group**, co-led by **Josep Sanfeliu** and **Javier Selva**, tackled the critical funding gaps in Barcelona's life sciences ecosystem. The group focused on enabling emerging companies and initiatives to transition promising scientific discoveries into investable ventures by improving access to early-stage funding. Through its meetings, the group analysed barriers to financing and proposed strategies to mobilise both public and private capital, aiming to strengthen the ecosystem's financial foundation.

The group's detailed analysis identified several key challenges. A major issue was the lack of funding for early-stage life sciences projects, which often impedes the launch and growth of innovation-driven companies. Public funding mechanisms were found to be rigid and generic, applying evaluation criteria unsuited to the sector's inherent risks and long development cycles. Additionally, private funding was insufficient due to the relatively small scale and resource limitations of local pharmaceutical and med-tech industries, compounded by their generally risk-averse nature rooted in familial business structures. This created a significant funding gap, particularly for high-risk "killer experiment" projects requiring bold early-stage investment.

Early-Stage Funding

To address these issues, the focus group proposed actionable solutions. Central to their recommendations was establishing an **Early-Stage Fund** targeting a capital pool of **€50 to €100 million**, jointly supported by public and private investors. Public sector contributions would focus on absorbing higher-risk investments, serving as a catalyst to attract private participation. Additionally, the group recommended leveraging **government-backed guarantees** and **European Investment Bank loans** to reduce investor risk and incentivise private capital involvement. The focus group is also highlighting the need for the

local life sciences industry to consider joining this effort due to the synergies and support that this initiative can provide to the ecosystem, just like in other geographies incumbents have fostered early stage external research via investment in early-stage funds or direct investment in the start-up ecosystem alongside with financial venture capital investors.

Support services

Collaborations with key institutions such as **Biocat**, **ACCIO**, **Ajuntament de Barcelona**, and the **Institut Català de Finances (ICF)** were emphasised to provide additional support services, including coaching and consultancy, to help projects scale effectively. Incentivising local industries to reinvest in the ecosystem and establishing standardised financial instruments with loan guarantees were also identified as critical measures to create a sustainable funding environment.

Public-private partnership

The **Barcelona City Council** has unveiled a new **public-private investment fund** to support **deep tech startups**—innovative ventures emerging from universities and research centres that harness advanced technology to tackle pressing societal challenges and shape the future.

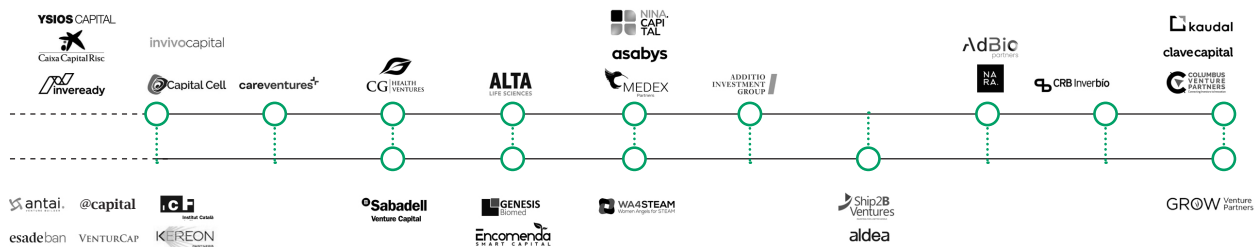
This fund would include an initial **municipal contribution of €10 million**, with the potential to scale up to **€30 million** through public and private investment. It complements the existing **Barcelona Accelera fund**, a financing initiative launched by the Barcelona City Council and **Barcelona Activa** to support startups. Barcelona Accelera began with €10 million in public funding, successfully leveraging private contributions to quintuple its impact, offering significant support to the city's entrepreneurial ecosystem.

By fostering innovation in high-impact, deep-tech sectors, this new fund underscores Barcelona’s strategic commitment to solidifying its role as a global hub for **cutting-edge technology, research, and entrepreneurship**.

The focus group concluded that a **public-private partnership model** is essential to bridge the funding gap in Barcelona’s life sciences sector. This model

would address immediate early-stage funding needs and create a self-sustaining cycle of reinvestment by successful projects, ensuring long-term growth and resilience in the ecosystem. This early-stage financing industry would allow unlocking deep tech life sciences companies, and sound scientific assets, which take too long to emerge from the R&D ecosystem into company creation.

Specialized investment funds



Other investors



Josep Lluís Sanfeliu
Managing Partner and Founder,
ASABYS

“The Chapter will undoubtedly contribute to improving a sector that faces the challenge of developing therapeutic, scientific, and health-care diagnostic solutions that not only enable a healthier society but also ensure a more economically sustainable healthcare system.”



Christian Brander
ICREA Professor at IrsiCaixa
and Co-founder Brisa Biomedical

“We need to invite in more foreign investors and ensure that they become aware of the Barcelona biotech hub, the opportunities, and the challenges that still exist in the area here in Barcelona.”

Infrastructure

The **Infrastructure Focus Group** within the Life Sciences Chapter addressed the infrastructure challenges hindering the growth of Barcelona's rapidly expanding life sciences ecosystem. Co-led by **Eduard Vallory** and **Mercè Conesa**, the group aimed to assess the sector's current needs and devise strategies to ensure that Barcelona's infrastructure supports its evolution into a global hub for research and innovation.

Reduce bureaucracy and administrative complexity

Key discussions highlighted several challenges. The sector's rapid expansion has put significant pressure on existing public resources, creating a mismatch between the demand for essential facilities, such as laboratories and office spaces, and their availability. Compounding this issue are **lengthy and complex administrative processes**, particularly regarding licensing, which have led to significant delays and, in some cases, project cancellations. The group em-

phasised the need for greater private sector involvement to supplement public investment, drawing on successful examples from other cities like Paris.

Comprehensive infrastructure map

Additionally, Barcelona's unique geographic constraints require careful urban planning to optimise the limited space available for development. While progress has been made with initiatives such as the **Ciutadella Knowledge Hub** and the **Cluster Hospital Clinic**, stakeholders underscored the need for a **comprehensive infrastructure map**. This map would categorise existing facilities by type, ownership, and functionality as a critical tool for businesses exploring relocation or expansion within the city. By providing transparency on future infrastructure plans and aligning these with business needs, the map would enhance planning and strengthen Barcelona's ability to attract international talent and investment.

Through these efforts, the focus group identified strategic actions to ensure Barcelona's infrastructure evolves with the sector's growth, reinforcing its position as a premier destination for life sciences innovation.



Eduard Vallory

Director General, Barcelona Institute of Science and Technology

"In this focus group, we have concluded we need to have a repository of updated information of all the life sciences infrastructures that are being developed in Barcelona, and that this could be done with the support of Barcelona Global in alliance with BIOCAT and/or other public administrations, and with the participation of all the members of the group, plus other institutions and key players".



Eva Jodar

Senior Director Client Care & Client Solutions, CBRE España

"Barcelona and its metropolitan area boast 900,000 square meters of land designated for life sciences and Healthcare projects in the short and long term, which is attracting significant interest from investors in this type of business. We have the opportunity to position ourselves as the health hub of Southern Europe."



Ramon Gras

City Science and Urban Design Researcher, Harvard University and CEO & Co-Founder, Aretian.

"The urban infrastructure and design sector can significantly contribute to strengthening the life sciences and overall healthcare ecosystem in the Barcelona Metropolitan Region through three key strategic interventions in different areas. First, the creation of an innovative medical ecosystem. Second, the establishment of a biotech hub, closely linked to the pharmaceutical industry. Third, a clinical trials and laboratory hub. These hubs should complement each other and bring together expertise in three key fields: medicine, pharmacy, and biotechnology."

Integrated Ecosystem

The **Integrated Ecosystem Focus Group**, co-led by **Ignasi Biosca-Reig** and **Núria Mas**, concentrated on strengthening the interconnections within Catalonia's life sciences ecosystem and outlining a roadmap to enhance its competitive advantages, particularly in leveraging data. The group emphasised the transformative potential of data to revolutionise patient care and accelerate innovation within the sector.

While the USA leads in leveraging data to create sophisticated AI systems, Europe—particularly Barcelona—has the potential to excel in developing applications that integrate AI. Europe's strength lies in its ability to significantly enhance healthcare through these applications.

Data integration

A central focus was improving patient care by enabling seamless access to comprehensive medical histories across Catalonia, Spain, and Europe hospitals. Such integration would improve healthcare outcomes and catalyse innovation by providing life sciences companies with robust datasets, significantly reducing the time and cost required to bring new drugs and medical products to market.



Núria Mas
Professor of Economics, IESE

“Healthcare is a strategic pillar for Europe, showcasing our expertise and innovation in improving lives. Our key advantage lies in leveraging health data to enhance the well-being of our citizens, turning this invaluable resource into better care and outcomes. By building applications of healthcare data on top of existing AI platforms, we have the opportunity to create immense value for society. However, to fully realise this potential, we must foster collaboration, ensuring that healthcare data is used responsibly and transparently to drive progress.”



Ignasi Biosca-Reig
CEO, Reig Jofre

“In Barcelona, and specifically at Hospital Sant Joan de Déu, we have a brilliant example of what data sharing entails: the UNICAS project. This highlights the importance of harmonizing data and demonstrates that creating and sharing a unified database is indeed possible.”



Montse Puig
CEO, Barcelona & Partners

“By integrating and standardising data, among different stakeholders, companies, startups and institutions, we can reduce product time to market and provide better patient care. We have focused on finding solutions to these challenges. When it comes to data, Barcelona is fortunate to have a very strong ecosystem for managing, processing, and securely storing that data.”

Despite Barcelona's advanced life sciences ecosystem, challenges remain in harnessing data's full potential. The ecosystem is hindered by fragmented data sources, a lack of standardised formats, and regulatory hurdles that complicate data sharing. Privacy concerns further restrict collaboration, limiting stakeholders' ability to maximize the value of existing data assets.

Data sharing protocols and regulatory reforms

The group made meaningful progress in addressing these barriers by identifying key areas for improvement. They proposed the development of a **centralised data platform** to aggregate and standardise data, the establishment of **data-sharing protocols**, and promoting **regulatory reforms** to simplify collaboration while ensuring data privacy and security. Additionally, the group recommended hosting an **annual event** to unite stakeholders, foster collaboration, and share best practices. To ensure the sustainability of these efforts, the group concluded that a **permanent task force** should be established to oversee the implementation of their recommendations and guide the continued evolution of an integrated life sciences ecosystem in Catalonia.

International Branding

The **International Branding Focus Group**, co-led by **Laura Soucek** and **Christopher Coe**, focused on enhancing global awareness and recognition of Barcelona's life sciences ecosystem. The group's mission was to contribute to position Barcelona as a leading international hub for life sciences by addressing branding challenges and leveraging the city's unique strengths.

Proposal/Action Plan

The Focus GroupG decided to Initiate feasible Short-Term Actions because:

- **Quick Interactions, Feedback, and Learnings:** Generate quick interactions to obtain immediate feedback and valuable learnings, helping us continuously improve.
- **Low Budget Requirements:** Execute actions with minimal financial investment, making them feasible and cost-effective.
- **Rapid Planning and Execution:** Plan and execute quickly to see results in a shorter timeframe.

These initial steps will provide a strong foundation for future efforts.



Artur Palet

Commercial Innovation Lead EMEA & LATAM, Roche Diagnostics

“Having a space for structured and anonymised data that enables its secondary use in research would provide significant value in the process and management of diseases and patients, including diagnosis, stratification, and follow-up. Economically, it could also serve as a key driver for the development of new products.”



Laura Soucek

CEO, Peptomyc

“Barcelona is already a global benchmark in certain areas of life sciences. We already have key opinion leaders, and what we want to do is leverage these key opinion leaders as ambassadors of the Barcelona brand worldwide.”



Christopher Coe

Senior Partner, Kingsley Gate

“I believe that the impact of the concerted efforts of the Barcelona Global chapters will be a significant benefit in supporting the region's growth as a dynamic hub for the life science sector. Implementing the messaging from the branding chapter we have created for the life science ecosystem through the use of the tools crafted by the work of the team are going to be incredibly valuable assets for the community.”

Actions:

- **Creating a Network of Industry Leaders:** Leverage the city's top professionals, physicians, investors, and international key opinion leaders as ambassadors. Equip them with concise materials (e.g., a one-page document or slide) to enhance their ability to represent and promote the ecosystem effectively. The team generated a list of industry leaders categorised by value chain and therapeutic areas to identify and engage the most influential individuals.
- **Marketing Toolbox:** To consolidate and share information among the FG, all chapter members, and industry leaders.
 - a. Industry Leaders Materials:** Develop materials with a simple, impactful, and inclusive message that describes the power of the LS ecosystem. Barcelona & Partners, based on information from Biocat and specialised sources, created a short presentation that can be adapted to different audiences and sectors.
 - b. Enhanced Presentations:** Gather existing publications, such as the Biocat annual report, real estate data, and comparative studies with other cities to provide extended information to chapter members.
 - c. Marketing Toolbox:** Create a marketing toolbox accessible through the Barcelona & Partners website to share all relevant information.

Talent

The **Talent Focus Group**, co-led by **Gonzalo de Miguel** and **Carlos Nueno**, focused on tackling the critical challenges of attracting, developing, and retaining talent in Barcelona's life sciences ecosystem. The group sought to understand the dynamics of the sector's workforce and devise strategies to strengthen the talent pipeline, emphasising fostering local expertise, attracting international professionals, and positioning Barcelona as a global hub for life sciences talent.

Removing barriers to attracting talent

While Barcelona boasts a thriving ecosystem supported by world-class institutions, research centres, and entrepreneurial ventures, it faces significant talent attraction and retention barriers. For international professionals, the city's appealing lifestyle and advanced ecosystem are often offset by structural challenges such as a lack of affordable housing, limited access to international schools, and insufficient relocation support. Companies also struggle to recruit skilled professionals in high-demand areas such as **data science** and **bioinformatics**, leading to reliance on costly foreign hires. Additionally, a disconnect between academia and industry exacerbates the issue, as university programmes often fail to align with market needs, leaving critical skills gaps unaddressed. This, coupled with limited visibility of the sector's success stories, reduces its appeal to young professionals entering the field.

Leadership and professional programmes

To address these challenges, the focus group proposed two key initiatives:

1. Executive Programme for Life Sciences Leaders:

- This programme, designed to attract global leaders to Barcelona, would be developed in collaboration with local business schools.
- The curriculum would focus on cutting-edge technologies and highlight Barcelona's flagship assets, including science parks, reference hospitals, and leading research centres.
- Delivered through case studies and on-site visits, the programme would showcase Barcelona's ecosystem, enhance global recognition, and attract decision-makers capable of driving future investments.

2. Programmes for Early-Career Professionals:

- This initiative aims to address expertise gaps in biomedical, digital health, and data sciences. It targets students and early-career professionals, offering entry points to the biopharma and Med-Tech industries.
- The programme is proposed at the intersection of biomedical sciences and digital and could be integrated into other established programmes as a dual degree. It would offer tailored, practical training aligned with industry needs with the active involvement of the local ecosystem, thus ensuring that vested companies and institutions provide targeted courses and internship opportunities. Other specific programmes can be identified and developed to address specific industry needs.
- The programmes aim at strengthening the local talent pool and reducing dependence on international hires by equipping participants with relevant skills through short-term, hands-on training.

These initiatives underscore the importance of aligning talent development with industry needs leveraging Barcelona's unique assets through public/private partnerships. By addressing structural challenges and showcasing the city's potential, these programmes could solidify Barcelona's position as a leading life sciences hub and ensure sustainable growth in talent attraction and retention.



Gonzalo de Miquel

VP, Global Clinical Development,
Alexion, AstraZeneca rare disease

“Barcelona has become a Life Sciences Hub at the European level, attracting many Biomedical, Med-Tech and Digital-Health companies to establish themselves here. This has created a significant demand for talent that we must address. One of our initiatives is to develop specific training programmes supported by the local industry and academia that combine biomedical sciences, innovative technologies, and digital health to supply the current and future talent demand. ”



Carlos Nueno

International President,
Teladoc Health

“To address the gap between the academic and corporate worlds, as well as the challenge of attracting and retaining high-quality talent, we identified a practical solution: developing training programmes in Barcelona. On one hand, these programmes are tailored for senior executives in the life sciences sector, aiming to showcase Barcelona’s assets while fostering relationships and maintaining valuable connections.”



Andreu Mas-Colell

Professor of Economics,
Universitat Pompeu Fabra

“When we talk about talent, the critical concept is critical mass: talent attracts talent. Once you have a sufficiently large mass, the process of continually accumulating talent becomes easier. And more so in a large city, oriented towards research, innovation, industry, etc, than in a smaller one. We are in the accumulation process, just at the critical point.”



Lu s Serrano

Research Institute Director,
Centro Regulaci n Genomica (CRG)

“It will undoubtedly become a source of talent, as both microfluidics and 3D organ printing require interdisciplinarity and collaboration among doctors, biologists, and engineers to develop new solutions.”

Conclusions

The Life Sciences Chapter has demonstrated the potential of collaborative efforts in addressing critical challenges across the life sciences ecosystem in Barcelona. The focus groups have provided actionable insights and recommendations in the areas of **Financing, Infrastructure, Integrated Ecosystem, International Branding**, and **Talent**, creating a roadmap for sustainable growth and innovation in the sector.

Financing

- The lack of early-stage funding has been a significant bottleneck on enabling life sciences projects to scale. The proposed creation of an **Early-Stage Fund** (targeting €50-100 million) backed by public and private capital is a vital step including the life sciences industry as contributors to the solution. Partnerships with institutions such as **Partnerships with institutions such as Biocat, Ajuntament de Barcelona**, and **Institut Català de Finances (ICF)** will ensure resources and expertise are available to foster a self-sustaining funding environment.

Infrastructure

- Rapid growth in the sector has highlighted a mismatch between infrastructure demand and availability, particularly for laboratories and office spaces. The recommendation to create a **comprehensive infrastructure map** and streamline administrative processes will enable better planning, attract global talent, and ensure the ecosystem evolves with the sector's expansion.

Integrated Ecosystem

- Leveraging data as a strategic asset is critical for advancing innovation and patient care. The group's proposal for a **centralised data platform**, alongside regulatory reforms and an annual event to foster collaboration, is essential for creating a unified, data-driven life sciences ecosystem. Establishing a permanent task force will ensure sustained progress and integration.

International Branding

- Barcelona's life sciences ecosystem is globally competitive but requires a unified message and a clear **Unique Selling Proposition (USP)** to amplify its strengths. Developing a **flexible marketing toolkit**, alongside a network of Key Opinion Leaders and Industry Leaders, will empower stakeholders to promote Barcelona's capabilities internationally, strengthening its position as a global powerhouse in life sciences.

Talent

- Addressing the talent gap is critical for long-term ecosystem resilience. Initiatives such as the **Executive Programme for Life Sciences Leaders** and the **Programmes for Early-Career Professionals** will align talent development with industry needs, attracting global decision-makers while equipping local professionals with essential skills. These programmes will reduce reliance on international hires and ensure a robust, skilled workforce.

A Roadmap for the Future

The Life Sciences Chapter's recommendations highlight the importance of collaboration between public and private stakeholders to tackle structural challenges and unlock Barcelona's full potential. The city is well-positioned to cement its status as a global hub for life sciences innovation by leveraging its strong academic, research, and entrepreneurial foundations. Barcelona Global is now ready to take the recommendations forward to the right audiences to implement not only the specific mandates that the Chapter has adopted but is also aware and ready to know to propose and influence policies and institutions addressing most of the topics which have been part of the working group sessions.

Implementing these strategies will not only address immediate ecosystem needs but also lay the groundwork for sustainable growth, enabling Barcelona to lead in research, innovation, and economic development within the life sciences sector.

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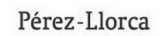
Public partners



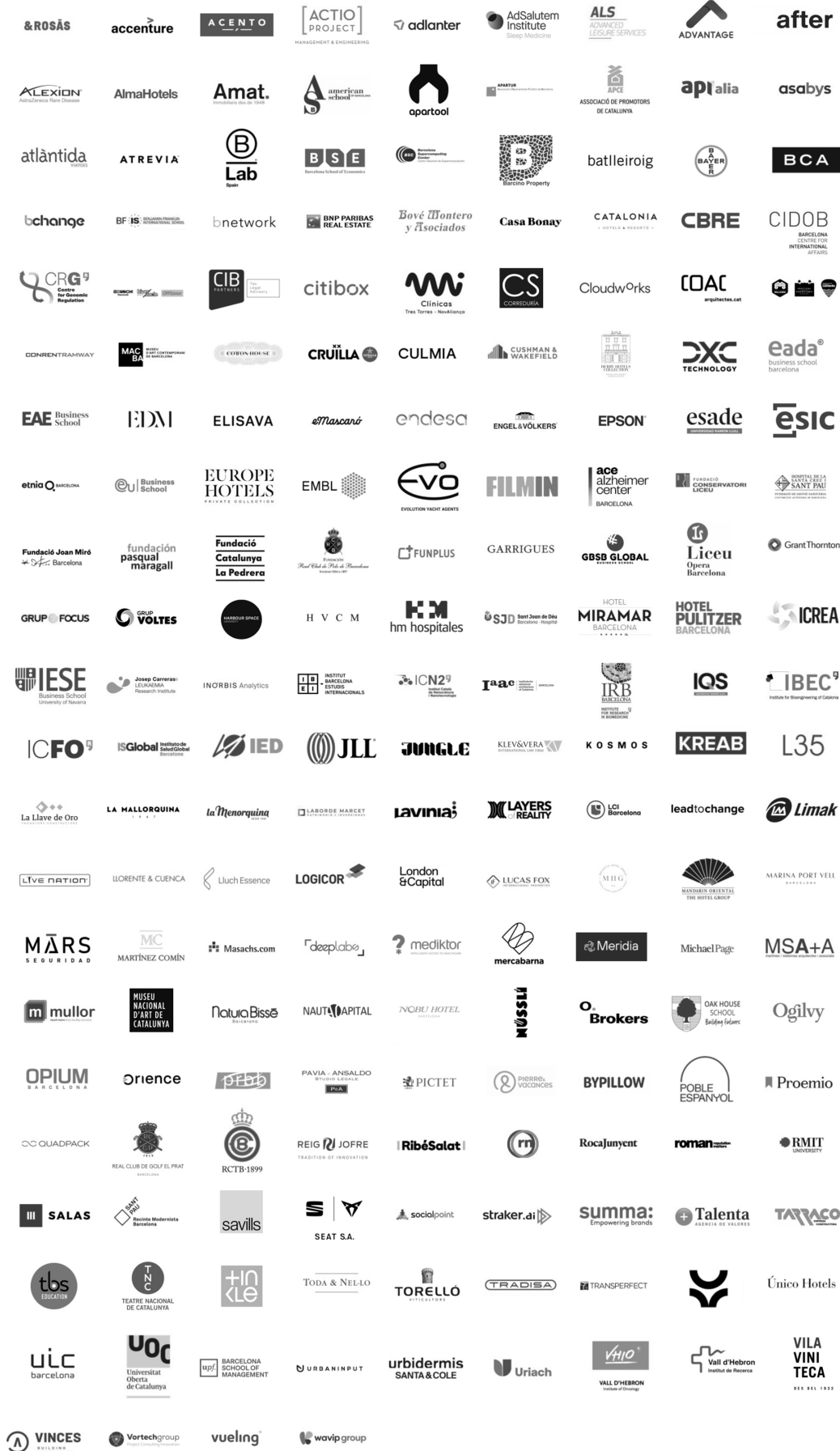
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