

Barcelona Global International Talent Monitor[®] 2019 Report



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Going above and beyond to attract international talent



Barcelona has faced many challenges in the second decade of the twenty-first century, which is now drawing to a close, and it has overcome most of these with flying colours. During this time, the Catalan capital has consolidated its position as the largest technopole in southern Europe and one of the largest on the continent. This is an extraordinary achievement given the situation we faced back in 2010, when the global financial crisis cast a long shadow on Europe's future. Today, our city continues to be a benchmark in a number of industries and it is still admired by many people from all corners of the world who come to visit the city and ensure its continued place as a leading tourist destination.

Talent, dynamism and beauty are Barcelona's natural drivers that allow it to achieve these milestones, but they require the traction provided by organisations like Barcelona Global, which work tirelessly to boost the city's international reach. One of its most well-known initiatives is the International Talent Monitor, whose fourth edition is being held this year and which Banco Sabadell is supporting once again. Together we share the goals and vision of Barcelona Global and we believe that this bi-annual study focuses on a particularly vital group – expats living and working in the city. Their opinions are an invaluable source of information that allows us to assess the strengths and weaknesses of Barcelona from an international perspective and to continue moving forward in the pursuit of our common goals. This is precisely the aim of the International Talent Monitor, a study that has already proved itself in past editions to be a key factor for making progress.

2019 has been an important year for the partnership between Barcelona Global and Banco Sabadell. With our partnership agreement, which was renewed in June, the bank made a commitment to continue supporting the International Talent Monitor and also the Hola Barcelona Cocktail, an emblematic event that offers us a chance to welcome international professionals who have chosen to live and work in Barcelona. In June, we also jointly held the Barcelona London Day, an event that seeks to strengthen the Barcelona brand in the UK capital, an influential city and a role model when it comes to international reach.

We are very proud of these joint initiatives and we hope to continue engaging in them to leverage future opportunities in Barcelona, to help the city overcome any difficulties that may lie ahead and to work on the areas of improvement brought to light by this new edition of the International Talent Monitor.

Our city is very important for its citizens, but it is also at the core of a dream that extends even further: it is vital for those living nearby and those who live further away who are pulled by its magnetism, attracting more and more talent from all over the world with each passing day. This is why Barcelona Global and Banco Sabadell are still fully committed to Barcelona; we want it to continue being ranked among the best cities in the world, to the benefit of all of us who live and love this city.

A handwritten signature in black ink, appearing to read 'Carlos Ventura'.

Carlos Ventura

General Manager for Banco Sabadell

Attraction, retention and creation of talent in Barcelona



A city without international talent is a village, and we want Barcelona to remain a global city, a magnet for talent and economic activity. After 6 years of asking Barcelonians by choice about Barcelona with the International Talent Monitor, we need to keep the emphasis on key issues that need to be done if we really want to guarantee better opportunities for those choosing Barcelona as their city. By creating an affordable international school that is devoted to offer quality education in English to talented families arriving in Barcelona, improving the Spanish tax system to fairly compete with cities like Milan, Lisbon, Amsterdam or Berlin when convincing the best to come, or facilitating and making it easier for all the procedures associated with red tape, we will certainly help Barcelona to be a better city. If we, as Barcelonians by birth, also open our homes, jobs, and culture to those who want to be part of our common future, then Barcelona will again be writing pages in history.

This is what Barcelona Global has been pushing since the beginning and the International Talent Monitor has been a great tool to assist in achieving that. Since 2013 we have conducted this biennial survey. This fourth edition has been made possible again thanks to the precious support of Banco Sabadell. Barcelona Global members also committed their time, resources, and talent to make it happen. A special thank you also to the work done by our advisory committee, our scientific director, Sebastian Reiche, and to the project's team.

For Barcelona Global, it is a call for action to improve the integration of international talent in the Barcelonian society. With this objective, the past years we have launched initiatives such as:

- **Benchmark fiscal:** Tax amendments proposals aimed at improving the city's capacity to attract international and local expatriated talent and promote Barcelona as a global hub for entrepreneurship.
- **Partner Program Emparejados:** To facilitate the attraction of high-level scientific talent through the work insertion program for researcher's partners.
- **Hola Barcelona! Program:** To attract, integrate and engage international residents who have decided to live and work in Barcelona with events such as the Hola Barcelona! Cocktail, to private dinners and events connecting Barcelonian by choice and by birth.
- **Fundación BEST (Barcelona Engineering Science & Technology):** Dedicated to the financing of interuniversity degrees of international excellence. In September 2018, the new degree "Bachelor's Degree in Industrial Technologies and Economic Analysis", jointly imparted by the UPC, the UPF and FemCat has been launched.
- **Scale-Up Monitor:** Study based on a survey among the scale-up ecosystem, to analyse and propose a set of measures to improve Barcelona's status as a global hub for entrepreneurship.
- **Work in Barcelona:** Creation of a landing page in collaboration with various private companies, to be a reference page showing companies in Barcelona that are actively looking for international talent. The page will contribute to position Barcelona as a city to work and give visibility and traffic to open positions in the digital area through the implementation of online marketing campaigns.

With the results of the fourth edition of the International Talent Monitor, we will again be able to track the factors that make Barcelona attractive to international Talent and the issues they may face when they arrive.

We look forward to launching new projects to better attract and retain the best international talent in Barcelona.

A handwritten signature in black ink, appearing to read 'Pau Guardans'.

Pau Guardans
Chairman of Barcelona Global

Introduction

Barcelona Global is a private, independent and non-profit association made up of 216 of the city's leading companies, research centers, entrepreneurs, business schools, universities, cultural institutions and more than 760 professionals. Our mission is to make Barcelona one of the world's best cities for talent and economic activity.

More than 130 of our individual members live and work outside of Spain, forming the Barcelona Global International Council.

Approximately 20% of our individual members are "Barcelonians by choice", talented people who have chosen Barcelona as their "home" to live and work in.

In a world where talent moves capital and cities are the engine of progress, Barcelona has the opportunity to become a global reference. In a public-private collaboration scheme, relying on its urbanism, resources and infrastructure, we advocate for a city project based on entrepreneurship, research, culture, tourism and social inclusion.

The target of the survey is talented internationals living and working in Barcelona, who are categorized as follows: business professionals, researchers, investors, entrepreneurs, artists and athletes.

The survey analyses the following subjects: Working Conditions, Doing Business, Social Integration, Education, Living Conditions, and General Perception.

After analysing the results of the survey, Barcelona Global has actively worked to help integrate international professionals into the Barcelonian society and business world.

The objective of this fourth edition is to continue working and following up on the evolution since 2013.

The first edition was initiated in 2013 by Gonzalo Rodés, Barcelona Global Honorary Chairman, and has since been launched every 2 years. The 4th edition of the International Talent Monitor survey was launched in April of 2019, with the final results being released in November.

Methodology

The 4th edition of the Barcelona Global International Talent Monitor was answered by a total of 1,021 international researchers, employees, entrepreneurs, investors and artists living and working in Barcelona.

The project has been supervised by an Advisory Committee of 12 experts who validated the main steps of the project and 6 focus groups have been organized with leaders from different industries.

Many questions ask respondents to rate satisfaction, importance, helpfulness, etc., using the following scale of 7 possible value options. Each question specifies the type of rating.

Questions also include an option to indicate "I don't know the response/I don't have an opinion" (D/K) or "This question does not apply to my personal circumstances" (N/A).

When available, the 2019 figures are compared to those of 2013, 2015 and 2017.

120 international organizations (companies, public institutions, research centres, trade agencies, foreign chambers of commerce, associations, and international schools) have been involved in the distribution of the survey.

During the month of September, 6 focus groups have been conducted with leaders from different industries relating to the international talent in Barcelona (directors, entrepreneurs, digital talent, researchers, education professionals, investors), receiving the feedback of 58 experts.

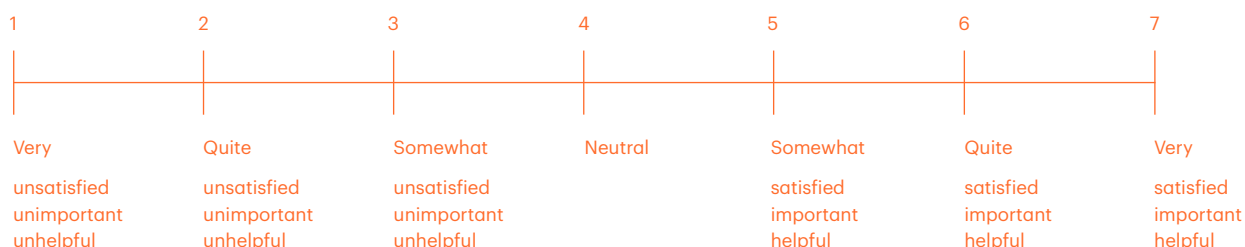
This year the 2019 survey was thoroughly reviewed, with questions being added or removed when necessary, and with the goal of making it shorter (15-minutes). The 2019 survey is composed of a total of 46 mandatory questions.

The survey was distributed to 30,000 potential international respondents and received 1,021 responses, a 25% increase from the previous 2017 survey (817 responses).

Respondents had the opportunity to answer the survey from June 25th – July 20th, 2019. An online system designed with Typeform technology allowed for the completion of the survey while fully warranting the anonymity of respondents' participation and their responses. The Barcelona Global 2019 International Talent Monitor is coordinated by Barcelona Global and directed by Carine Lebecque. It has been conducted under the scientific direction of Professor Sebastian Reiche, the Head of the Managing People in Organizations Department (IESE Business School).

Banco Sabadell has sponsored Barcelona Global to develop this fourth edition.

Below is the scale of rating:



Executive summary

Barcelona continues to be a city with a powerful capacity to both attract and retain international talent and is perceived as an international, cosmopolitan and attractive city for international talent. Assets like international connections, the cultural offerings, the sports environment, healthcare and quality of life are considered highly positive by Barcelonians by choice. Building on this great capacity as being attractive and welcoming for international talent will certainly bring Barcelona to the next level of development and the creation of better opportunities.

In order to jump into a new dimension of becoming a global city, some barriers need to be solved especially when talking to attract senior or more mature talent (people with at least 10 years of experience). As the previous Talent Monitors have shown, administrative processes, taxation, education of children, housing, cost of living and low salaries are the key issues where Barcelona needs to improve. This year, the political situation and safety grew as an increasing concern amongst international respondents compared to previous editions.

When looking at the profile of respondents, Barcelona has accelerated its profile as a tech and entrepreneurial city, with a great capacity to attract young technological talent. Most of the respondents are newcomers living in Barcelona for less than 2 years (38%), working in the tech sector (25%), and are Europeans (65%) with a master's degree or PhD (70%).

All ratings are out of 7: 1 being the lowest, 7 the highest and 4 neutral.

1. A powerful brand to attract international talent

Respondents of the survey perceived that Barcelona could be considered a cosmopolitan global city (5.7) and that the ease of attracting international talent is quite satisfactory (4.9). The presence of an international community is seen as positive (5.8), followed by the infrastructure for international connectivity (5.9).

Within investing in a business (3.9) or starting-up (4.1) in Barcelona, data shows that the satisfaction of respondents has been slightly decreasing, although it remains at a neutral level.

Respondents are somewhat satisfied with the working conditions in Barcelona (4.9), with running businesses (4.9) and the business environment (4.9) in general.

In a qualitative analysis, all those issues were ratified and the need to scale up the profile of talent attracted to Barcelona has risen as a big issue. This would require actions on adapting the brand of the city to more mature and talented individuals with the hope to attract and more importantly to offer more job opportunities and competitive positions in Barcelona for highly skilled and experienced professionals.

2. A networking and open city

The survey results show that internationals are quite satisfied with their social integration (5.2), feel somewhat part of the local Barcelona community (4.4) and are willing to integrate into the local community (5.9). The satisfaction level of local openness

towards international professionals is over the average (4.8) yet leaves room for improvement. The prevalence of the use of English in Barcelona has increased going above neutral this year (4.4).

Majority of internationals do not find the use of the Catalan language as a significant issue (80%). Preoccupation over the political situation has increased this year with a much lower satisfaction rating (2.6).

Concerns on how to accelerate integration in the social life of the city has systematically risen in the qualitative part of the project and the need for institutions (both public and private) to increase the use of English for events and communications.

3. Quality of life is still excellent, but safety and administrative issues have risen

The overall satisfaction in lifestyle/living conditions in Barcelona is positive, above (5.5) with internationals being somewhat satisfied. In addition, accessibility to sports and exercise (5.8) and cultural offerings of the city (5.9) remain to be important features. Both the public (5.2) and private (5.6) healthcare systems remain at a positive level.

The satisfaction of the sustainability of the environment remains neutral (4.1). Safety and the level of security have seen a drop this year going from quite satisfied to neutral (4.0).

Administrative process is still an issue when landing in Barcelona (3.3) with respondents being not quite satisfied with the legal environment (3.7).

An exceptional quality of life has been identified as the main point of attractiveness of the city during the focus groups, however a growing concern about issues like security may affect the image of Barcelona as a safe city. Increasing difficulties to complete administrative processes and an unstable legal environment are seen as blockage points and not at the level of European standards.

4. A lack of offering international education for families

The overall level of general satisfaction with the school system in Barcelona has decreased since the last edition (4.7). The most important criteria when selecting a child's school is still the language being used (5.8).

Majority of international children attend international schools (46.5%), followed by concertadas (publicly funded, independent school) (23.3%) and lastly, local public schools (21.3%). When asked what they would improve in terms of education in Barcelona 64% of the respondents answered with offering better international options (public, concertada and private).

During the focus groups, international parents and education professionals identified the cost of the private international schools in Barcelona as the main issue. Respondents are not affected by the use of Catalan, but they see it as a challenge. When selecting a school for their children, they lament the lack of international languages taught in public and concertada schools.

5. Cost of living increases while salaries stagnate and taxation remains high

Satisfaction with the cost of living has decreased this year (3.8) going below neutral as has the competitiveness of salaries relative to other countries (3.0). The satisfaction with the housing market (3.1) is also rated low amongst internationals residing in Barcelona.

Data shows that internationals are not satisfied with neither their individual income tax (3.8), corporate tax (3.8), nor wealth tax (3.5).

Participants of the focus groups, especially those who have been living here for more than 5 years, said Barcelona in the past was considered as a city offering low salaries but the low costs of living would compensate it. Today as the cost of living in the city is increasing rapidly, especially housing, and as taxation remains high, Barcelona is losing its competitiveness. Those aspects seem to be a real turn off when it comes to attracting and retaining senior talent where costs of living and low salaries are a barrier. Wealth tax is also perceived as a barrier that prevent talented professionals with assets to come, live and invest in Barcelona.

Call to action 2019

1. Create a single point of access and processing devoted to international talent dealing with administrative procedures.

Once the City Council has created a good web platform with information on what is needed when relocating to Barcelona, a next step should be taken in order to have an impact on procedures and accelerate them as well as make life easy to those talented professionals willing to clarify their legal situation in Barcelona. A call for a single point of information and process office is urgent if we really want to become a magnet for talent.

2. Push for taxation improvements for international talent and companies.

Barcelona Global launched a Working Group on taxation for startups and scale-ups with the prestigious firms Garrigues, Cuatrecasas, Deloitte, Uría Menéndez, Osborne & Clarke, KPMG, Martínez Comín, Gómez-Acebo y Pombo, Toda Nel·lo, EY, PwC and Roca Junyent. The Group has evaluated the fiscal and commercial treatment of the entrepreneurial ecosystem in different international jurisdictions, has run an in-depth analysis of different elements of the current tax system and is currently working on a series of improvement proposals.

3. Launch an affordable international school to welcome children of international families.

Barcelona Global, in the context of the Barcelona Agenda Project financed by Fundació Puig, CaixaBank, Banco Sabadell, Agrolimen, ISP-Rebold, Catalana Occidente, Port Aventura and Unico Hotels, is working to address this issue. A research to identify the features that a new international school in Barcelona has been performed and the team is now in the process of evaluating the viability of an economic model and identifying potential partners and operators.

4. Push for a metropolitan housing policy.

Barcelona Global has worked with more than 50 experts among architects, urban planners, tax consultants, developers, builders, investors, financial institutions, foundations and technology companies in the report, "The challenge of housing in Barcelona: proposals for a necessary solution". The document is committed to a metropolitan management of the housing policy and an increase in stock for affordable housing, with public impulse and private investment. The report has been submitted to all public authorities in this area to work with them.

Results

1. Barcelona as a global city 10 Global Strategic Indicators

We selected 10 main indicators reflecting the main trends. As global indicators we identify and follow the perception of 10 key topics for Barcelona's competitiveness.

2. Barcelona key topics Top 10 and Bottom 10 Indicators

We asked for the perception as of today on 20 key topics. The highest rated indicators (Top 10) are those in which respondents expressed the most satisfaction. The lowest rated indicators (Bottom 10) are those in which respondents expressed the least amount of satisfaction. They exclude the 10 global indicators.

3. Integration

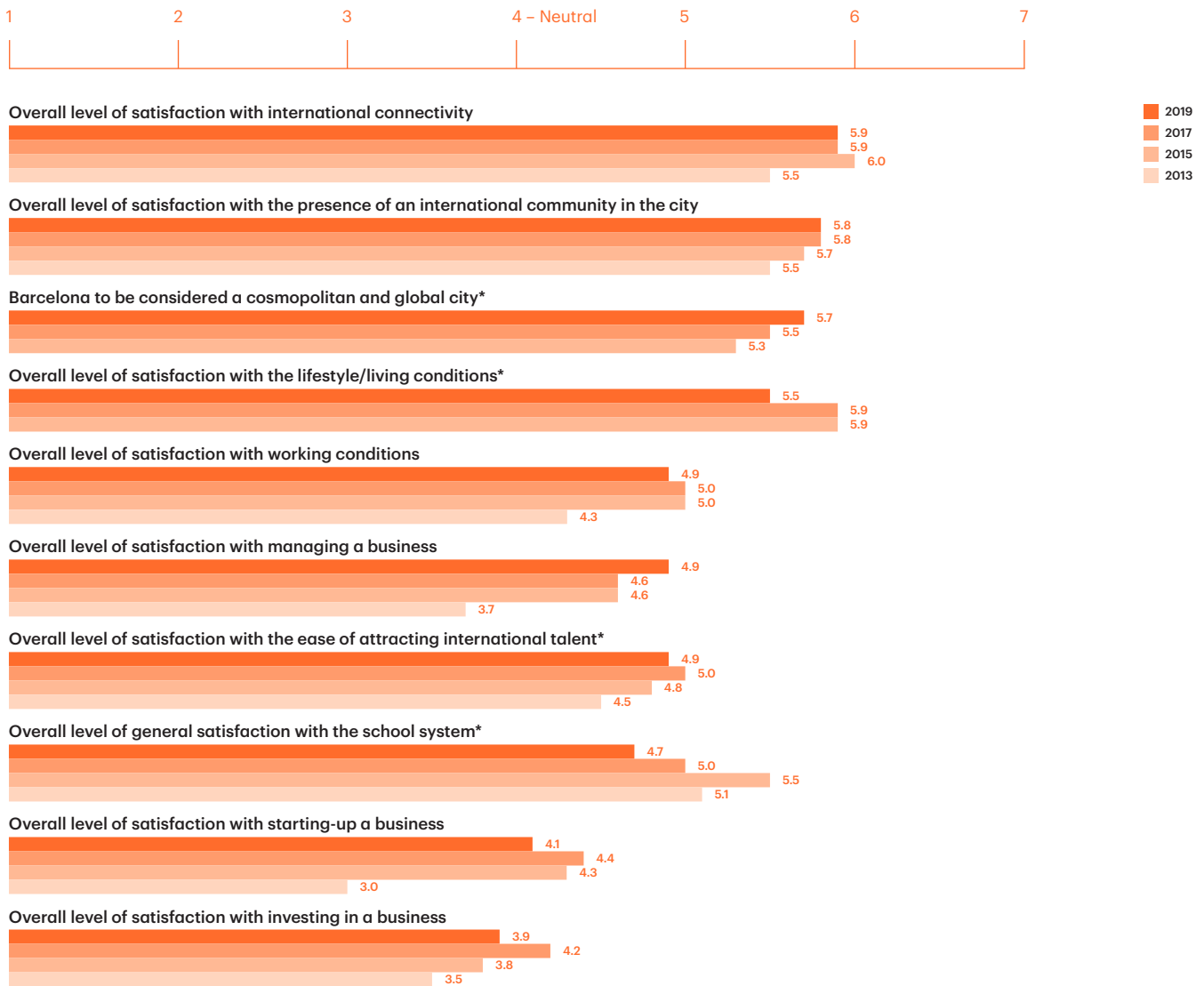
We asked questions about how respondents perceive their integration in Barcelona's local society.

4. Education

We asked respondents with children for their opinion about education.

We enriched the quantitative analysis results with the feedback of the focus groups to draft the conclusions.

10 Global Strategic Indicators



* Shows a statistically significant difference ($p < .05$) to 2017 level.

Data shows that there has been a pattern of stability in the overall satisfaction of global strategic indicators in Barcelona.

Respondents are still highly satisfied with the infrastructure of international connectivity and rate that Barcelona can be considered a global city. Internationals are still satisfied with the presence of an international community, but we have seen a decrease in the ease of attracting international talent.

Within investing in a business, starting-up and running businesses in Barcelona, data shows that the satisfaction of respondents remains at a neutral level.

Respondents are quite satisfied with the working conditions in Barcelona, with no shift since the 2015 results.

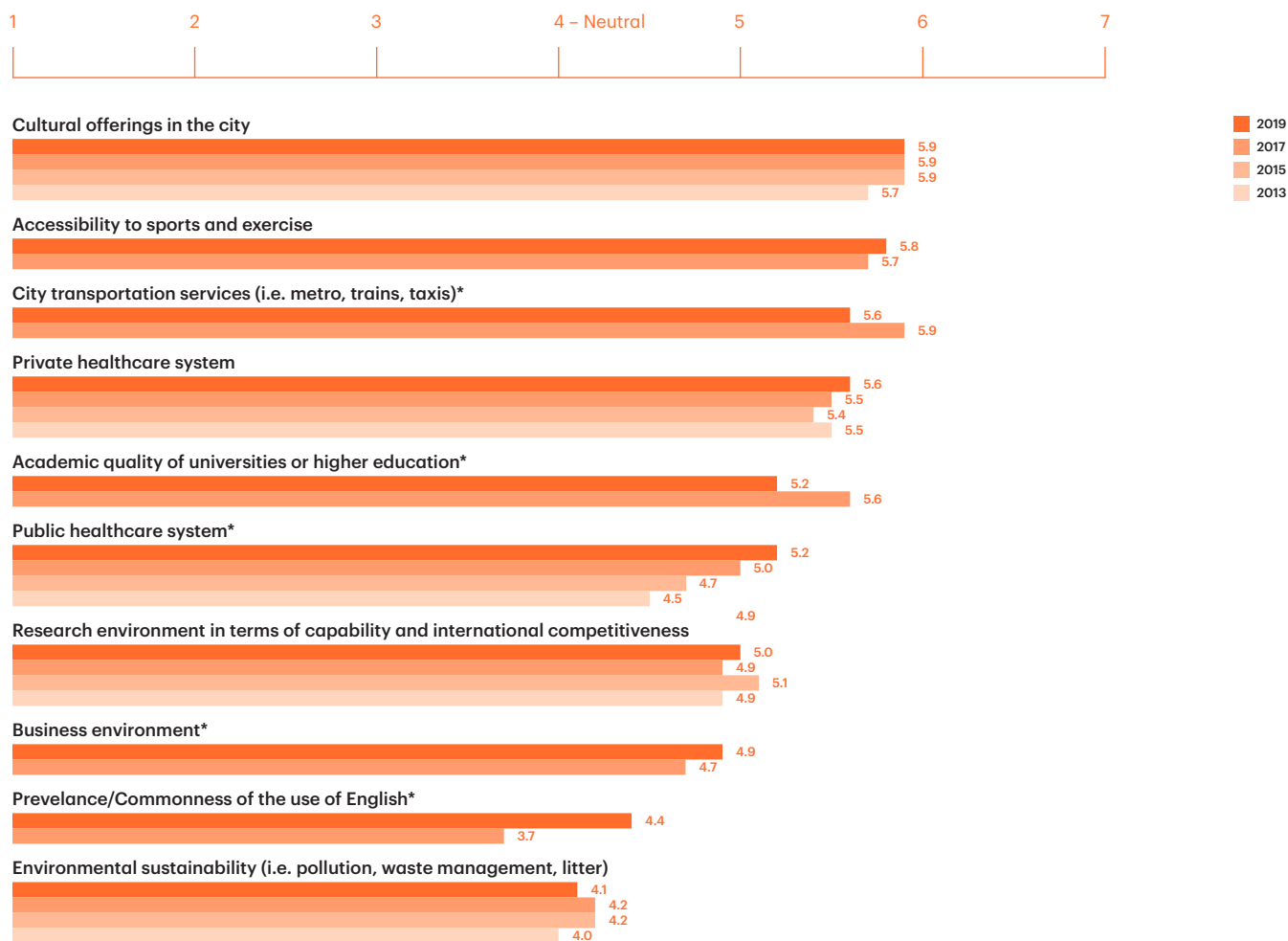
Two areas have fallen in satisfaction from the previous surveys: the school system in Barcelona and living conditions, the later being mainly due to the increasing costs of living and the difficulty to find good and affordable accommodation in the city.

From the focus groups feedback we have learned that it is easy to attract young digital talent and that the city offers a lot of opportunities in the area, mainly for tech and entry level jobs. However, it becomes more complex to attract and retain senior talent as the city offers very few opportunities and job offers are not attractive when compared to other countries.

Many young people are getting started in Barcelona (Master's, PhD, MBA, first corporate job) but after a few years they go abroad where salaries and opportunities are better. Barcelona is excellent at attracting and training talent but needs to be able to retain it.

In order to attract and retain more senior talent, Barcelona needs to go to the next level of launching more ambitious projects and attracting more investment.

Top 10 Indicators



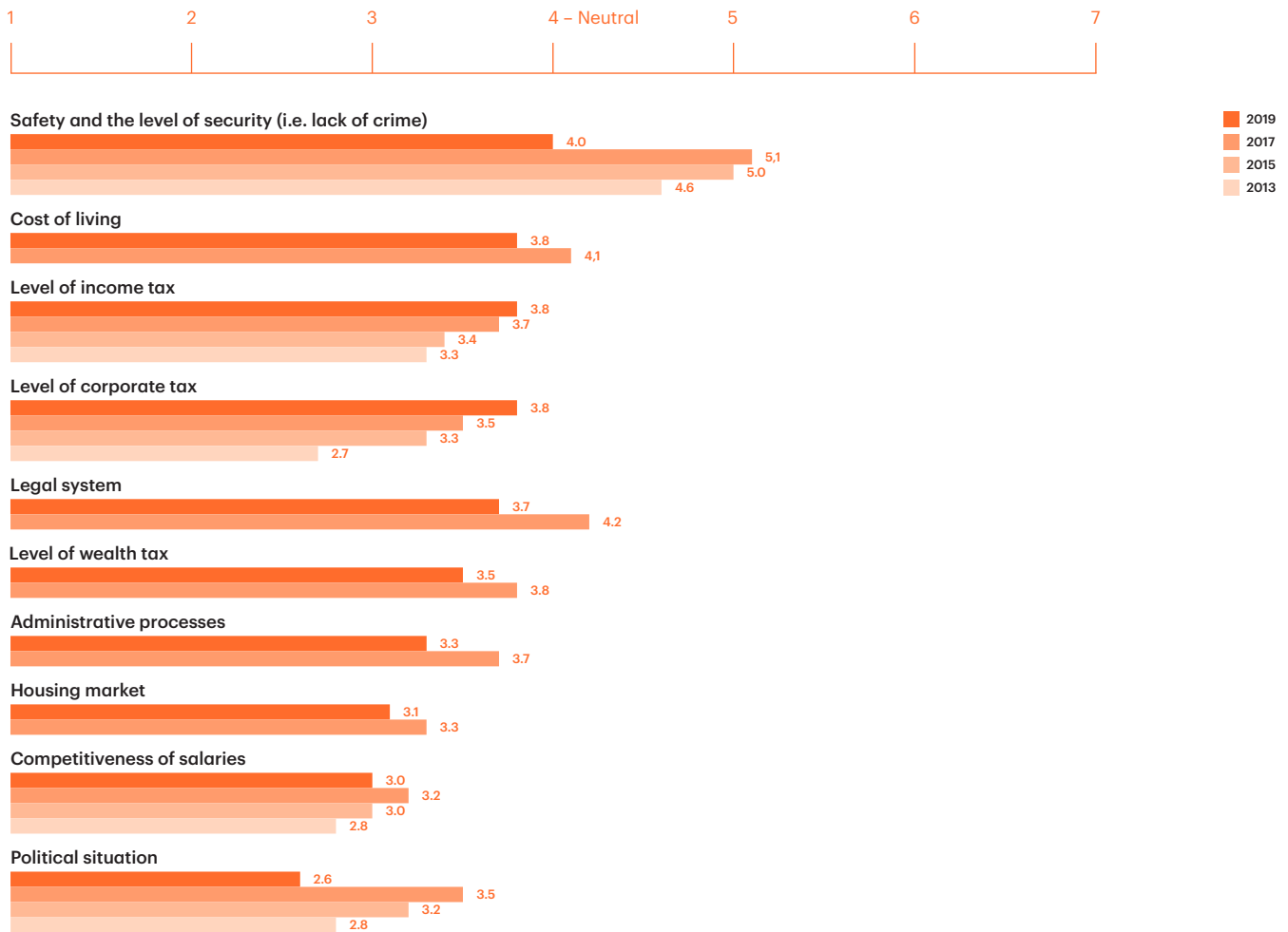
* Shows a statistically significant difference ($p < .05$) to 2017 level.
(Main indicators excluded)

The highest rated indicators for international respondents are the cultural offerings in the city, the accessibility to sports, city transportation services, both public and private healthcare and environmental sustainability. Most of the criterias have seen an increase this year compared to the 2017 results.

Respondents also highly value the quality of universities and research environment. The business environment and the use of English are seen as even more satisfactory this year while environment sustainability perception remains neutral.

From the focus groups feedback, we have learned that the lifestyle is the main pull factor when convincing someone to come and live in Barcelona. Barcelona has a powerful brand and is perceived as an attractive, tech, networking and cosmopolitan city.

Bottom 10 Indicators



* Shows a statistically significant difference ($p < .05$) to 2017 level.

From the data, we have seen that most of the lower rated indicators of 2017 have an even lower rating this year.

The main barriers identified by the analysis of data to attract international talent have been all confirmed during the focus group sessions, where following specific issues have been highlighted:

Bureaucracy: When obtaining a NIE, it has become extremely difficult to get appointments (reselling of NIE appointments by private companies has developed into a business) and visa issues for non-EU talent (problems of recognition of foreign diploma and excessive duration of the process).

Housing: High price and poor quality of housing have been highlighted. The cost of living in the city is increasing rapidly, and this is a problem for young international talent, as well as for local young talent.

Salaries: Have not increased with the cost of living. Even if they are better in the digital world, it is mostly for junior positions (service activities or developers) and is seen as a turn off for senior talent to come to Barcelona.

Lack of job opportunity for senior talent: Few positions are available for experienced individuals. Additionally, many students after completing their business schools (Master's and especially MBA), do not find suitable jobs and salaries in Barcelona although they would like to stay in the city. Barcelona seems to be an excellent training place for talent but should be able to keep them and benefit from their skills.

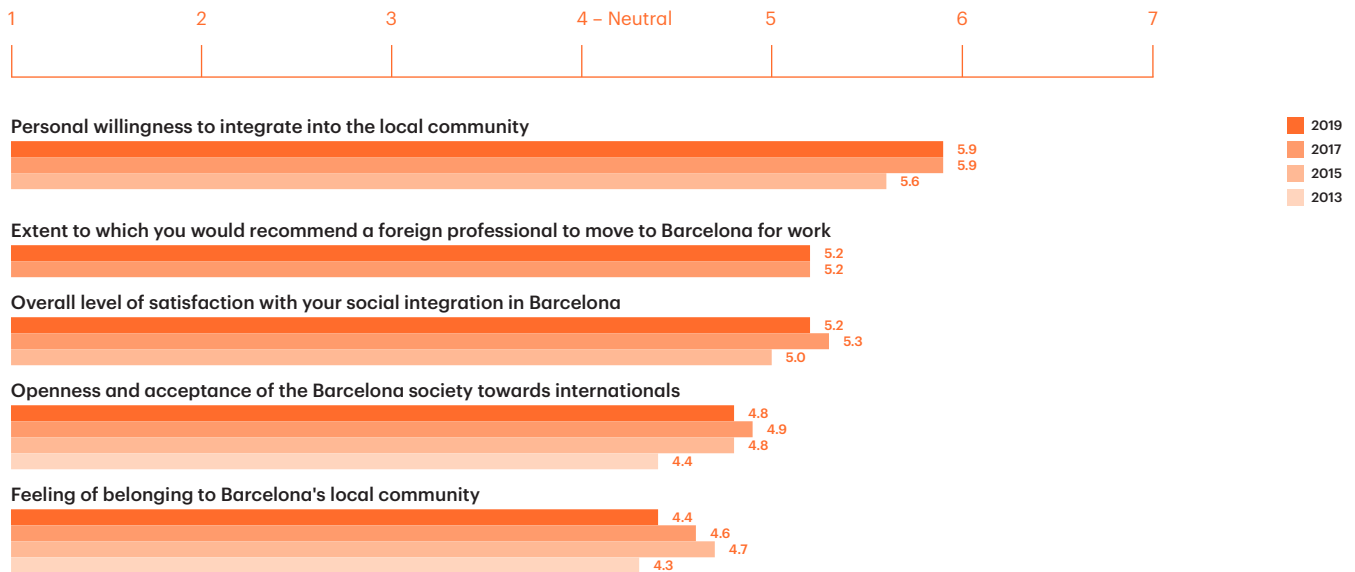
Taxation: Wealth tax is a turn off for attracting international senior talent. It also limits investment. Income and corporate taxation are not attractive when compared to neighbouring countries.

Politics: The feeling of the situation being paralyzed by a lack of government at the local and national level and an uncertainty about regulations and direction blocking investments.

Lack of affordable international school whether public or private and curriculum offered in international languages.

Safety has become an issue in the past year. Many internationals have had their experience with insecurity and think that this can alter the image and attractiveness of the city.

Integration



Data shows that international respondents are willing to integrate and would recommend a foreign professional to move to Barcelona.

They are still quite satisfied with their social integration, openness and acceptance of the Barcelona society towards internationals.

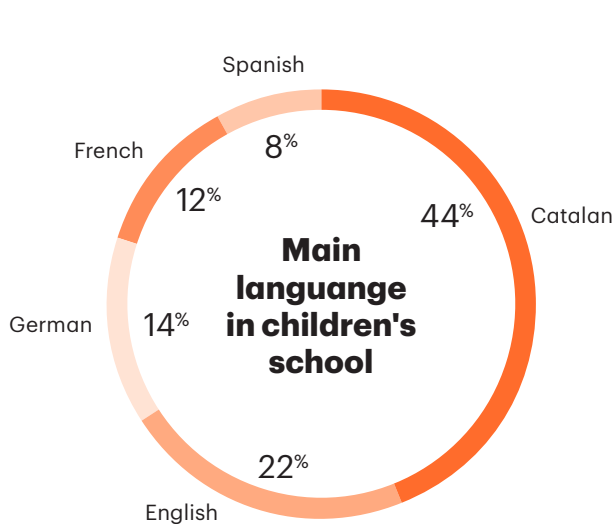
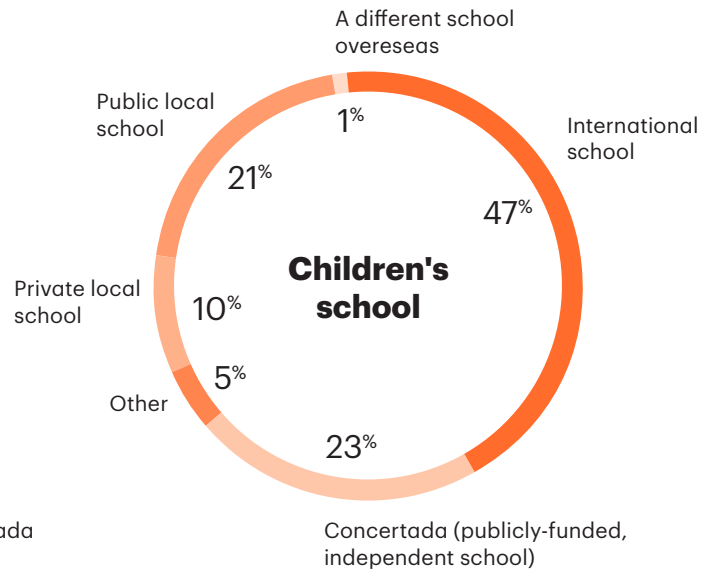
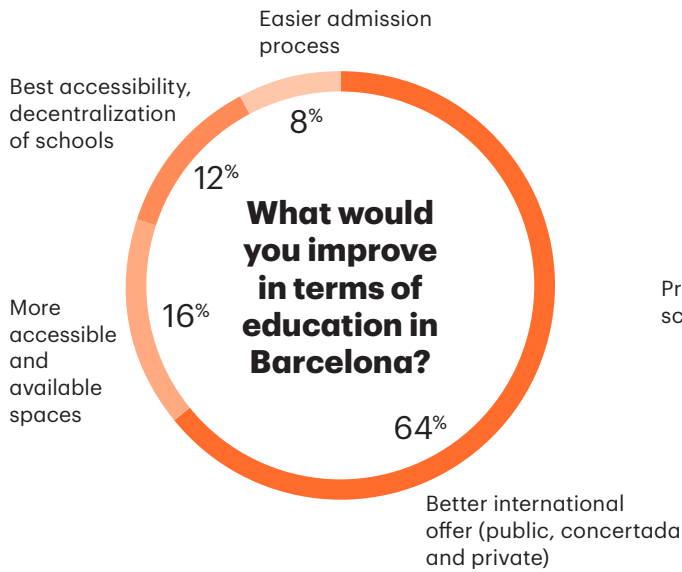
However, there is room for improvement when asked if they feel part of Barcelona's local society as it is rated just above neutral.

Segmentation shows that integration is a bit more difficult for newcomers (those who have arrived less than 2 years ago).

The comparison of data on plans and reason for leaving between newcomers and long-term residents shows that younger talent sees Barcelona as somewhat of a pit stop for a few years with then moving on to better opportunities rather than staying long-term and making local integration less necessary. As a city, we would want to attract foreign talent early on but also have them remain.

From the focus groups we have learnt that many of the tech talent feel integrated in the city but mainly stay within the international community and interact in English. Language is still a barrier to interact with the local community. Those who have been living in Barcelona for more than 10 years feel more integrated within the local society, but some have seen an increasing divide between communities. They would recommend Barcelona as a place to live for foreigners but stress that there is a lack of opportunities for senior talent. Many professionals also are based in Barcelona but work or have businesses in different countries, working remotely from here so not having the need to integrate within the local community.

Education



Data shows that respondents want a better international offer in Barcelona and that an affordable international school is needed for international parents living in Barcelona.

During the focus groups, it has been highlighted that the cost of private international schools and the lack of spaces are difficult for some families in order to have the education they would want for their children. They lament on the lack of international languages taught in public and concertada schools.

Additionally, there is a need of international schools in areas like Poble Nou and Poble Sec where the international population tends to grow. All international schools are being concentrated in the upper areas of the city.

Respondents' Profile

Demographics, localisation and professional status of the respondents are detailed in this section.

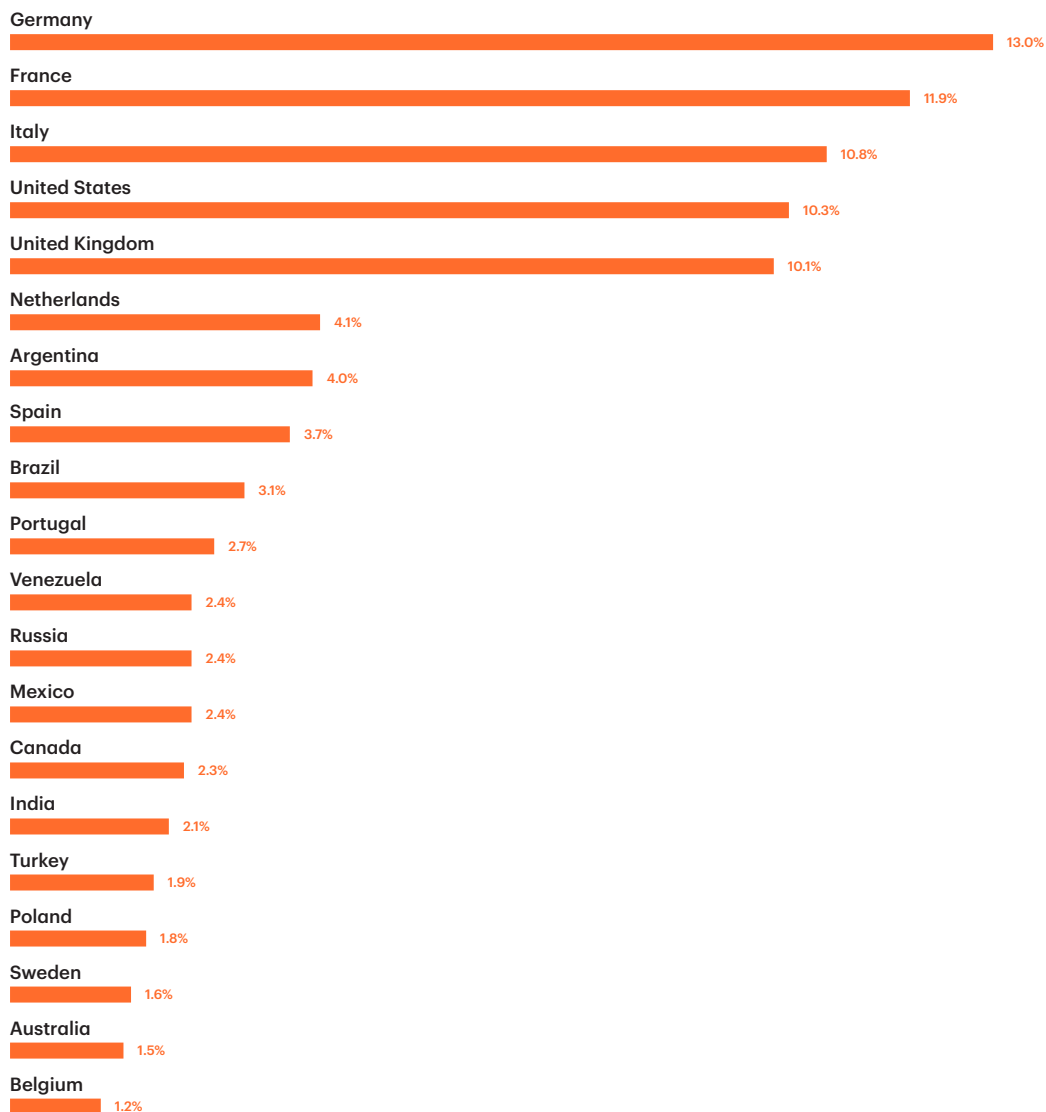
The profile is very much in line with the 2017 respondents' profile. A similar group, with 98 nationalities represented amongst the respondents.

Still mainly Europeans, highly educated, working, gender balanced group with a bit more digital talent, younger people and newcomers this year.

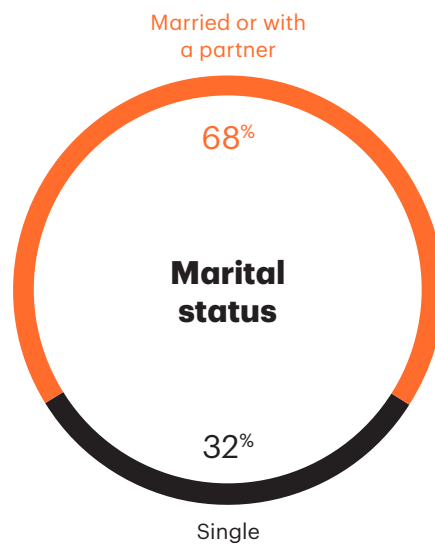
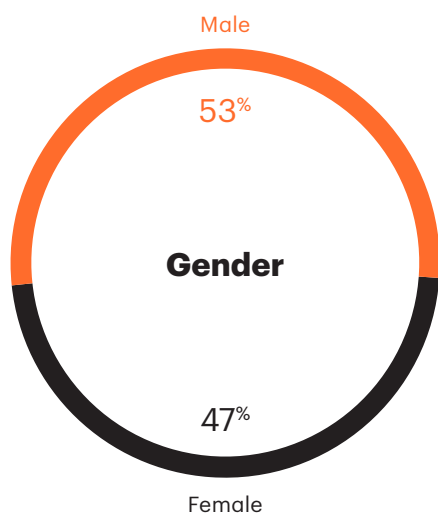
When doing the segmentation on different groups of professionals, data shows that there are no drastic differences in the perception and same trends are identified.

Demographics

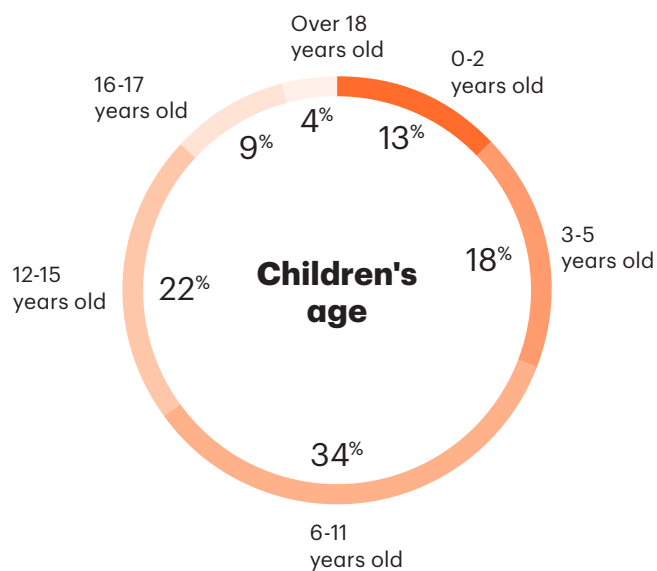
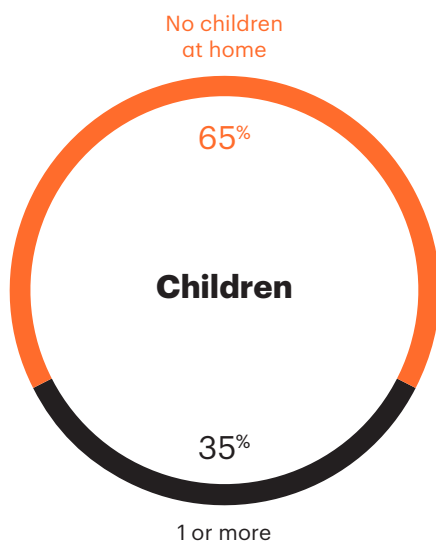
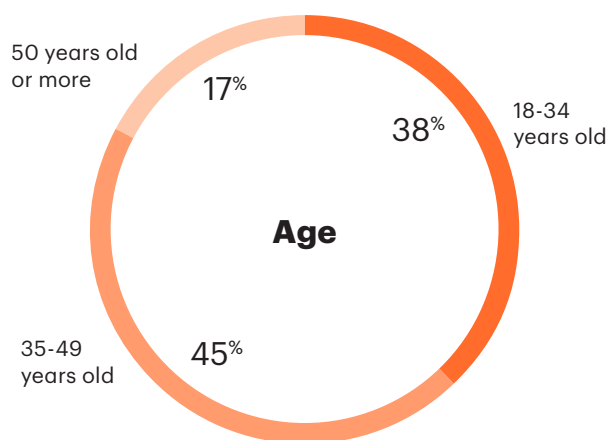
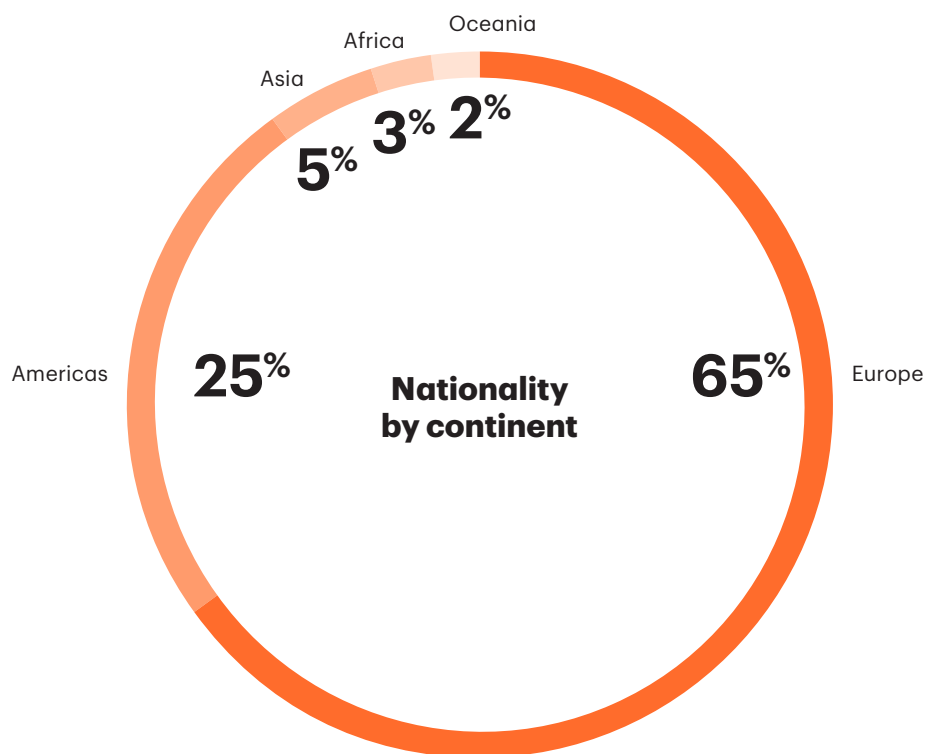
Nationality by country



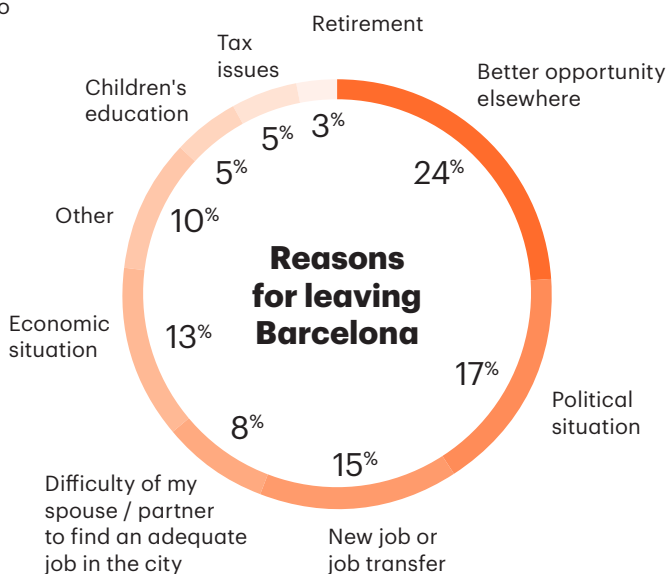
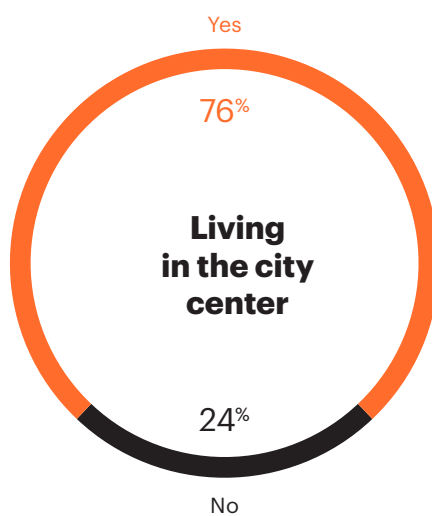
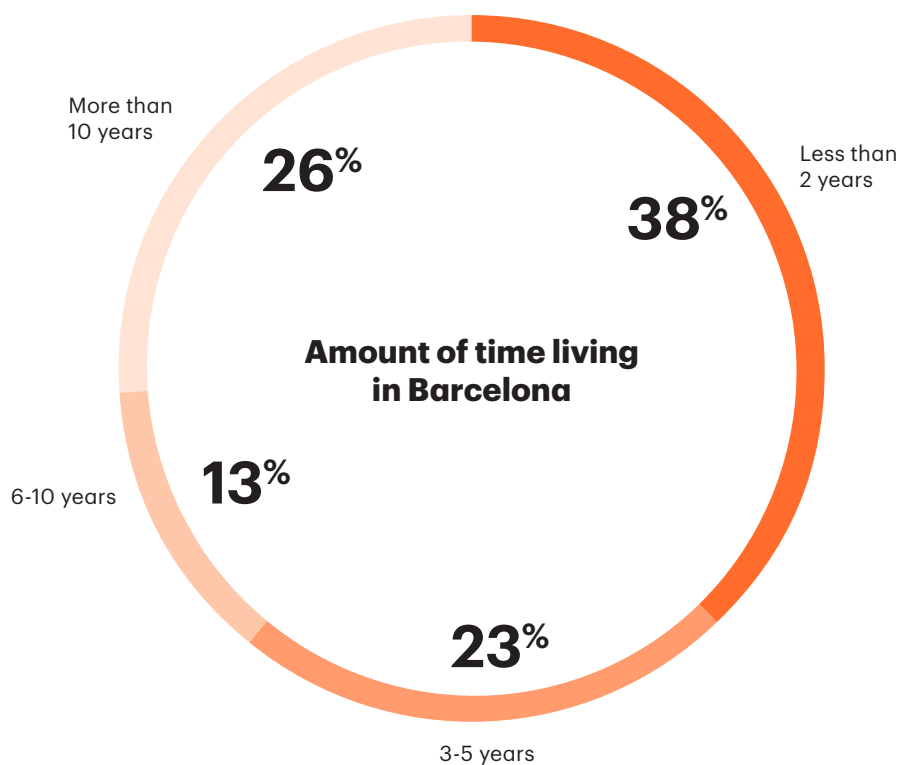
Multiple nationalities possible



Demographics



Localisation

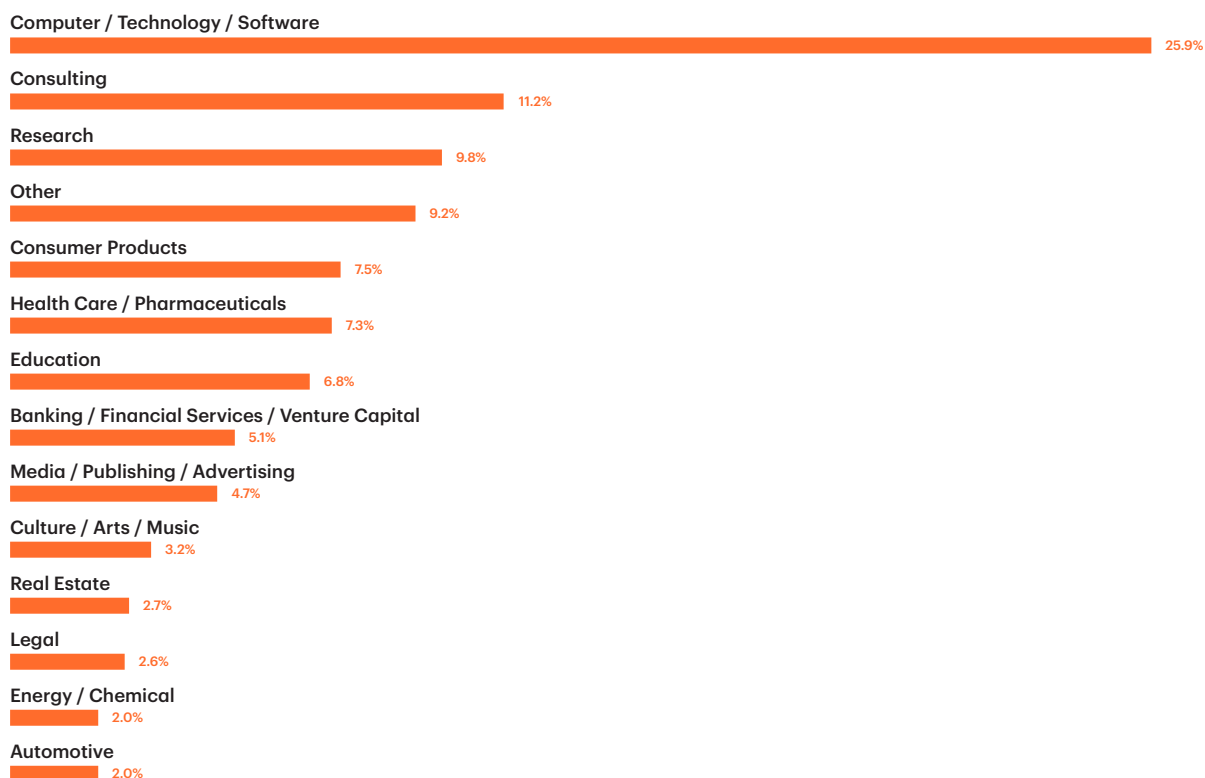


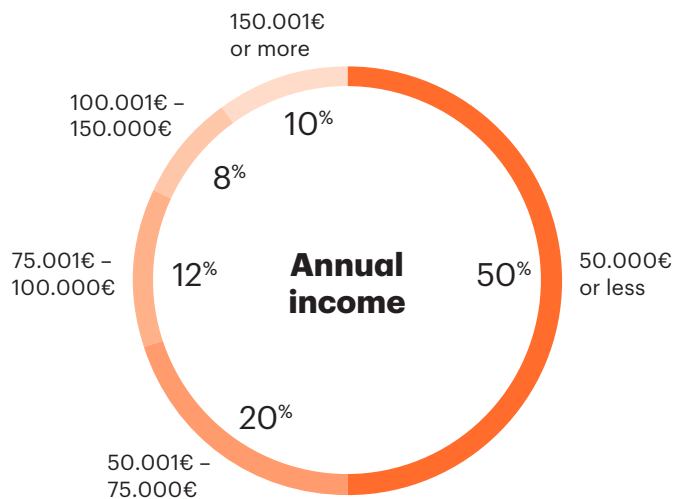
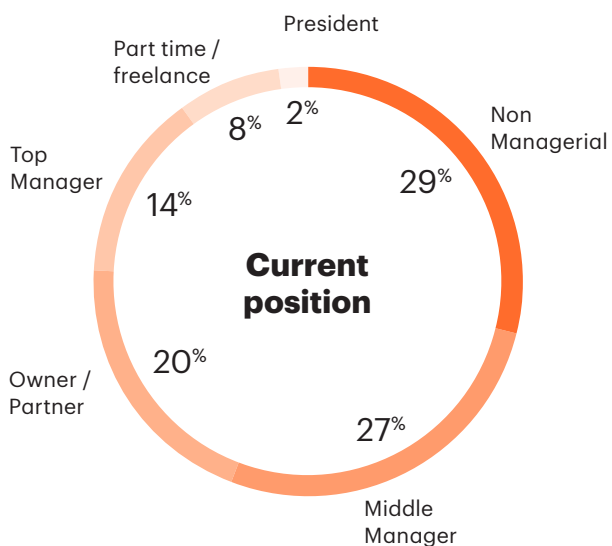
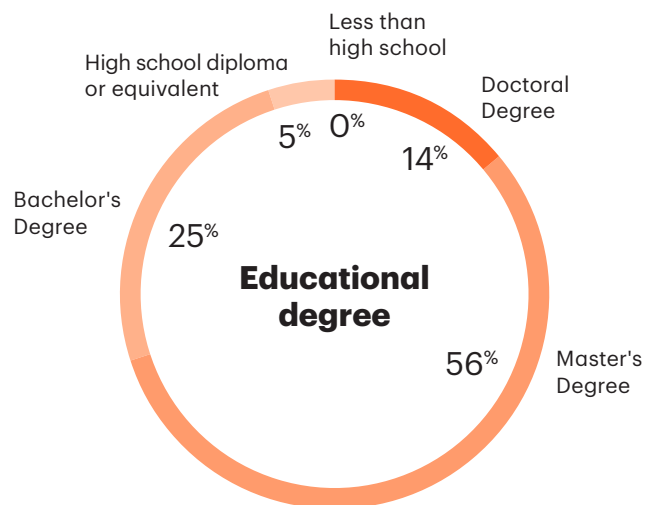
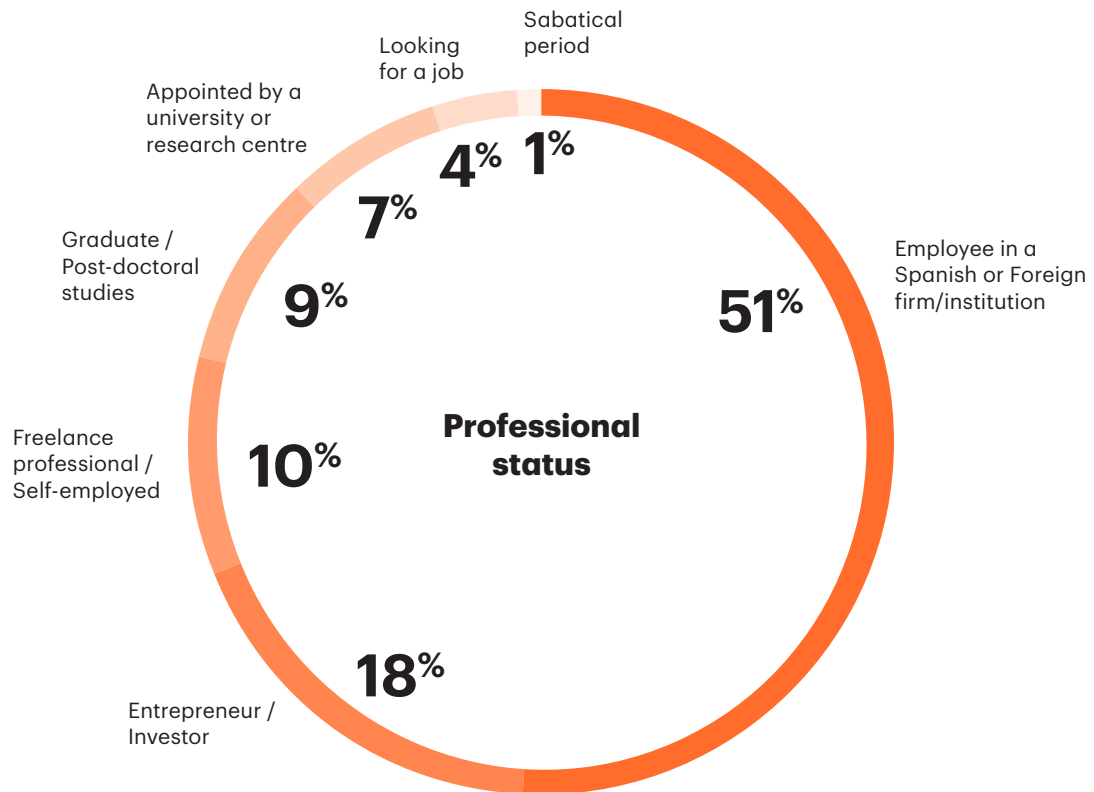
Professional Status

Are you currently working or have been involved in a business in Barcelona over the last 3 years?



Main industry





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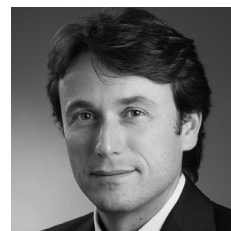
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Partners

This new edition is made possible by the support of our partners.

With the support of:



Our scientific partners:

2019 & 2017
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2015 & 2013
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Partners who connected us to
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ACCIÓ

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de Barcelona

Netherlands Business Support
Office

Red Global Mx Barcelona Chapter

Spanish-Portuguese Chamber
of Commerce

Swedish Chamber of Commerce
Barcelona

UK Department for International
Trade

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American School of Barcelona

Barcelona Executive Business
School Barcelona (BEBS)

Barcelona Graduate School
of Economics (GSE)

Benjamin Franklin International
School

Deutsche Schule Barcelona

EADA Business School Barcelona

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EU Business School

Happy Way International Preschool

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IESE Business School

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Park (PRBB)

Barcelona Super Computing Center
(BSC)

Cardiovascular Program-ICCC,
Institut de Recerca Sant Pau

Catalan Institution for Research
and Advanced Studies (ICREA)

Center of Regenerative Medicine
in Barcelona

Centre for Genomic Regulation

Fundació Hospital Universitari
Vall d'Hebron - Institut de Recerca
(VHIR)

Institut d'Investigació Biomèdica
de Bellvitge (IDIBELL)

Institut De Física d'Altes Energies
(IFAE)

Institute for Bioengineering
of Catalonia (IBEC)

Institute for Research
in Biomedicine (IRB)

Institute of Photonic Sciences
(ICFO)

Parc Científic de Barcelona

Vall d'Hebron Institute of Oncology
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International and Business Schools



Research Centers



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