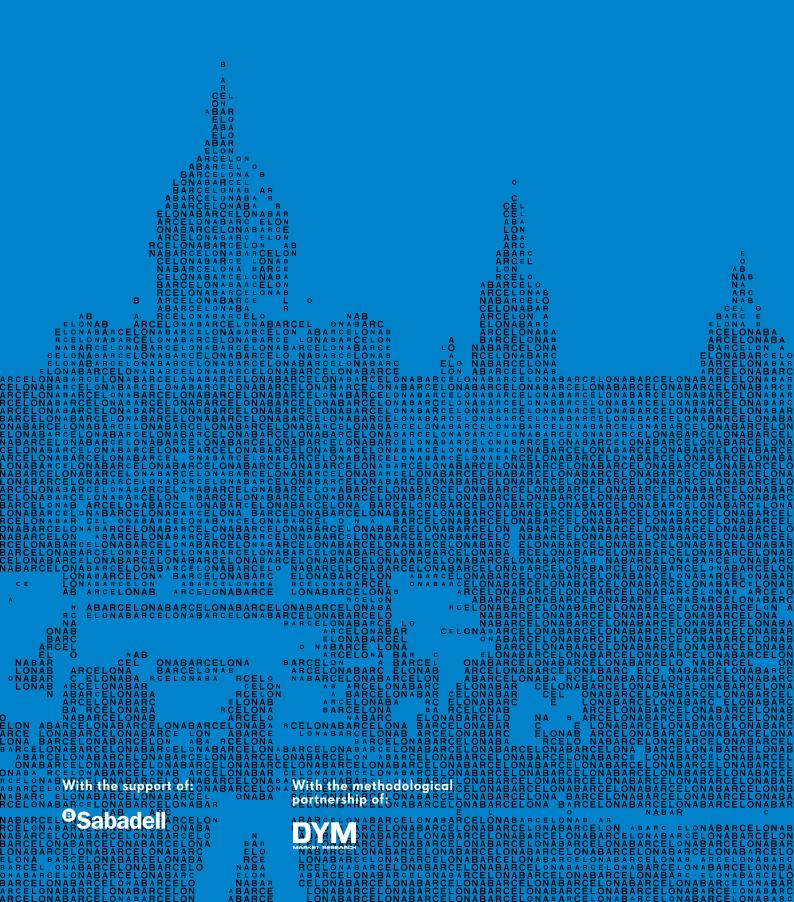
Barcelona Global 2015 International Talent Monitor Report





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Foreword





Since its foundation, Banco Sabadell is an entity with global vision and vocation. This approach not only becomes tangible through our presence in over 15 countries, but especially in our way of supporting our clients in their international development. Being a global bank allows us to respond to our customers who are increasingly companies with needs, projects and objectives to be achieved anywhere in the world.

In this regard, we are pleased to collaborate with Barcelona Global in carrying out the second edition of Barcelona Global International Talent Monitor, since it clearly contributes to Barcelona increasingly becoming a global city. It is not just a way of knowing what the high-value professionals and talent that come from other countries think, but also helps the Catalan capital continue to gain importance among international investors, given that today Barcelona is considered one of the most attractive cities to engage in business ventures. In that sense, Banco Sabadell has always been and will be attached to this important objective.

The Barcelona Global International Talent Monitor provides valuable information about what international professionals who have chosen our city to live and occupy positions in their respective companies think. To ensure our future as a city, we should listen carefully to those people to keep progressing and improving.

It is a pleasure to present, through this report and the associated website, all the results of the Barcelona Global International Talent Monitor. The challenge now is to continue adapting our city, our processes, our companies, and our ways to consolidate Barcelona into a cosmopolitan, open city integrating different ideas and cultures.

I would also like to thank Barcelona Global for implementing this initiative and the methodological support of DYM and its members for the time and talent they have devoted to this initiative to make it useful and relevant.

Carlos Ventura

General Director Commercial Banking of Banco Sabadell

Attracting talent and developing economic activity



Former NYC Mayor Michael Bloomberg once stated that "talent attracts capital in a much more sustainable and long term way than capital attracts talent". At Barcelona Global, we aim to make Barcelona one of the best cities in the world to attract talent and develop economic activity, therefore it is so important for us to know the opinions about Barcelona of those that decide to move to Barcelona to work and live.

With the support of Banco Sabadell, we are pleased to see the second Barcelona Global International Talent Monitor is now a reality. With this new edition of the International Talent Monitor, we can now begin to track the evolution of how Barcelonians-by-choice land in Barcelona, socialize with other citizens, work, do business and research, educate their children, connect with the world, are stimulated by our cultural and leisurely infrastructures, and take care of their health and needs.

This International Talent Monitor is a comprehensive source of qualitative information regarding how this strategic target group perceives Barcelona. It is therefore a unique and useful source of information for all of those institutions that work with this target group, (research centres, companies, business schools, universities), serve this target group (local, regional and national administrations), and cater to this target group (social clubs, cultural and leisure institutions, economic institutions).

For Barcelona Global, the International Talent Monitor is not only a source of information; it is a call for action. It is a call to continue acting to improve the way Barcelona collaborates with international talent. From the survey two years ago, we understood that individuals in Barcelona needed to open up to international talent, and so we launched two initiatives: the Hola Barcelona Cocktail, to warmly welcome internationals every September, and the Hola Barcelona Dinners, to open up our houses to them and treat them as new friends. We also understood that, without a proper fiscal system, Barcelona would fail to attract the best talent.

This second Barcelona Global International Talent Monitor continues to reveal challenges Barcelona faces as a city that aspires to become a global magnet for talent: we are still far from being efficient with bureaucratic procedures, with taxes, and especially with how foreign talent enters and is welcomed and introduced to the city. Our commitment is present, however, and our actions as Barcelona Global will keep us moving in the right direction.

This second Barcelona Global International Talent Monitor would not be a reality without the support of many of our members who committed time, resources, contacts, and talent to make it happen. We also owe a special thank you to the work done by our Steering Committee, methodological partner, Instituto DYM, Scientific Director, Dr. Francisco J. Granados, and to the extraordinary commitment of its director, Carine Lebecque.

Gonzalo Rodés

Cum

Vice President of Barcelona Global International Talent Monitor Co-chair

Introduction

Barcelona Global is a private, non-profit organization made up of professionals and companies whose mission is to make Barcelona one of the best cities in the world to attract talent and develop economic activity.

The objective of the International Talent Monitor initiative is to better know the needs and perceptions of international professionals living and working in Barcelona in order to improve their sense of belonging and involvement here in Barcelona.

The target of the survey is the talented internationals living and working in Barcelona, who are categorized as follows: CEOs and business executives, principal investigators of R&D centres, top level investors and entrepreneurs, creative minds, artists, and athletes.

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

The first edition was initiated in 2013 by Gonzalo Rodés, Barcelona Global Vice President, with the support of Francisco J. Granados and Ludovica Maglione. Now in 2015, this is the second edition with a plan to relaunch it every 2 years.

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

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

Methodology

Barcelona Global's International Talent Monitor 2015 is chaired by Gonzalo Rodés and coordinated by Carine Lebecque and Mateu Hernández (Barcelona Global) with the support of Adriana Sala (Universitat Pompeu Fabra), Jack Rickles (Cornell University, New York), and Victoria Saenz (Stanford University, California). Banco Sabadell has sponsored Barcelona Global to develop this second edition.

It has been conducted under the scientific direction of Dr. Francisco J. Granados (Institut Barcelona d'Estudis Internacionals), with the methodological and technical support of Instituto DYM.

The project has been supervised by a Steering Committee of 20 international experts who validated the main steps of the project (design phase, validation of survey, review of results).

The 2015 version of the survey has been designed with the commitment of 26 professionals during 5 focus group sessions in which the 2013 survey was reviewed, removing questions and adding new ones when necessary with the goal of making it shorter (30-minute survey) and more accurate to 2015 issues. The 2015 survey is composed of 284 questions.

Many questions asked to rate satisfaction, importance, helpfulness, etc. using the following scale of 7 possible value options. Each question specify the type of rating to do.

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).

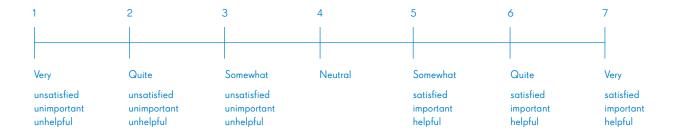
Below is the scale of rating:

When available, 2015 figures are compared to 2013 figures.

Fifty international organizations (companies, public institutions, research centres, trade agencies, foreign chambers of commerce, associations, and schools) have been involved in the distribution of the survey as well as 15 individuals who have sent it to their international contacts. The project was presented to them on March 26 at the Universitat Internacional de Catalunya.

The survey was distributed to 7,000 potential respondents and achieved 678 respondents, a bit more than double the number from 2013 (326 respondents).

Respondents answered the survey between April 29 and June 3, 2015. An online system designed by Instituto DYM allowed completion of the survey while fully warranting the anonymity of respondents' participation and their responses.



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Executive summary

According to the 678 respondents of the survey, Barcelona has the attributes to become a global city. However, the Barcelona Global International Talent Monitor, done with the technical and methodological support of Instituto DYM, shows that to become a magnet for international talent, Barcelona needs major reforms in areas such as taxation, business friendliness, welcoming internationals, and use of English.

1. Great potential to be a global city

International residents positively assess with infrastructure of international connectivity (6.0 out of 7), lifestyle in Barcelona (with living conditions rating of 5.9 out of 7), quality and quantity of public spaces (5.4 out of 7), quality of their children's schools (5.5 out of 7), quality of universities and of scientific research centers (5.1 out of 7), safety (5.0 out of 7), and services like public healthcare (4.7 out of 7). When asked if they would recommend other internationals to move to Barcelona for work, they would guite recommend it (5.2 out of 7) and they rated Barcelona 5.3 out of 7 as a global city.

2. Need to facilitate business and investment

This second edition of the International Talent Monitor saw an improvement in the perception of ease of doing business in the city, with an average 17% increase since 2013 with regards to the ratings in managing a business, starting up a business and investing.

However, decisive actions are needed in the following key areas which have received the lowest satisfaction ratings from survey respondents: access to financing (available credit from local and private financial institutions 2.8 out of 7), taxation (corporate taxation was rated 3.3 out of 7), bureaucracy (provision of license and activity permits rating was 3.4 out of 7) and assistance for entrepreneurs (3.6 out of 7).

With neutral in the rating scale being 4 out of 7, the ease of managing a business is rated above mid-point at 4.4 out of 7, but the ease of investing and the ease of starting up a business are both rated below neutral at 3.8 out of 7 and 3.7 out of 7, respectively. The overall satisfaction of running a business and overall satisfaction of starting up a business in Barcelona are rated 4.6 and 4.3 respectively. All these indicators have all improved since 2013 though.

3. A better welcome for international talent

The welcoming and landing for newcomers to Barcelona can be improved: survey respondents cited a lack of clear information and overly-bureaucratic administrative processes as their main challenges upon arrival.

Apart from their network of friends and acquaintances, none of the public and private institutions are perceived as useful during their initial months in the city. They were all rated between 2.2 to 2.7 out of 7.

4. Tax and wages matter when attracting talent

Although working conditions in Barcelona offer a guite satisfactory work/life balance (rated 5.3 out of 7), low wages (competitive salary rated 3.0 out of 7) combined with unfavorable tax treatment (3.4 out of 7), have been identified as some of the main issues that are preventing Barcelona from attracting more international talent.

5. Improving English-speaking skills

According to respondents, Barcelona remains a city with insufficient English proficiency in business environment and public and private services.

Workforce proficiency in English was rated 3.1 out of 7, that of public officials 2.3 out of 7, and the availability of public information in English 2.9 out of 7.

Survey respondents also stressed English as a relevant factor in the education of their children, rating it 5.4 out of 7. Public and concertada school systems do not seem to fulfill the priority internationals residents give to educating their children in English.

6. Satisfaction with the services offered in Barcelona

The provision of services offered by the city is quite satisfying for international talent, especially when it comes to security, health, education, and culture.

The majority of respondents send their children to an international school in Barcelona (53.5%). Respondents rate 5.5 out of 7 the quality of education in the schools they send their children. Healthcare systems and safety are also rated well, both with an average score of 5 out 7.

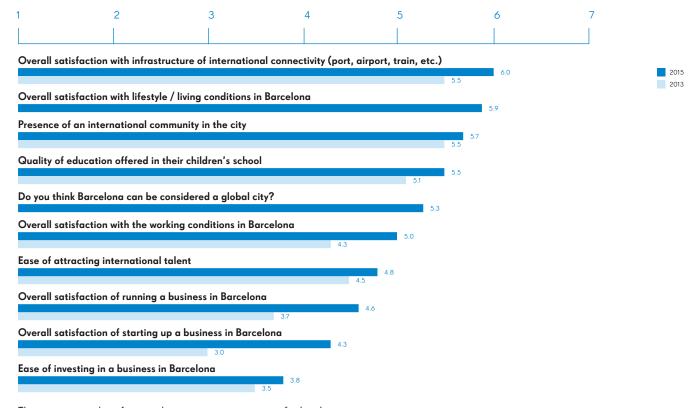
Public spaces, art performances, cultural attractions, and gastronomy all obtained high scores between 5.1 and 6.2 out of 7.

Call to action

- 1. A competitive taxation to attract investment and talent
- 2. A support program to welcome international talent
- 3. English to be declared an official language in Barcelona
- 4. A school system open to internationals and adapted to their need to have access to an education in English for their children

Global indicators

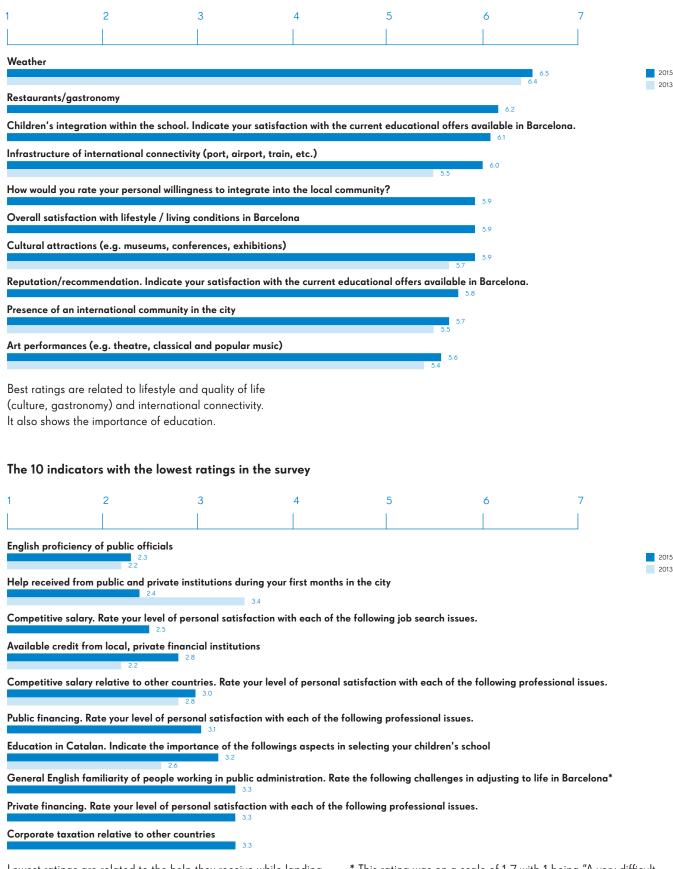
The 10 most strategic indicators identified by our Steering Committee



The international professional community is quite satisfied with the city's international connectivity and lifestyle/quality of life. It is between somewhat and quite satisfied with the quality of education of their children's schools and close to somewhat satisfied with running and starting up a business. It is somewhat unsatisfied with investing though. The ratings of all these indicators have improved since 2013.

Top/Bottom indicators

The 10 indicators with the highest ratings in the survey

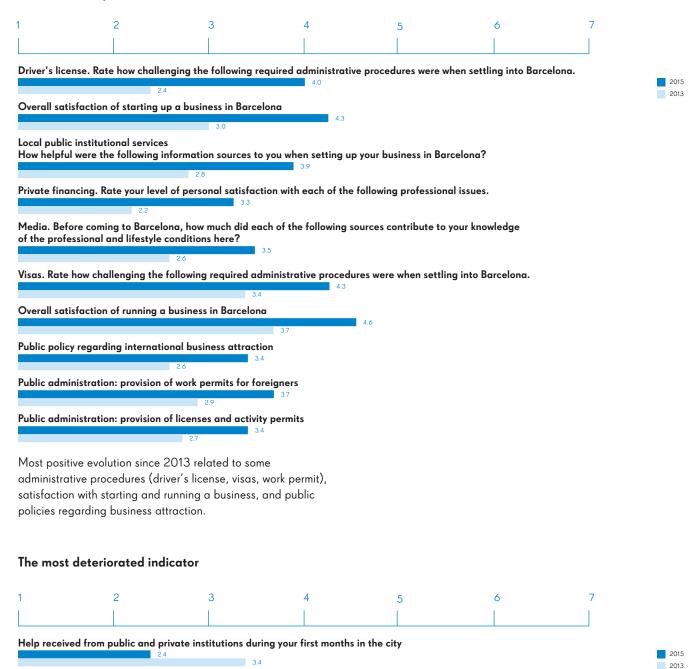


Lowest ratings are related to the help they receive while landing in Barcelona, the English proficiency of local and public officials, the competitiveness of salaries, and the credit available (public and private).

^{*} This rating was on a scale of 1-7 with 1 being "A very difficult challenge" and 7 being "Not at all a challenge".

2013 - 2015 Trends

The 10 most improved indicators

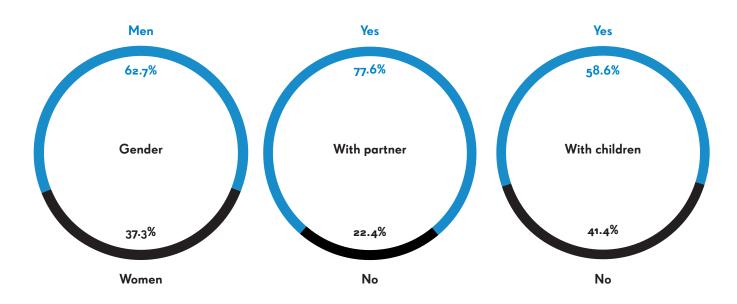


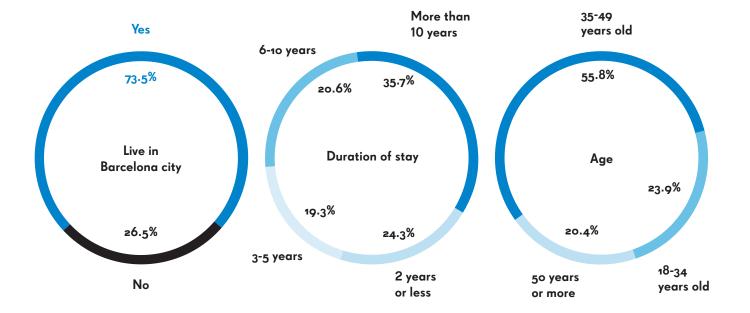
Most negative evolution since 2013 related essentially to the help they receive while landing from public and private institutions.

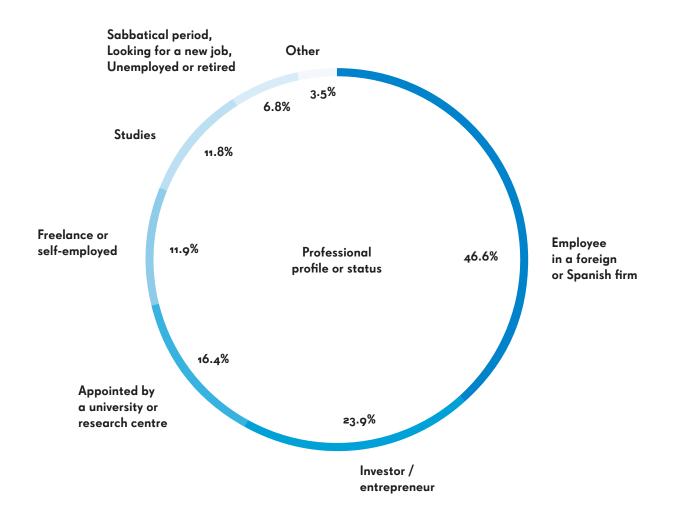
Respondents' profile overview

Top 5 nationalities



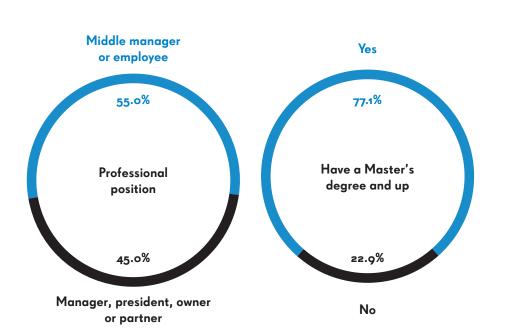






Top languages spoken

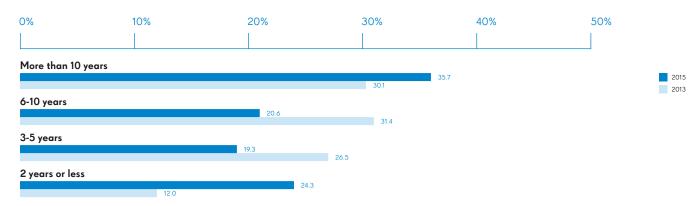




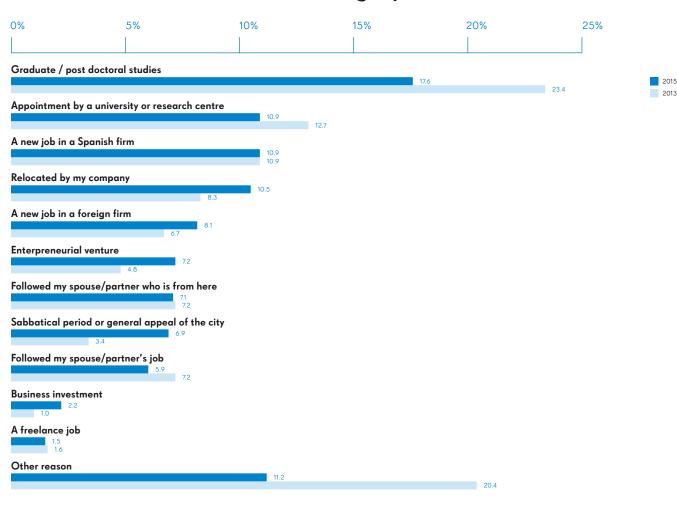
Results by section | 1. Reason to Come

The main reasons that internationals come to Barcelona are a job in a Spanish or foreign firm (19.0%), studies (17.6%), work with a job in a research center or university (10.9%), and an entrepreneurial venture (7,2 %). A third are long-term residents (+10 years) and a quarter are newcomers (-2 years). Lifestyle and business opportunity are equally important in the decision to come. The main drawbacks are salaries, job market, cost of living, and bureaucracy. People who knew Barcelona and a previous visit contributed most to their knowledge of Barcelona.

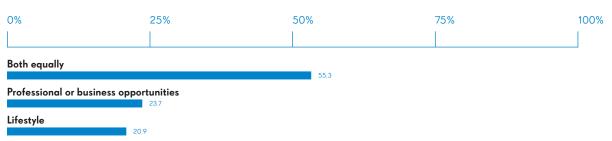
1.1 How long have you been living in Barcelona?



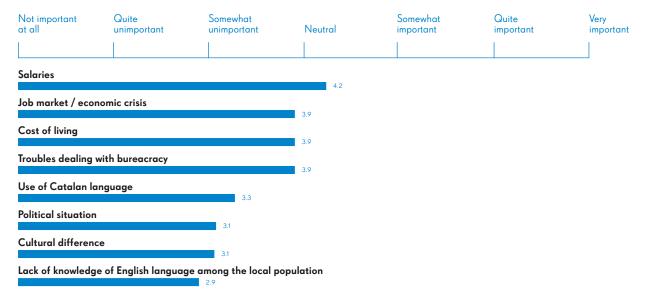
1.2 What is the main reason that brought you to Barcelona?



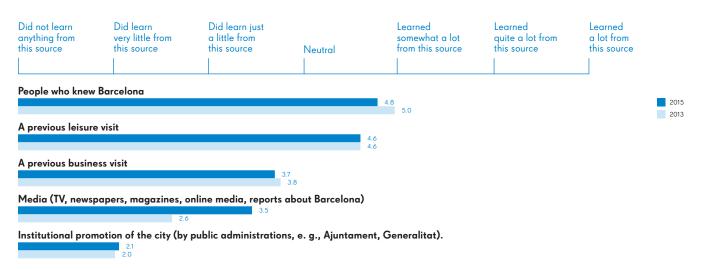
1.3 Which aspect most affects your decision regarding where to locate?



1.4 Rate how important the following drawbacks were when you were deciding to come to Barcelona.



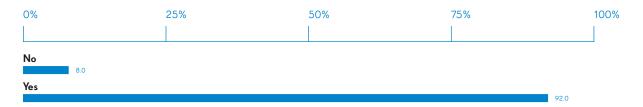
1.5 Before coming to Barcelona, how much did each of the following sources contribute to your knowledge of the professional and lifestyle conditions here?



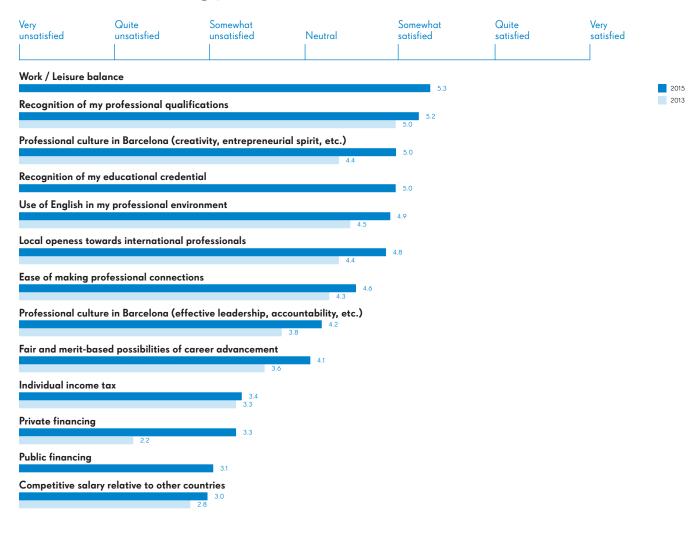
2. Working Conditions

92.0% of respondents are working. Internationals are most satisfied with work/leisure balance, recognition of professional and educational qualifications, and professional culture. They are least satisfied with competitiveness of salary, public and private financing, and individual income tax. They are somewhat satisfied with the overall working conditions.

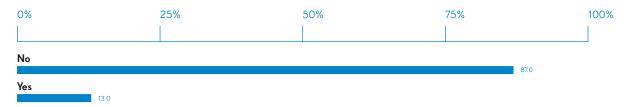
2.1 Are you working or have you been working in Barcelona or the Barcelona area?



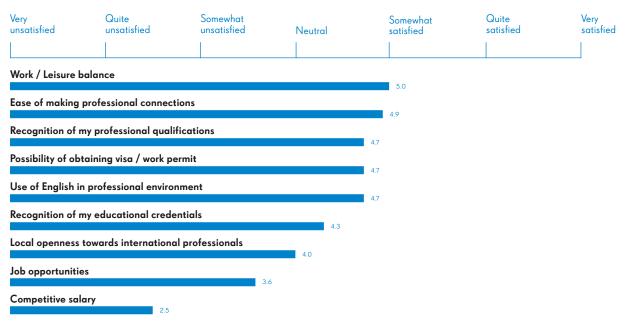
2.2 Rate your level of personal satisfaction with each of the following professional issues.



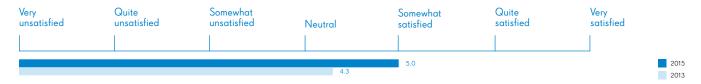
2.3 Are you currently looking for a job in Barcelona (only for those who are not working)?



2.4 Rate your level of personal satisfaction with each of the following professional issues (only for those who are looking for a job).



2.5 What is your overall satisfaction with the working conditions in Barcelona?



3. Doing Business

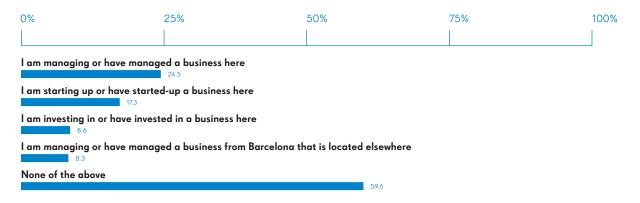
24.5% of respondents manage a business, 17.3 % are starting a business and 8.6 % are investing. The rest are an employee. Although higher than in 2013, the respondents are quite neutral in their rating of the ease of doing business. The highest rating being managing a business, then starting and the lowest being for investing. The overall satisfaction of running a business and starting up a business was neutral.

The highest ratings were for international connectivity, talent attractiveness, quality of universities and research centers, and labor cost. Ratings were lower concerning English proficiency of public officials and local workforce, corporate taxation, available credit, and availability of public information in English.

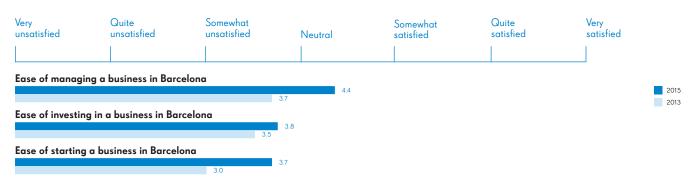
When setting up a business, there was a noted lack of information from public institutions.

Foreign markets, especially European, are the most important market for respondents' businesses.

3.1 Are you currently investing, starting up, or managing a business in Barcelona, or have you ever done so?

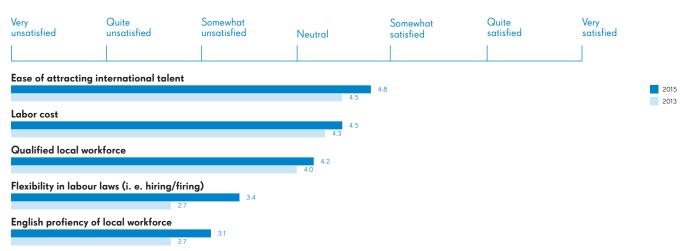


3.2 Rate your level of satisfaction with each of the following aspects.

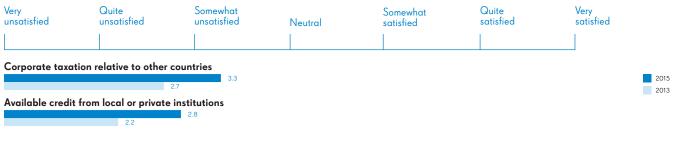


3.3 Rate your level of satisfaction with each of the following aspects.

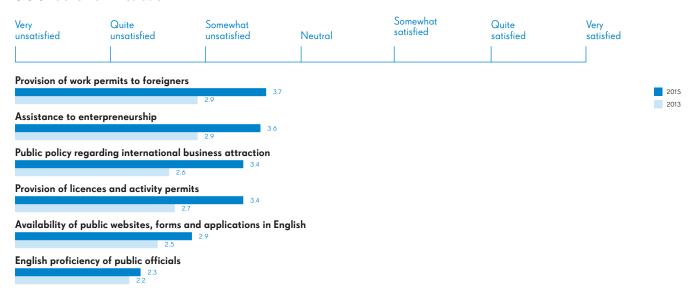
3.3.1 Workforce



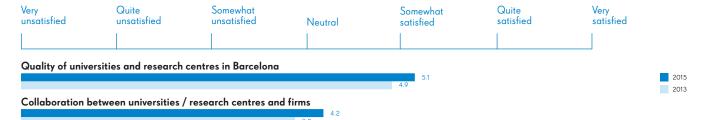
3.3.2 Tax & Finance



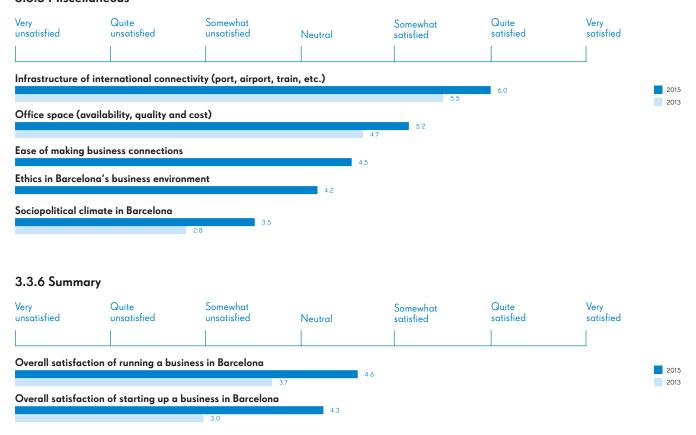
3.3.3 Public Administration



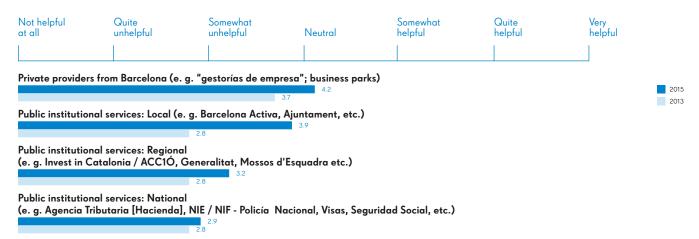
3.3.4 Research Centres



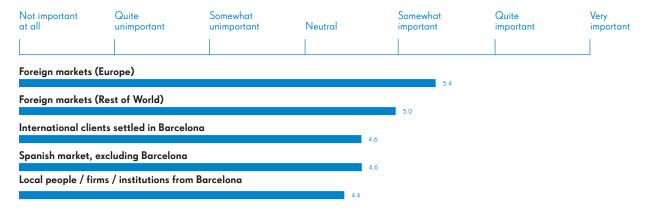
3.3.5 Miscellaneous



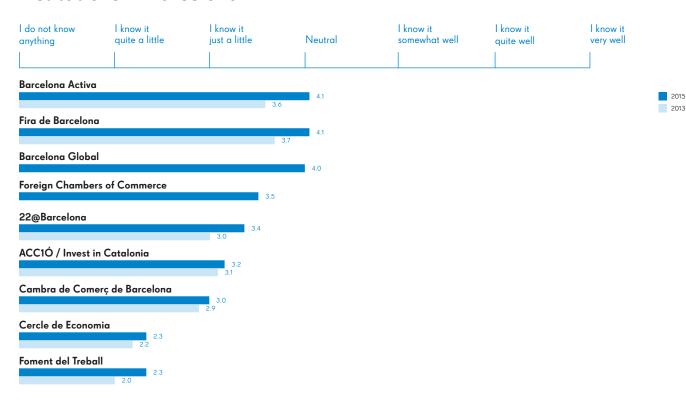
3.4 How helpful were the following information sources to you when setting up your business in Barcelona?



3.5 Rate the importance of each of the following geographics markets for your business.



3.6 How much do you know about the following institutions in Barcelona?



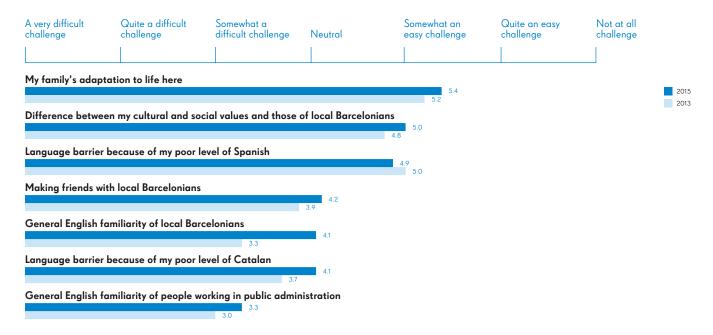
4. Social Integration

The most difficult challenge in adjusting to life in Barcelona is the lack of English familiarity of people in public administration. Satisfaction has improved during the past two years concerning administrative procedures. The family's adaptation to local life is not a challenge.

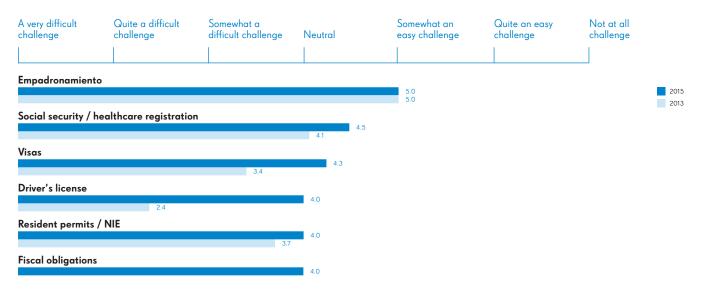
Respondents interact both with expatriates and local people. They feel a part of the local community and are very willing to integrate. The most helpful tool for social integration during their initial months in Barcelona was the network of friends, and the least helpful were public and private institutions.

The importance of Catalan in Barcelona isn't a relevant challenge for the majority of respondents; it even enriched the experience for 22%.

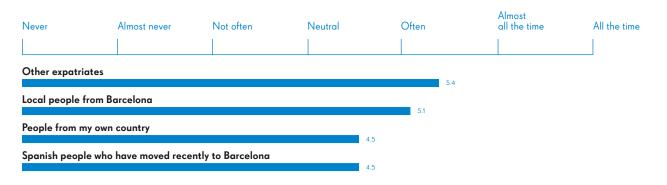
4.1 Rate the following challenges in adjusting to life in Barcelona.



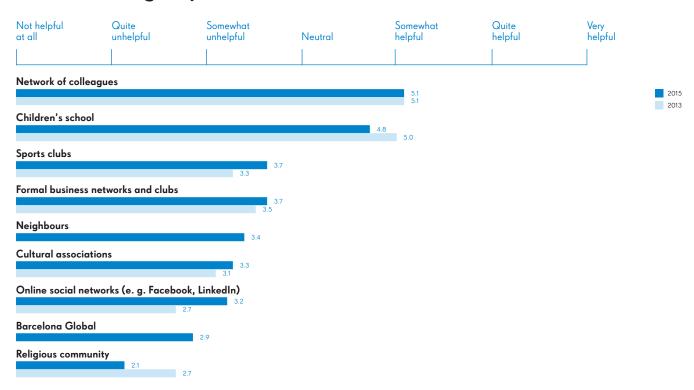
4.2 Rate how challenging the following required administrative procedures were when settling in Barcelona



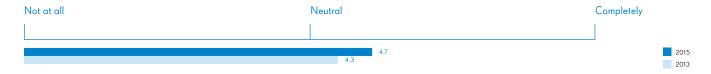
4.3 Which communities do you interact with in Barcelona?



4.4 How helpful have the following social groups been in making acquaintances?



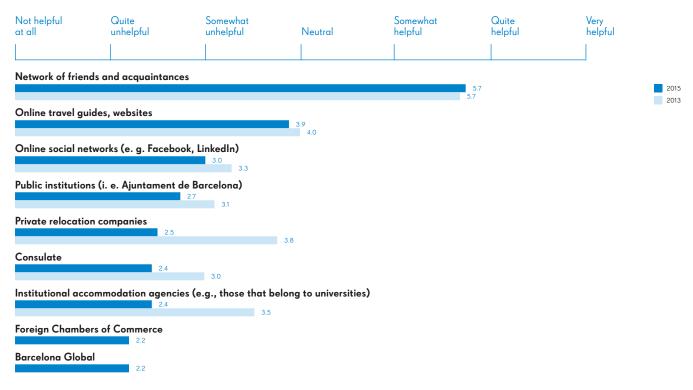
4.5 Do you feel you are part of Barcelona's local community?



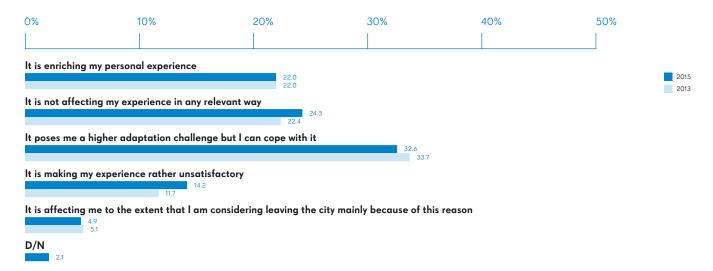
4.6 How would you rate your personal willingness to integrate into the local community?



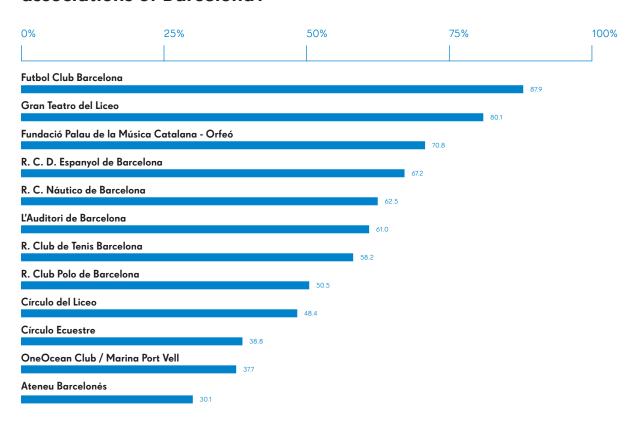
4.7 How helpful were the following sources of information during your initial months in the city?



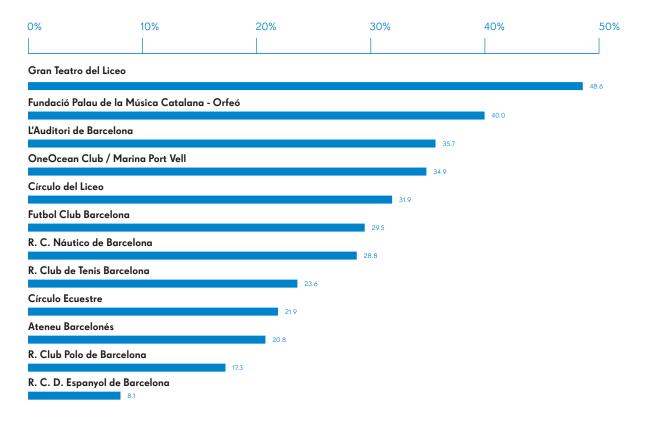
4.8 How is the importance of Catalan language affecting your experience here?



4.9 Do you know about the following leisure associations of Barcelona?



4.10 And would you be interested in participating/ becoming a member?



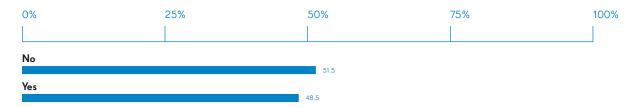
5. Education

48.5% have children under 18 years old attending school. Respondents are close to quite satisfied with their children's quality of education and quite satisfied with their integration in it. 53,5% of their children attend an international school, 20% a public school, 18.5% a Concertada, and 12.2% a private non-international school. The quality of education is the most important criteria when selecting a school as well as education in English.

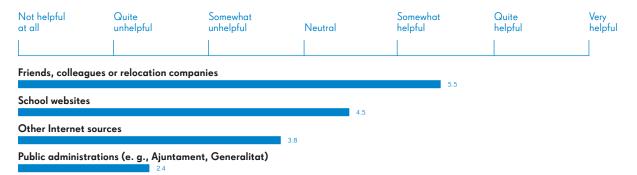
Friends, colleagues, or relocation companies are the most helpful sources of information regarding school; the least helpful is the public administration.

Only 3.4% of respondents have children attending university in Barcelona.

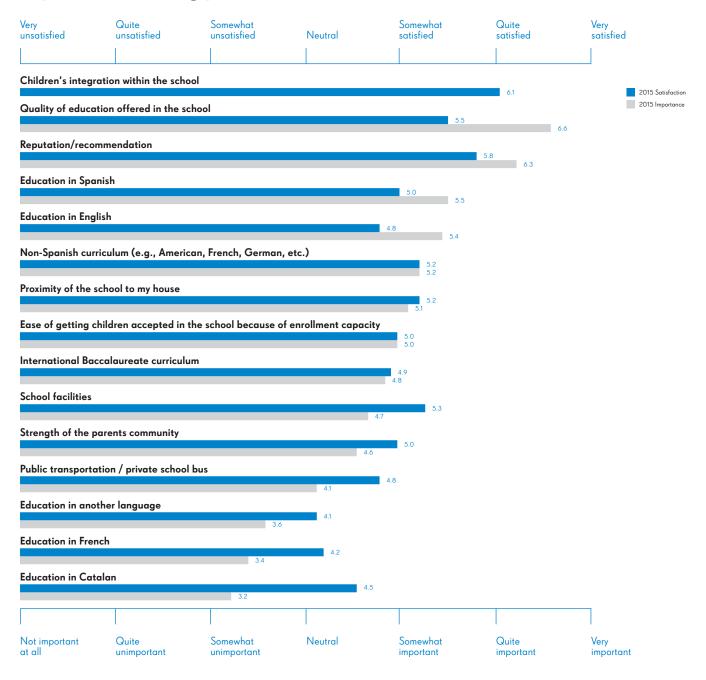
5.1 Do you have children under 18 years of age attending school?



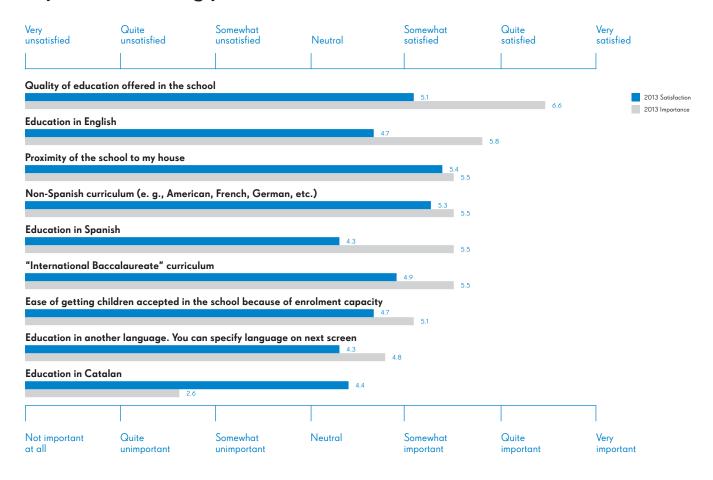
5.2 How helpful were the following information sources regarding schools?



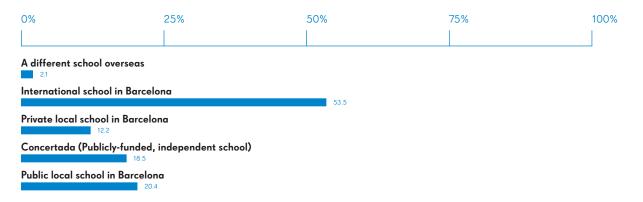
5.3-5.4 Indicate the satisfaction/importance of the following aspects in selecting your children's school. 2015



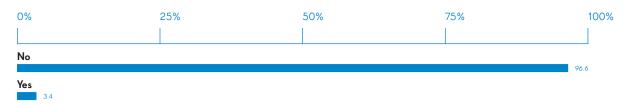
5.3-5.4 Indicate the satisfaction/importance of the following aspects in selecting your children's school. 2013



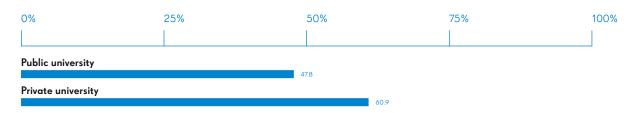
5.5 Which school are your children attending while you are in Barcelona?



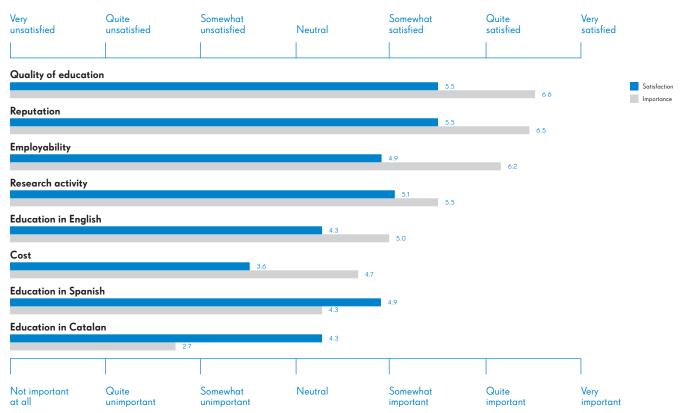
5.6 Do you have children attending university in Barcelona?



5.7 Which university are your children attending while you are in Barcelona?



5.8-5.9 Indicate the satisfaction/importance of the following aspects in selecting your children's university? 2015

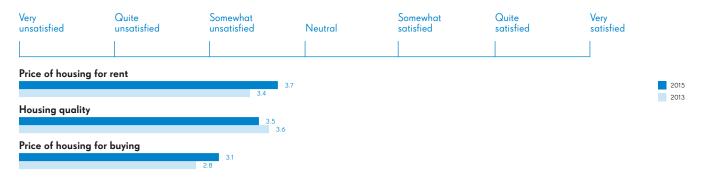


6. Living Conditions

Respondents positively assess the quality of life in Barcelona, especially its weather, gastronomy, and cultural attractions. Private and public healthcare are also positively evaluated. Overall, respondents are quite satisfied with the living conditions.

They negatively assess housing (price and quality).

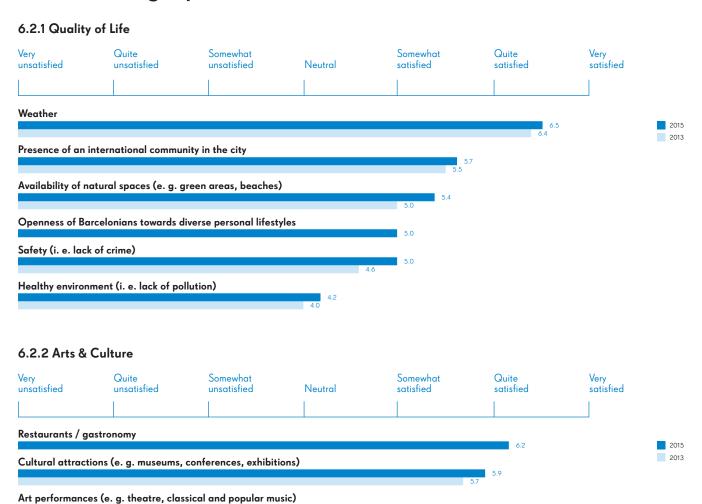
6.1 Indicate your level of satisfaction with each of the following aspects of housing in Barcelona.



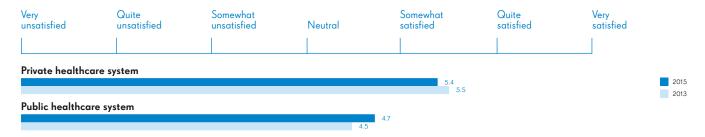
6.2 Indicate your level of satisfaction with each of the following aspects of Barcelona.

Quality and quantity of public spaces per neighbourhood (e. g. library)

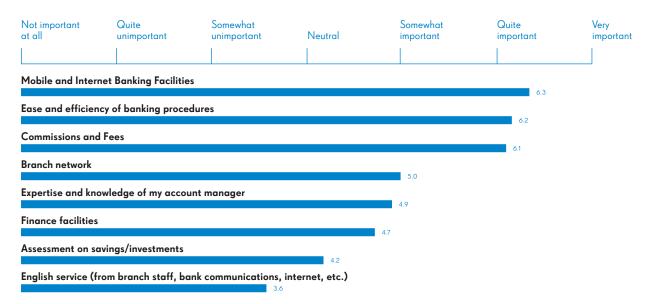
Urban planning of public spaces (i.e. street amenities such as playgrounds, parks)



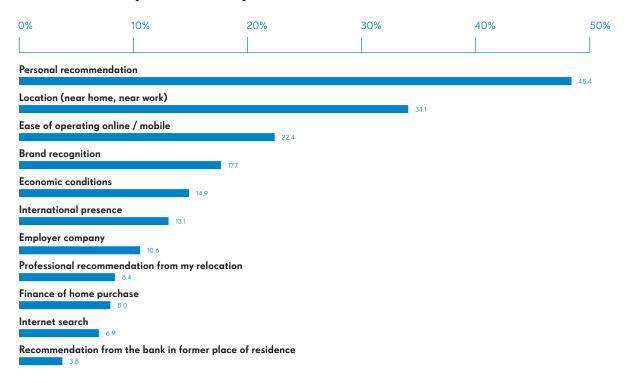
6.2.3 Healthcare system



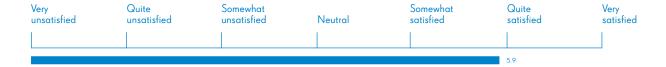
6.4 How important are the following attributes to you when choosing a bank?



6.5 How did you choose your bank in Barcelona?



6.6 Overall satisfaction with lifestyle/living conditions in Barcelona



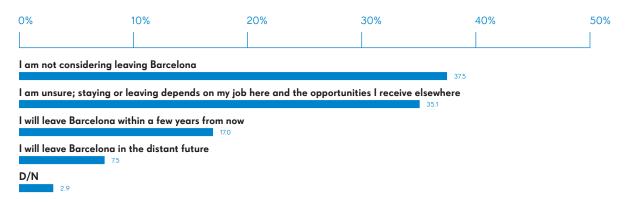
7. General Perception

37.5% of respondents are not considering leaving Barcelona. The main reason for leaving would be a new job opportunity or transfer elsewhere (70.5%).

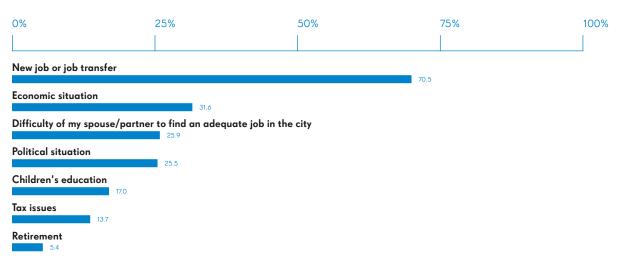
Respondents are optimistic regarding the evolution in the upcoming 2 years and have perceived a positive evolution since 2013. There are concerns regarding taxation and political situation, but they are very positive about international connectivity and quality of life.

41% identify Barcelona as the best city to live and would recommend moving to Barcelona. They also consider Barcelona to be a global city.

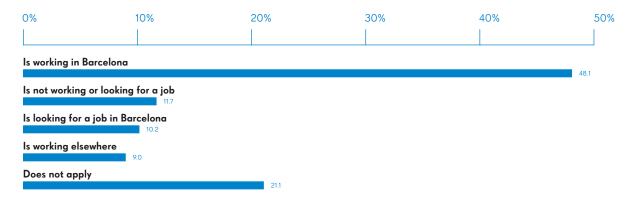
7.1 What are your plans for leaving Barcelona?



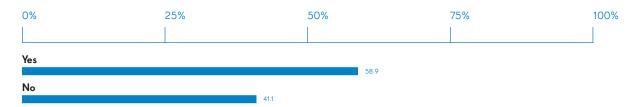
7.2 What would be the reason for leaving?



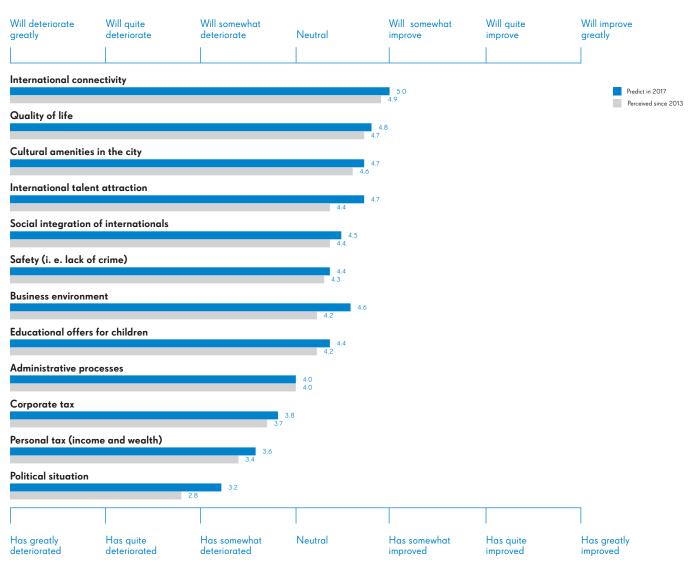
7.3.1 What is the employment situation of your spouse/partner?



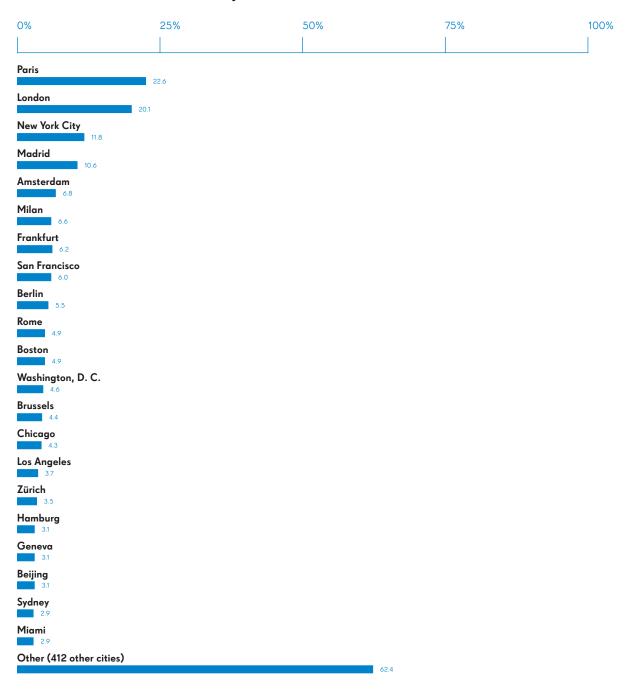
7.3.2 Could the difficulty of your spouse/partner finding an adequate job in Barcelona be a reason for you to leave the city?



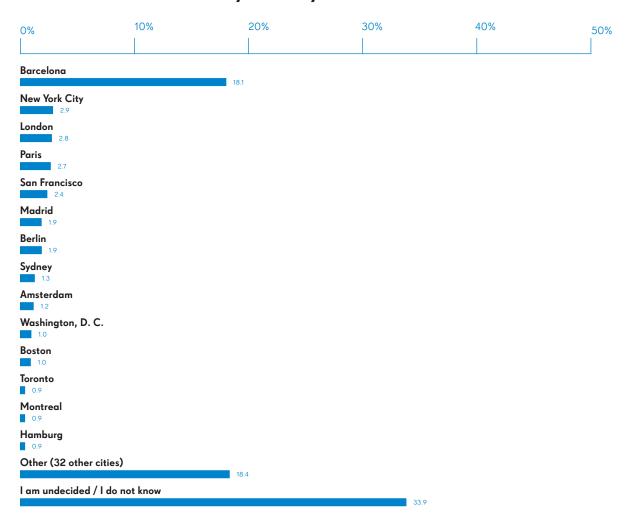
7.4 - 7.5 How do you predict/perceive the evolution of Barcelona for the upcoming 2 years/since 2013?



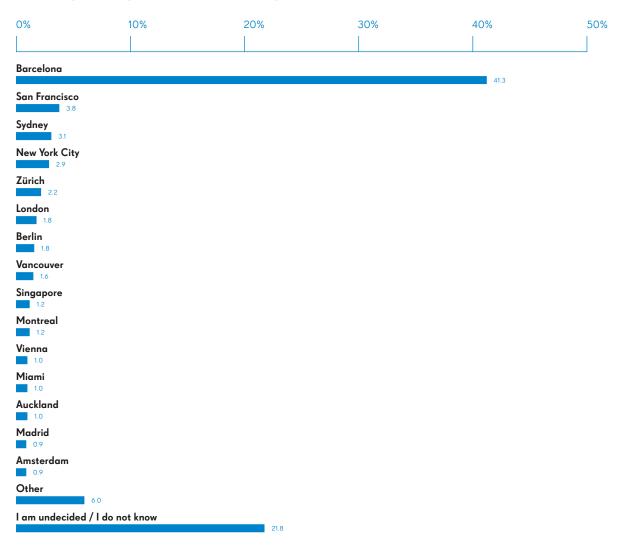
7.6 In which cities have you lived before?



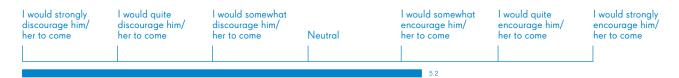
7.7 Which is the best city where you have lived?



7.8 In your opinion, which city is the best to live in?



7.9 Would you recommend a foreign professional to move to Barcelona for work?



7.10 Do you think Barcelona can be considered a global city?



Respondents' profile details

Nationality 28% America By continent 84% Europe 4% Africa 6% Asia 2% Oceania 0% 5% 10% 15% 20% 25% France Germany **United States** Italy United Kingdom Spain (multinationals) Austria Netherlands Argentina Canada Portugal Albania India Russia Brazil Bangladesh Switzerland

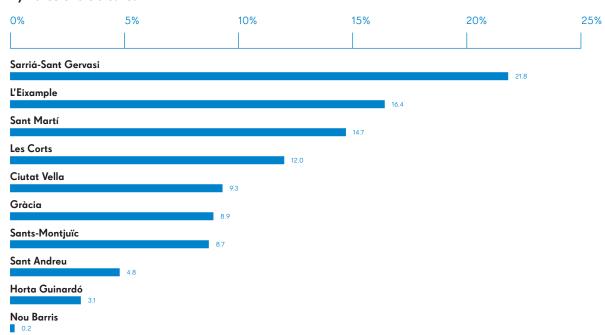
There are 78 different nationalities with multiple nationalities possible

Mexico Belgium

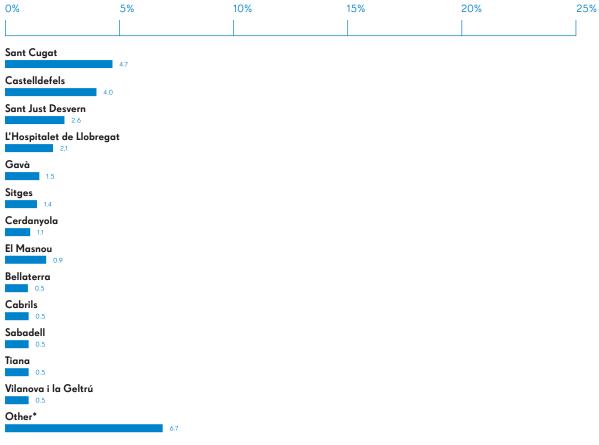
Where do respondents live?



By Barcelona's district

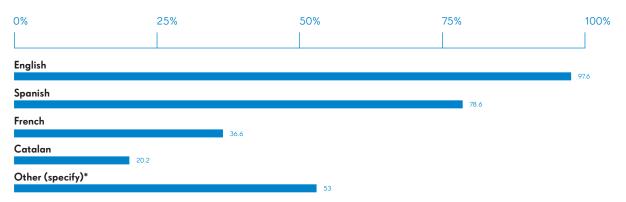


By city other than Barcelona



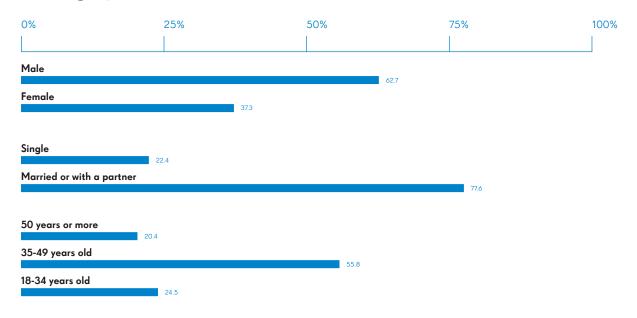
* Badalona, Begues, Cubelles, Gelida, L'Ametlla del Vallès, Premià de Dalt, Sant Pere de Ribes, Bigues i Riells (0,3% each one); Cabrera de Mar, Calella, Canovelles, Cervelló, Collbató, El Papiol, La Garriga, Les Roquetes, Mataró, Olivella, Premià de Mar, Sant Esteve Sesrovires, Sant Fruitós de Bages, Sant Quirze del Vallès, Sant Vincenç de Montalt, Vallirana, Viladecans, Vilafranca del Penedès, Sant Joan Despí, Molins de Rei (0,2% each one).

Languages spoken

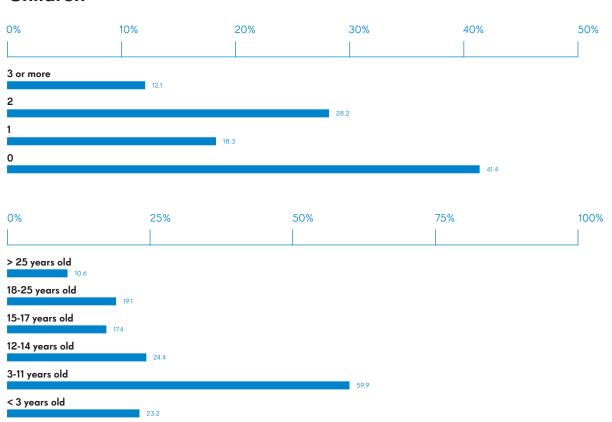


* 37 other languages spoken

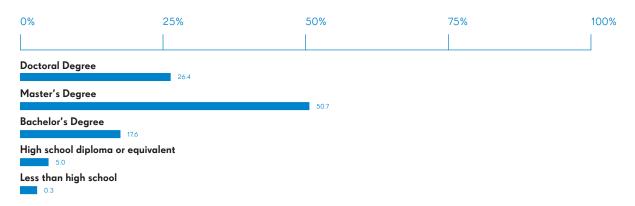
Demographics



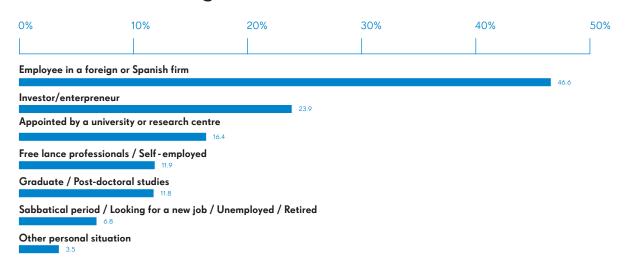
Children



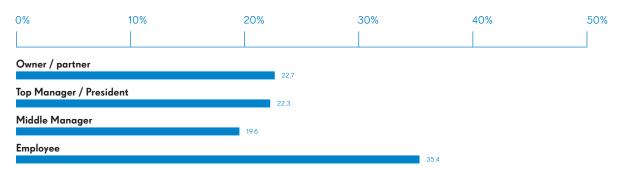
Highest educational degree



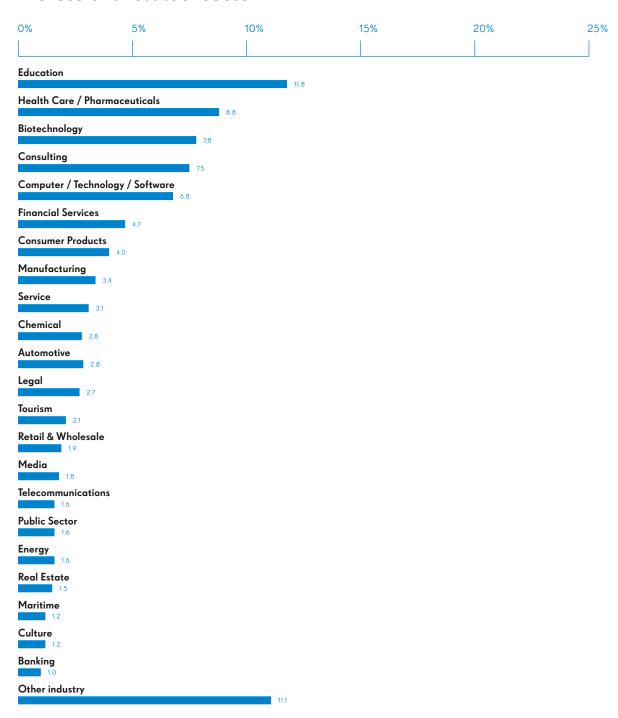
Professional status: general



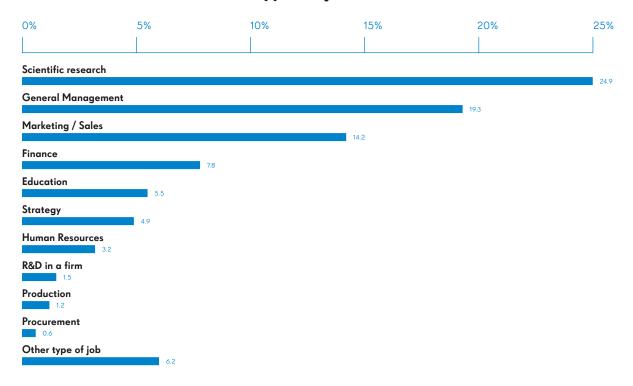
Professional status: position



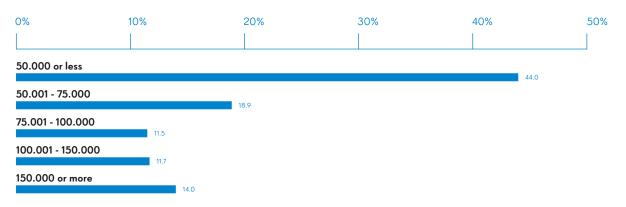
Professional status: sector



Professional status: main type of job



Salary



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Philippe Saman Director French Chamber of Commerce in Barcelona



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Lluís Torrens Manager Public-Private Sector Research Center IESE Business School until summer 2015



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Our academic partner for the scientific direction is Francisco J. Granados, Researcher of the Institut Barcelona d'Estudis Internacionals (IBEI).

And all our partners who helped us send out the survey:

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CMRB: Centre de Medicina Regenerativa de Barcelona

CREAL: Centre de Recerca en Epidemiologia Ambiental

CRG: Centre Regulació Genòmica

Fundació Pasqual Maragall

IBEC: Institute for Bioengineering of Catalonia

IBE: Institut de Biologia Evolutiva

ICN2: Catalan Institute of Nanoscience and Nanotechnology

ICREA Institució Catalana de Recerca i Estudis Avançats

IMIM: Institut Hospital del Mar d'Investigacions Mèdiques

IRB: Institute for Research in Riomedicine

PRBB: Barcelona Biomedical Research Park

Trade Associations / **Chambers of Commerce**

British Chamber of Commerce in Spain

Cámara de Comercio Alemana para España

Cámara de Comercio Francesa de Barcelona

Netherlands Business Support Office

Schools

Barcelona Graduate School of Economics

Benjamin Franklin International School

Deutsche Schule Barcelona

ESADE Business School

IESE Business School

Lycée français de Gavà Bon Soleil

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