

2023 Barcelona Global

# International Talent Monitor<sup>®</sup>

A project by



Barcelona  
Global

With the support of

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## Forewords



**Xavier Comerma Carbonell**  
Deputy General Manager of Banco Sabadell  
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### The City's attraction to international talent

Barcelona has earned a reputation as a cosmopolitan city and has become the best city in southern Europe on which to live and work. The city's ongoing commitment to talent is bearing fruit and, with the help of organizations such as Barcelona Global, has positioned the city as one of the most important centres for attracting international talent.

The city is a benchmark for economic dynamism, innovation, cultural and linguistic diversity, strategic geographical location and exceptional quality of life. It has also strengthened its role as a technology and business hub for start-ups and entrepreneurs, as one of the most important hubs in Europe for the start-up ecosystem, which has allowed it to develop an admirable network of contacts, to exchange ideas and meet leaders and experts from different sectors. However, with the aim of continuous improvement, it is very important to know and understand well what the key elements are in order to continue to facilitate this enriching and conducive context for those wishing to develop their careers in an international environment.

Banco Sabadell has always had an entrepreneurial DNA and a recognized international vocation, and it is our desire to continue to open doors and improve the foundations to maintain Barcelona's reputation as a magnet for international talent. To achieve this, we have once again joined the Barcelona Global initiative, which surveys the opinions and perceptions of the city's international professional community

every two years. This is a key project to understand and know our strengths and weaknesses in relation to the needs of foreign residents from a comprehensive perspective: working conditions, living conditions and social integration, among others.

The importance of this group to Banco Sabadell is fully reflected in the Barcelona Welcome Hub, an exclusive office for international clients located in the city centre at 456 Avenida Diagonal. A pioneer in the Spanish banking system, this hub has a team of specialized professionals who, in up to ten different languages, are expert in advising and assisting expatriate clients or investors moving to live or work in Barcelona, in both financial and tax matters, as well as any legal aspects they may require.

It is therefore an honour to once again participate in this initiative to take advantage of opportunities for the future and help the city move forward in the areas of improvement highlighted in the sixth edition of the International Talent Monitor. The aim is to maintain and further promote Barcelona as a metropolis where the professional and business dreams of the world's top talents can come true.



**Maite Barrera Xaubet**  
President of  
Barcelona Global

## Barcelona, a magnet for impactful talent

Barcelona is a cosmopolitan, dynamic, and highly competitive city. A pioneer in digital technology, it is exceptionally well-connected, and it is known throughout the world for its robust start-up ecosystem. Moreover, the city's open, courageous, and ambitious approach makes it a magnet for impactful talent.

Barcelona has reasserted its standing in the world during the two years since the last International Talent Monitor, with foreign professionals in Barcelona continuing to be highly positive about the city. The data from this year's survey demonstrates their optimism, especially with regard to the city's capacity to attract investment and business.

Furthermore, Barcelona has a unique energy that comes from a committed, entrepreneurial civil society that is keen to collaborate and to create public-private partnerships. This makes Barcelona particularly business-friendly and keen to welcome international talent with open arms.

Nevertheless, we have to continue working to make Barcelona one of the best cities in the world for impactful talent. And this means not just for any kind of talent, but professionals who are creative, entrepreneurial, and engaged in research, people who also seek to make a positive impact on society and are keen for Barcelona to play its part in creating a more prosperous, sustainable and inclusive world.

This is why it is more necessary than ever to keep moving forward. We need to act in areas that are making it difficult to attract and retain impactful talent. Despite the major advances made by Barcelona Global in promoting the new startup law – an essential measure to help us compete for talent against other European cities – we still need to make progress in a number of areas: access to affordable housing, reasonably-priced international schools, the streamlining of bureaucratic procedures, competitive salaries, and tax incentives.

One of the major challenges commented on by international professionals in the report is the need for the city to position itself as a leader in sustainable practices, in particular by decarbonizing and improving air quality. These are measures to protect the environment that may also have a positive impact on tourism.

Barcelona is one of the best cities in the world to live and work in. It may still have challenges to face, but there are also great opportunities. Now it is more important than ever to take advantage of these opportunities in order to make things happen.

I would like to thank Banco Sabadell for its support in making this year's International Talent Monitor possible, to Professor Sebastian Reiche for his valuable contribution as scientific advisor and to all the international talent that has answered the monitor.

## Introduction

# Barcelona Global is an independent and non-profit organization founded in 2012

The organization boasts more than 240 of the city's leading companies, entrepreneurs, as well as cultural institutions and universities as its members. With more than 960 professionals Barcelona Global has a powerful voice to fulfil its mission – **making Barcelona one of the best cities in the world for impactful talent and economic activity.**

We believe Barcelona has all the ingredients to become a global reference for public-private collaboration, creating a unique ecosystem to nurture responsible and sustainable economic activity.

We are advocates for a city that integrates entrepreneurship and innovation, academic excellence, culture and responsible, sustainable tourism.

More than 160 of our individual members belong to the International Council, the network of barcelonians living and working abroad. And 16% of the members are talented people who have chosen Barcelona as their “home”.

We believe that global talent – Barcelonians-by-Choice – will make the city a richer, economically vibrant place if we are able to merge their initiative with the Barcelonians by birth initiative, creativity and entrepreneurial spirit.

The Barcelona Global International Talent Monitor has been going since 2013 bi-annually and aims to provide a comprehensive view on working conditions, entrepreneurial environment, integration and overall sentiment towards Barcelona amongst talented internationals who live in Barcelona by choice. This includes professionals, entrepreneurs, academic researchers, investors, athletes and artists.

Since its inception, the International Talent Monitor has been a crucial instrument to “feel the pulse” of internationals living and working in the city, allowing us to identify areas which can make Barcelona even more attractive as a global business hub.

To this end Barcelona Global will continue to be the voice of internationals and based on the survey results will continue to lobby for change and evolution – to make Barcelona one of the best cities in the world to work and live.

## Methodology

**The 2023 edition of the International Talent Monitor is the 6<sup>th</sup> of its kind.**

**As in previous years, the project employs a robust methodology, overseen by an advisory panel of 15 experts and the support of Sebastian Reiche, Professor at IESE Business School.**

### Quantitative

In essence, as shown below, the survey offers respondents the option to rate questions on a sliding scale from 1 (negative) to 7 (positive), indicating a corresponding numerical value.

Questions also included the option to indicate "I don't know/I don't have an opinion or "This question does not apply to my personal circumstances".

In total 1008 respondents participated in the 2023 survey, spending an average of 17 minutes on the completion of the survey – indicating a high level of engagement.

The quantitative survey was widely distributed within the international community through a network of influential 'multipliers' among businesses, trade organizations, universities, international schools, museums, sports organizations, etc.

### Qualitative

8 focus group were conducted, focusing on qualitative input from a range of international professionals.

The focus groups were divided into the following themes: City Services & Housing, Education, Health & Pharma, Investment, Mobility, Infrastructure & Sustainability, Research & Innovation, Startup & Tech, Tourism, Culture & Sports,

The total number of professionals involved was 60.

A thorough and deep analysis of the quantitative results was conducted, which was enriched by feedback and ideas from the qualitative focus group insights.

We are grateful to Banco Sabadell for the active collaboration and sponsorship in making this survey another important tool to make life better for internationals in Barcelona.

Emerging themes and ideas were discussed and vetted by the Advisory Board under the guidance of the Scientific Director Professor Sebastian Reiche, Professor and Head of the Managing People in Organizations department (IESE Business School) and the director of the International Talent Monitor, Fanny Magini.

This year, exceptionally, we analite and compare data from 2023 with data from 2019, as 2021 was marked by the Covid pandemic. The COVID-19 pandemic introduced several unprecented and extraordinary factors that affected various areas, such as economic activity, healthcare utilization, social behaviors, and more. Thus, 2019 provides a pre-pandemic baseline that represents the 'normal' conditions without the influence of COVID-19. Comparing data from 2023 to 2019 allows Barcelona Global to observe better the long-term trends.

Below is the scale of rating:

1	2	3	4	5	6	7
Very	Quite	Somewhat	Neutral	Somewhat	Quite	Very
unsatisfied	unsatisfied	unsatisfied		satisfied	satisfied	satisfied
unimportant	unimportant	unimportant		important	important	important
unhelpful	unhelpful	unhelpful		helpful	helpful	helpful

## Executive Summary - Outline

**The 2023 International Talent Monitor offers new insights into the strengths and opportunities of Barcelona, a city that continues to be highly attractive to international talent, mainly due to its quality of life: advantageous geography and pleasant weather all year round, cultural offering and gastronomy, sports facilities, good healthcare, research and education system, and excellent public transport within the city.**

**The quantitative data (1008 respondents) and insights gathered from 8 cross-sector focus groups suggest that it might be easier to attract than to retain international talent over the long-term.**

### **Barcelona as a cosmopolitan global city**

The International Talent Monitor shows that Barcelona has maintained its reputation as a cosmopolitan global city with diverse cultural influences and opportunities. The perception of the city as a global hub slightly increased over the years, making it easier to attract skilled international professionals.

### **Great quality of life but the cost of living keeps rising**

Barcelona continues to attract international talent with its lifestyle and living conditions. However, the increase of the cost of living and particularly the rise of rental and house prices, combined with a high tax burden, low salaries and working conditions perceived as less satisfactory, require special attention.

### **The need to simplify and digitalize administrative procedures**

There has been great progress to improve the administrative processes for professionals landing in Barcelona, although there is still important work to do, for example in the areas related to the NIE and pensions. Also, the improvements need to be more widely communicated to the target audience, as many professionals still have never heard about, for example, the Barcelona International Welcome Desk.

### **Healthcare, research and education**

Barcelona has a quality healthcare system, with a significant portion of respondents having both public and private coverage. This is an important asset particularly when it comes to attracting and retaining international families and senior talent. In terms of education, international schools remain popular but are perceived as too expensive, and the satisfaction level with the academic quality of universities or higher education has remained positive and stable over the last years.



## **Sustainability**

In this edition, for the first time, we have chosen to add this section as it represents a growing concern for international talent, as for the population as a whole, and may have an impact on Barcelona's ability to attract and retain them. Barcelona needs to address air quality concerns and prioritize sustainable transportation options. The satisfaction with city transport has increased and is perceived as an important asset. However, respondents stressed the importance of developing efficient public transport linking Barcelona with the cities that are part of the Area Metropolitana of Barcelona. A strong focus on public and active transport can reduce greenhouse gas emissions and improve city life for residents. Also, the respondents emphasized the need for the city to focus on sustainable and high-quality tourism, rather than mass tourism, which brings negative impacts on cleanliness and safety.

## **A sense of belonging that takes time to build**

Barcelona is generally perceived as open and accepting of international talent. However, the feeling of social integration has slightly decreased, highlighting the importance to build bridges between Barcelonians and international communities to increase this sense of belonging.

## **Reasons for leaving Barcelona**

While nearly half of the respondents have no plans to leave, a significant portion expressed intentions to leave within a few years or the distant future. Affordability, job opportunities, and career prospects are key factors influencing decisions to stay or leave. It highlights the need for ongoing efforts to attract and retain international talent in Barcelona.

## **Top 5 Future Opportunities**

According to the survey respondents, Barcelona can capitalize on opportunities in (1) Sustainability, (2) Culture, Arts and Music, (3) Education, (4) Computer, Technology and Software, and (5) The Startup ecosystem. Developing these sectors can drive economic and sustainable growth, innovation, and attract more international talent.

## **Conclusion**

Overall, Barcelona's cosmopolitan appeal and attractive lifestyle make it an interesting destination for international talent. However, addressing challenges related to cost of living, taxes and low salaries, complex administrative procedures, and security, will be critical to maintaining its global competitiveness in the future. By focusing on future opportunities, sustainability, and fostering an inclusive environment, Barcelona can continue to attract and retain international talent, contributing to the city's long-term success.

# Calls to Action 2023

## 1. Improving taxation and push for more competitive salaries

Barcelona scores very high in terms of attractiveness for international professionals and as a location for entrepreneurship. The Startup Act, passed on December 2022, has aligned Spain's tax system structure with those of neighboring countries and it has improved the landing procedures for entrepreneurs and investors. Some of the changes promoted by Barcelona Global, such as the reduction to 5 years of the time that a professional has to live abroad to benefit from the non-resident regime, the possibility of extending it to spouse or linking the taxes on stock options to liquidity events are particularly welcome. Nevertheless, there are pending issues that are still important to address to maintain Barcelona's competitiveness among stakeholders that play an energizing, fundamental role in the local economy. Examples of these are the enlargement to 10 years of the non-resident regime (it is now applicable only for 5 years, which results in many international professionals planning from the start a 5-year stay), the rationalization of the exit tax or the alignment of the tax structure linked to entrepreneurial success is the new economy (because it is currently design for traditional businesses).

Also, it is essential that Barcelona Global initiates discussions with its partners to see how salaries, which are perceived as low compared with other European and North American countries, for example, can be increased to promote better attraction and retention of talent, both international and local.

## 2. Push for more affordable housing

The availability of affordable housing is a real issue, not only for international talent but also for locals, and the perception has worsened since the last report. Developing a comprehensive strategy for affordable and social housing, with public and private collaboration, should be one of Barcelona's top priorities.

## 3. Simplifying and digitalizing administrative procedures

Following conversations with Barcelona Global, the City Council launched the online portal – Barcelona International Welcome – which gathers information about all the arrival procedures and provides additional relevant information to newcomers, including healthcare, schools, transportation, etc. The City Council has also opened Barcelona's International Welcome Desk, a one-stop shop for all municipal administrative tasks.

However, there is still work to be done to simplify administrative procedures and make them more digital. Namely, at the national level, some administrative procedures still present difficulties to the newly arrived professionals (NIE, pensions, driving licenses, etc.)

## 4. Push for affordable international schools and a better internationalization of higher education

Barcelona is a very attractive location for young professionals, but the city has difficulties attracting senior researchers and middle managers with families, which has a strong impact on the competitiveness of the city's research centres and corporates. One of the main reasons these professionals give for declining offers in Barcelona, is the lack of an affordable, accessible international school for their children. Barcelona needs to address this issue to improve its attractiveness amongst middle managers and senior researchers. These profiles lead on projects and corporate activities that generate important economic activity and local jobs. If corporations and research centers are not able to attract them, they will develop those activities in alternative locations where these profiles can be more easily available, with the consequent loss of opportunity for the city and its inhabitants.

On the other hand, although Barcelona is home to several top and truly global business schools, the percentage of international students in the city's higher education institutions is less than 4%, compared to, for example, 12% in cities such as Amsterdam or Copen-

hagen. Forecasts show that 10.2 million students will graduate in countries different to their own in 2030. This not only represents direct economic opportunity but can bring even greater future benefits in terms of international knowledge and influence, talent attraction, business connections and joint opportunities driven by students that may relocate to their own or other world cities upon completion of their studies.

#### **5. Push for more sustainable policies and practices**

Barcelona, like many major cities, has a problem with air pollution, which adversely affects public health and the environment. To address this issue, it is crucial to implement policies that reduce emissions from vehicles and industrial activities, and encourage cleaner energy sources. Moreover, promoting cycling and walking infrastructures can not only reduce traffic congestion but also contribute to a healthier and greener city. Thus, preserving and enhancing green spaces within Barcelona is vital for the physical and mental well-being of its residents and visitors.

Implementing policies that prioritize urban greening initiatives, such as planting more trees and creating community gardens, can help combat the heat island effect, improve air quality, and create recreational spaces.

Also, an effective and well-connected public transportation system is essential for reducing private vehicle usage and easing traffic congestion, within the city of Barcelona but also between Barcelona and its metropolitan area. Improving Barcelona's connectivity with its metropolitan area can also help promote affordable housing outside the city.

Finally, it is essential to encourage sustainable and high-quality tourism to preserve the city's cultural heritage and minimize the impact on the environment, on cleanliness and safety.

#### **6. Promoting the principles of equity, diversity and inclusion**

Embracing equity, diversity, and inclusion is not only a moral imperative but also a strategic move that can drive innovation, enhance employee productivity, and foster long-term success for companies and organizations. Also, promoting diversity in high-ranking positions is not only a matter of justice but also a key driver of innovation and growth. Research has consistently shown that diverse leadership teams lead to better financial performance and increased creativity. Finally, having diverse perspectives on corporate boards is fundamental for effective decision-making. Diverse boards bring unique insights, experiences, and ideas to the table, enabling better problem-solving and strategic planning. When people from different backgrounds, cultures, and gender participate in the decision-making process, companies can better anticipate and respond to the needs of diverse customer bases.

# 1. Barcelona as a Global City – 10 Global Strategic Indicators

We selected 10 main indicators reflecting the main trends. We identify and follow the perception of these 10 key topics to measure Barcelona's global competitiveness.

# 2. Top 10 and Bottom 10 Indicators

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

# 3. Future Opportunities

We asked respondents to identify which sectors the city should prioritize in the future.

## 4. Integration

We asked questions about how respondents perceive their integration in Barcelona.

## 5. Education

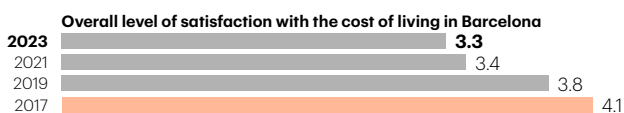
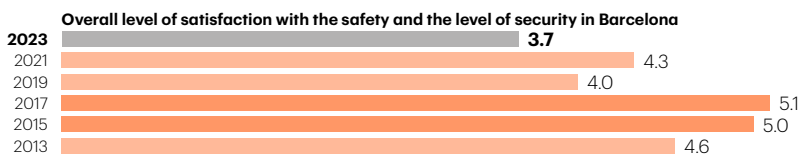
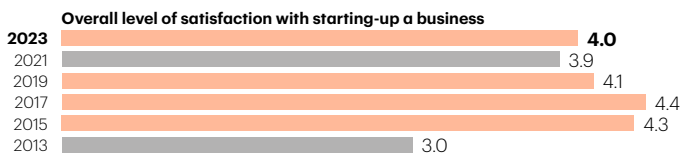
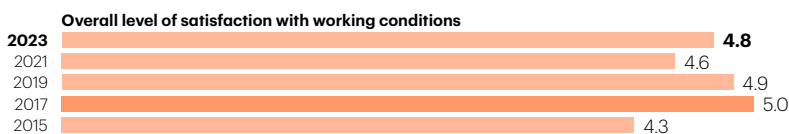
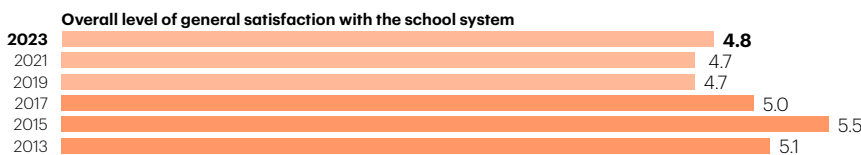
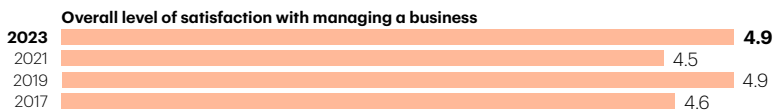
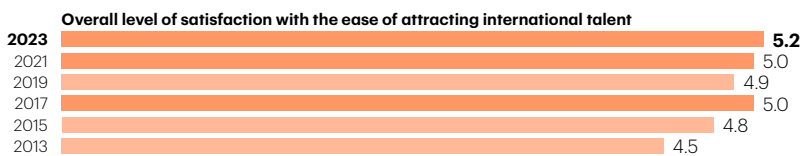
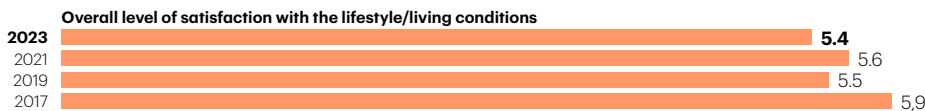
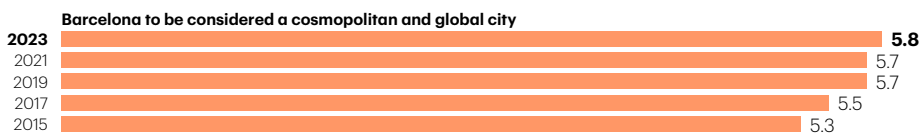
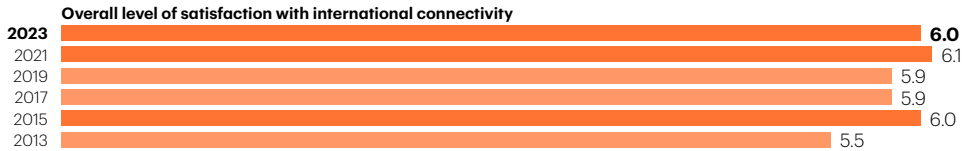
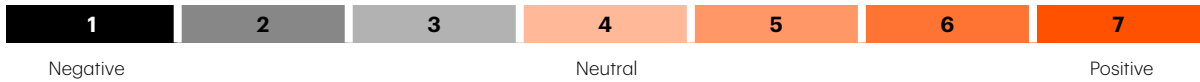
We asked respondents with children for their opinion about education.

## 6. Sustainability

We asked whether respondents consider Barcelona to be a sustainable city.

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

# 10 Global Strategic Indicators



### **Barcelona as a cosmopolitan global city**

Since the first edition of the International Talent Monitor, we have seen that the levels of satisfaction among internationals with the 10 Global Strategic Indicators remain relatively stable. The satisfaction with international connectivity has slightly increased from 2019 (5.9) to 2023 (6), as has the perception of Barcelona as a cosmopolitan global city from 2019 (5.7) to 2023 (5.8). This suggests that Barcelona has maintained its reputation as a global city with diverse cultural influences and opportunities. Also, we note the increase of the satisfaction with the ease of attracting international talent (from 4.9 in 2019 to 5.2 in 2023). This suggests that there has been an improvement in the perception of Barcelona's attractiveness to international talent, making it easier to attract skilled international professionals.

### **Lifestyle and living conditions still positive despite rising costs of living**

Overall, the respondents' satisfaction with the lifestyle and living conditions indicates that Barcelona is still considered as an attractive place to live and work, even if we note that this indicator has slightly decreased from 2019 (5.5) to 2023 (5.4). This slight drop is probably due to the perception of the rise in the cost of living: it has decreased from 2019 (3.8) to 2023 (3.3), and even more so when we compare it with 2017 (4.1). Also, the perception of the level of security in Barcelona has decreased from 2019 (4) to 2023 (3.7), and even more so if we compare it to 2017, when the satisfaction rate was positive (5.1).

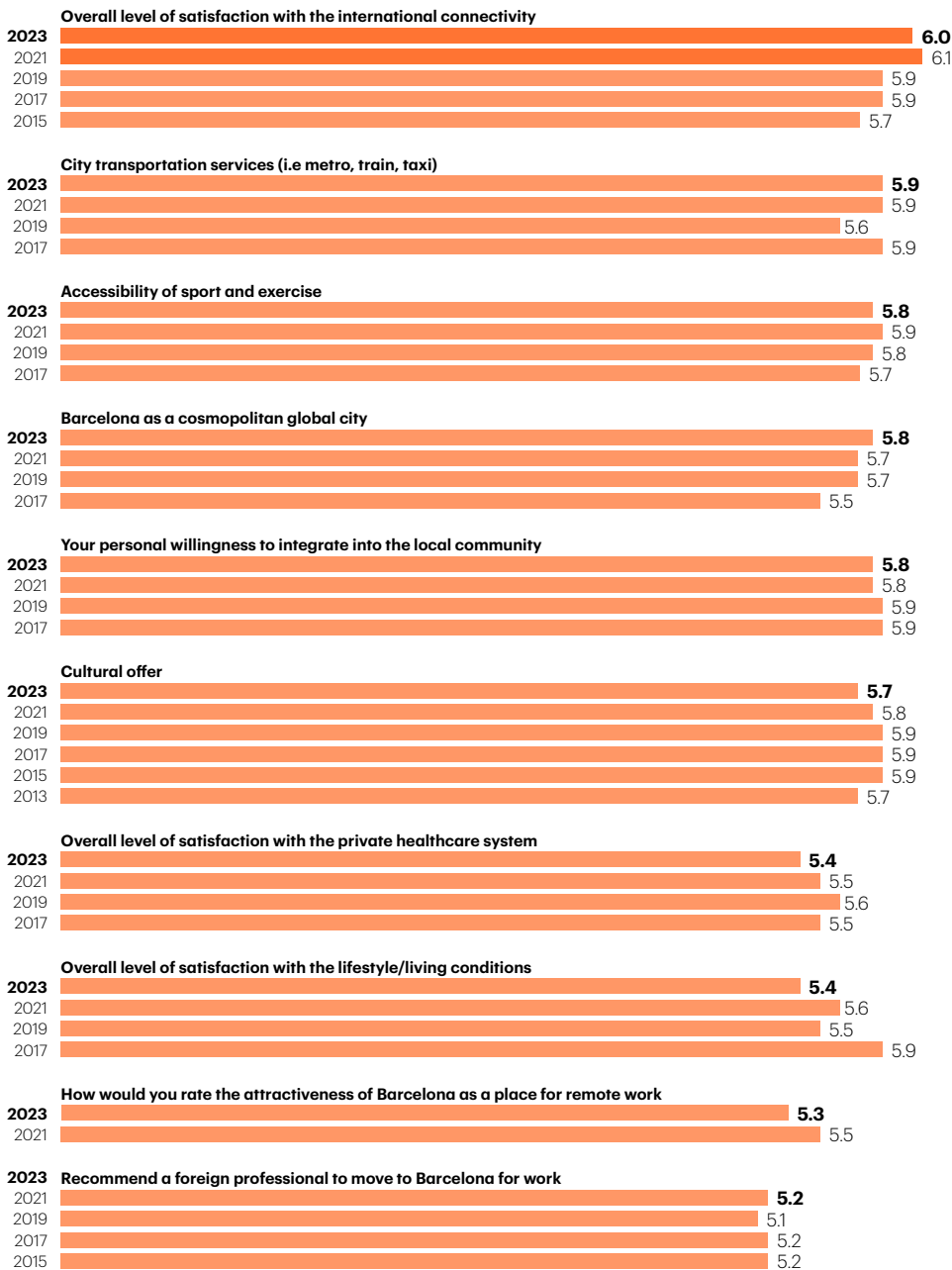
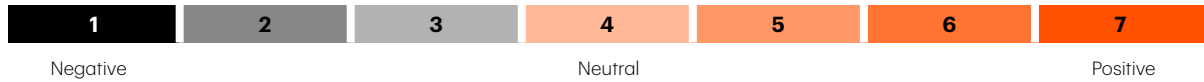
On the other hand, the satisfaction with the school system has slightly increased from 2019 (4.7) to 2023 (4.8) but has not yet reached the 'Somewhat satisfied' line of 5.

### **Working and business challenges remain**

The respondents' satisfaction with starting-up a business has remained stable between 2019 (4.1) and 2023 (4), which is confirmed by participants of our focus groups: there is still considerable frustration with the regulatory framework and administrative procedures required when starting a business in Barcelona. Easing the administrative burden is certainly a point that requires the attention of government authorities.

Regarding the satisfaction with managing a business, the indicator has remained stable between 2019 and 2023 (4.9). It is therefore interesting to note that the respondents' satisfaction with working conditions has slightly decreased from 2019 (4.9) to 2023 (4.8). The lack of flexibility on the part of certain employers regarding remote working was particularly pointed out by focus group participants.

# Top 10 Indicators





### **Barcelona's lifestyle and living conditions continue to attract international talent**

As mentioned in the section on the 10 Global Strategic Indicators, Barcelona remains a particularly popular location for its lifestyle and living conditions. In the focus groups, participants noted that Barcelona has all the ingredients to attract and retain international talent: lifestyle, pleasant weather all year round, advantageous geography and access to mountains and beaches, good health system, excellent public transport within the city of Barcelona, modern infrastructures, rich culture and gastronomy, sports facilities...

In addition, it's interesting to note that there was a slight increase in satisfaction among respondents who consider Barcelona to be a cosmopolitan global city from 2019 (5.7) to 2023 (5.8). Also, the personal willingness to integrate into local community is still perceived as positive, even if we can see a slight decrease from 2019 (5.9) to 2023 (5.8). Finally, the recommendation for a foreign professional to move to Barcelona for work has remained stable and somewhat positive between 2019 and 2023 (5.2).

### **A quality healthcare system**

Healthcare system indicators are still perceived as positive by survey respondents and focus groups participants. The data shows that in 2023, a significant percentage of the respondents (39.2%) make use of both public and private healthcare systems, and that there are more people using only the private healthcare system (35.4%) than those utilizing only the public system (25.4%). However, the satisfaction level with both the public and the private healthcare system has slightly decreased from 2019 (5.1 for public and 5.5 for private healthcare) to 2023 (4.9 for public and 5.4 for private healthcare). This is an important asset for Barcelona, particularly when it comes to attracting and retaining senior talent.

### **Efficient public transport within the city**

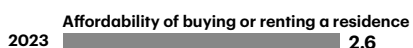
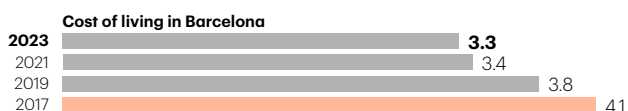
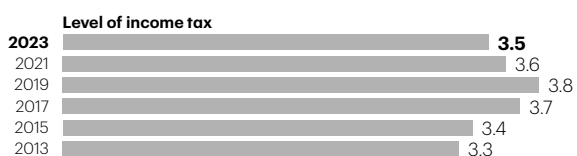
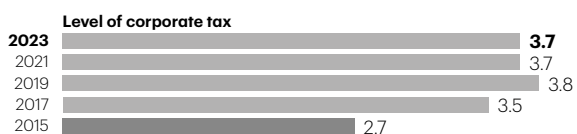
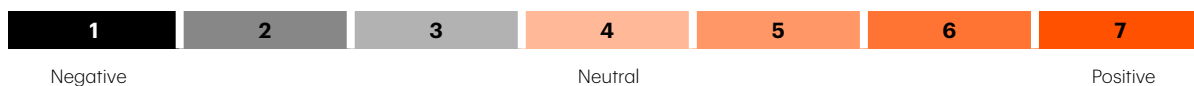
It is important to note that 78% of respondents live in the city of Barcelona (and 22% in the Metropolitan area). The satisfaction with city transportation services has increased from 2019 (5.6) to 2023 (5.9) and is perceived as an important asset. This suggests that there has been an improvement in the transportation infrastructure and services provided by the city of Barcelona over the past few years.

Finally, as mentioned in the section on the 10 Global Strategic Indicators, the satisfaction with international connectivity has slightly increased from 2019 (5.9) to 2023 (6).

### **Towards a strategic and sustainable vision of cultural and tourism development**

It is interesting to note that the satisfaction with the cultural offer has slightly decreased from 2019 (5.9) to 2023 (5.7). In the Tourism, Culture, and Sports focus group, it was mentioned that Barcelona has an enormous potential to develop its identity and cultural offering. However, to do so, Barcelona would need more investment in culture, as well as a strategic vision. Culture is essential to the city and part of its identity and is important for the wellbeing of its population. An important point emphasized in all the focus groups was the need for the city to focus on sustainable and high-quality tourism, rather than mass tourism, which brings negative impacts on cleanliness and safety for example.

# Bottom 10 Indicators



### **A constantly rising cost of living**

First, it is interesting to note that 74.4% of the respondents answered that they are not satisfied with the competitiveness of salaries in Barcelona. Then, the perception of the cost of living in Barcelona has decreased from 2019 (3.8) to 2023 (3.3), and even more so when we compare it with 2017 (4.1). One of the most important factors in this rise in the cost of living is likely the increase in the price of rental and house prices. The perceived affordability of buying or renting a residence is reported as quite unsatisfactory in 2023 (2.6), representing the lowest indicator in this study. In 2019 and 2017 the housing market was already perceived as somewhat unsatisfactory (3.1 and 3.3). The cost of living in the city is increasing rapidly, and the high price and poor quality of housing have been highlighted as well in the focus groups.

### **A tax burden that is too high**

It is interesting to note that 3 out of 10 'Bottom 10 Indicators' concern the tax burden. The perception of the level of corporate tax, income tax and wealth tax is either somewhat unsatisfactory or quite unsatisfactory. We can see that the satisfaction of corporate tax has slightly decreased from 2019 (3.8) to 2023 (3.7); the satisfaction of income tax has decreased more considerably from 2019 (3.8) to 2023 (3.5); and the second worst indicator is the perception of wealth tax, which is worse in 2023 (3) than in 2019 (3.5). Also, focus group participants believe that taxes may be one of the reasons why it is more difficult to attract and retain senior talent beyond the Beckham Law period.

### **More needs to be done to simplify and digitalize administrative procedures**

The satisfaction with administrative processes still scores low. However, it is important to note that, in the last few years, there have been improvements to the administrative processes for internationals landing in Barcelona. These changes certainly need to be more widely communicated, as many professionals haven't heard of new support such as the Barcelona International Welcome Desk. In the focus groups, the length of time and bureaucracy involved in obtaining a NIE, the lack of recognition of non-European driver's licenses, as well as procedures concerning the accumulation of pensions with foreign countries were highlighted by participants.

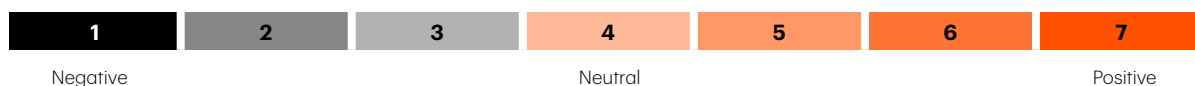
Finally, the perception of the political situation is evolving favourably from 2019 (2.6) to 2023 (3.4).

### **A major concern for air quality and safety**

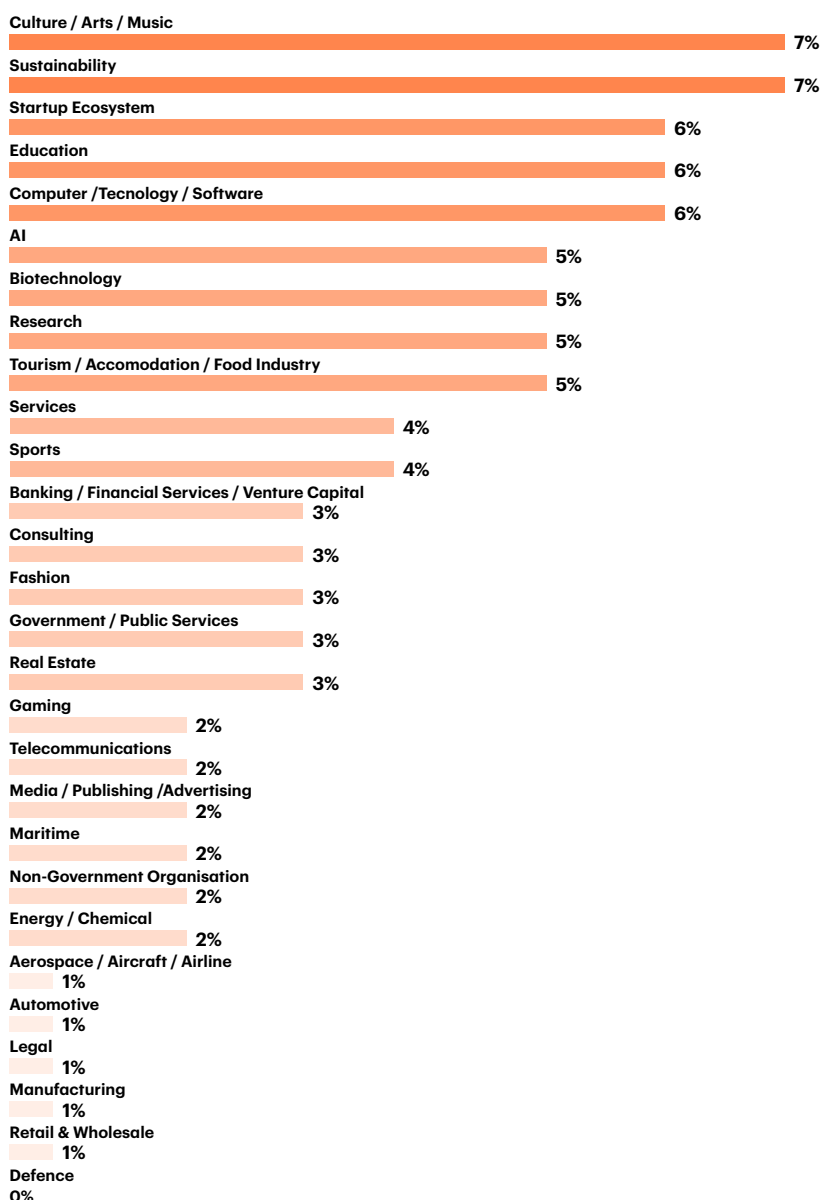
For the first time, we have included in the survey a question on satisfaction with Barcelona's air quality, and respondents answered it as somewhat unsatisfactory (3.5). Finally, the perception of the level of security in Barcelona has decreased more considerable from 2019 (4) to 2023 (3.7), and even more so if we compare it to 2017, when the satisfaction rate was positive (5.1).

# Future Opportunities

## Remote work & working conditions



## Which sectors should Barcelona focus on after the crisis?



## Remote working

In 2023, Barcelona is perceived as somewhat attractive for remote work, and the perceptions has slightly decreased from 2021 (5.4) to 2023 (5.3). It is important to note that, on several occasions during the focus group, it was mentioned that it would be more appropriate to promote Barcelona as a destination for medium and long-term living for international talent, thinking that they would invest themselves more in integrating into their host society.

On the other hand, the satisfaction level with changes in working conditions over the past years has decreased significantly from 2021 (4.3) to 2023 (3.9). This indicates that individuals may not have experienced significant positive changes or improvement in their working conditions during this period. As already mentioned, dissatisfaction with salary levels and the lack of flexibility on the part of certain employers regarding remote working was particularly pointed out by focus group participants.

## Top 5 Future Opportunities

### 1.

#### **Sustainability**

Sustainability is a growing concern globally, and Barcelona can position itself as a leader in sustainable practices. Developing sustainable mobility solutions, promoting renewable energy, and implementing eco-friendly policies can drive economic growth while preserving the environment.

### 2.

#### **Culture, Arts, and Music**

Culture, arts, and music play a significant role in the city's identity and tourism. Providing a strategic vision and investing for the sustainable development of these sectors can enhance Barcelona's attractiveness as a cultural destination and contribute to its economy.

### 3.

#### **Education**

Investing in education is essential for long-term development. Enhancing educational institutions, promoting research and innovation, and providing opportunities for lifelong learning can lead to a skilled workforce and drive innovation.

### 4.

#### **Computer, Technology, and Software**

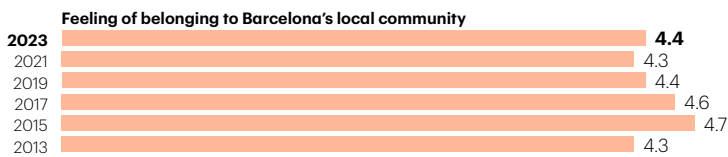
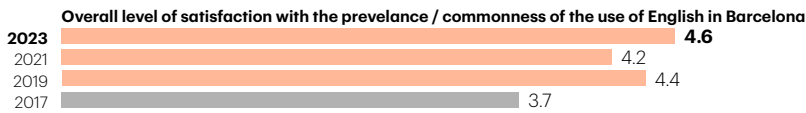
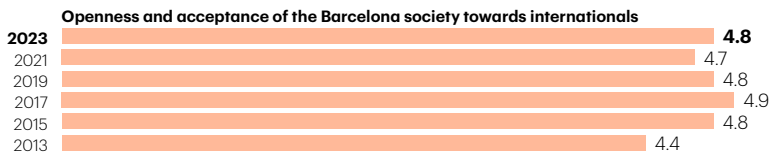
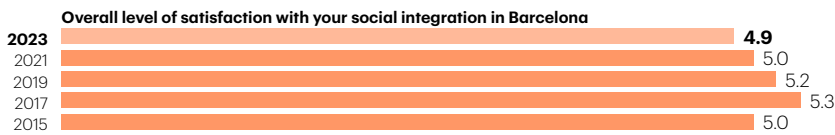
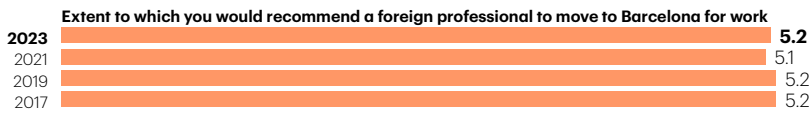
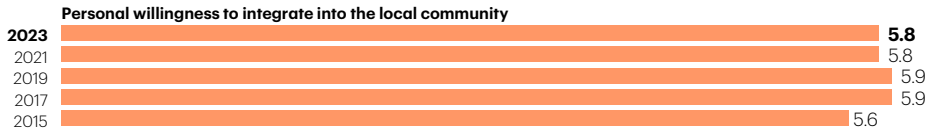
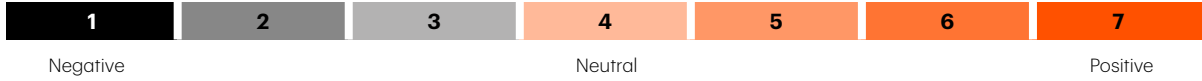
The computer/technology/software sector is crucial in today's digital age. Barcelona can leverage its resources and infrastructure to support technological advancements, attract companies and serve the city's social and economic development.

### 5.

#### **Startup Ecosystem**

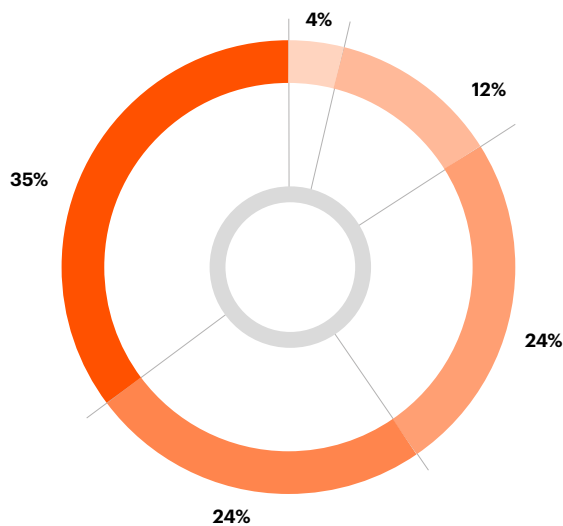
The startup ecosystem is a promising sector for innovation and job creation. Fostering entrepreneurship and support startups can contribute to economic growth, innovation, social development and attract talent.

# Integration



## Prevalence/commonness of the Catalan language

- Poses a higher adaptation challenge for me but I can cope with it
- Not affecting my experience in any relevant way
- Enriching my personal experience
- Making my experience rather unsatisfactory
- Affecting me to the extent that I am considering leaving the city mainly because of this reason



### **A sense of belonging that is not easy to build**

Data shows that the feeling of belonging to Barcelona's local community and the openness and acceptance of Barcelona society towards internationals have remained stable and are at a neutral level (4.8). However, there is a decrease in overall satisfaction with social integration (from 5.2 in 2019 to 4.9 in 2023) and a slight decrease in personal willingness to integrate into the local community (from 5.9 in 2019 to 5.8 in 2023). Despite these changes, Barcelona continues to be perceived as a city that is open and accepting of international talent, making it a potentially attractive destination for foreign professionals.

### **Reasons for leaving Barcelona**

Nearly half of the international talent living in Barcelona (48%) indicate that they have no plans to leave the city. This suggests a relatively stable and content group who are satisfied with their current situation in Barcelona and have no immediate intentions of moving away. However, it should be noted that a significant portion of international talent living in Barcelona, 18%, expressed their intention to leave the city within a few years from now, and that 10% expressed that they will leave in the distant future. This indicates that almost a third of the respondents may be considering alternative destinations or opportunities in the future. Finally, a notable percentage of international talent, approximately 23%, expressed uncertainty about their future plans regarding Barcelona. This uncertainty could be due to various factors such as personal circumstances, career prospects, or external event that may influence their decision-making process. It highlights the need for ongoing efforts to attract and retain international talent in Barcelona. Understanding the reasons behind these intentions and addressing any concerns or challenges can help in developing strategies to attract international talent and succeed in keeping them in Barcelona. Thus, for 40% of the respondents, the reasons for leaving would be a new job or a job transfer (20%) or a better opportunity elsewhere (20%).

### **Catalan, Spanish and English**

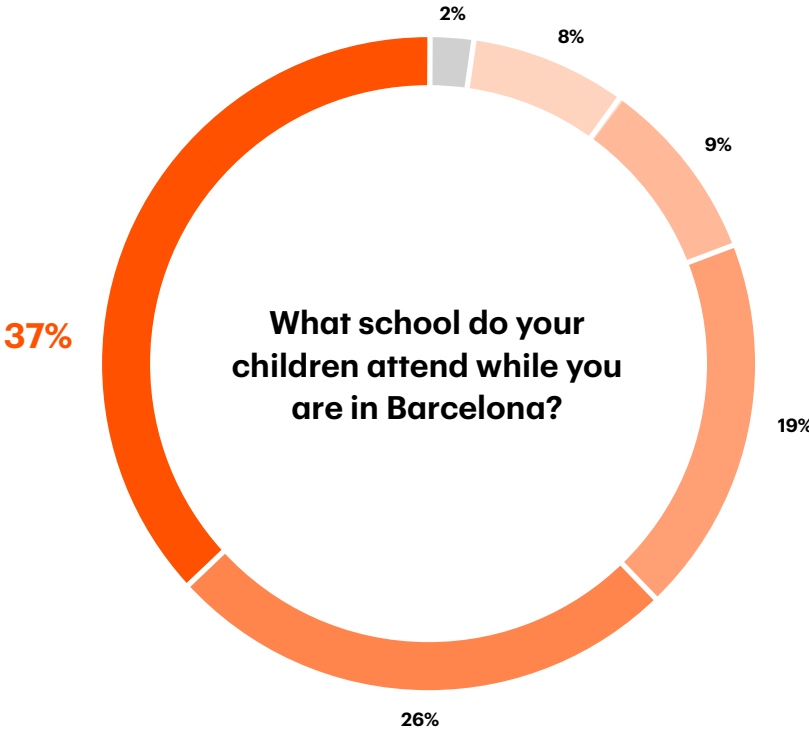
Regarding the internationals' experience with Catalan, it is interesting to note that 48% of the respondents think that either it is enriching their experience or that is not affecting their experience in any way. Also, nearly 35% respondents answered that it poses a higher adaptation challenge, even if they can cope with it. In the focus groups, participants perceived Barcelonians as closed and that it is not easy to integrate, as much of them remain in an expat bubble.

Both in the questionnaire responses and in the focus groups, participants stressed that to facilitate their integration, it would be appropriate for the Spanish Government to set up affordable Spanish courses, as the Generalitat is doing with Catalan classes. Good-quality Spanish courses come at a considerable cost and are an obstacle to learning the language for many and to integrate into the society.

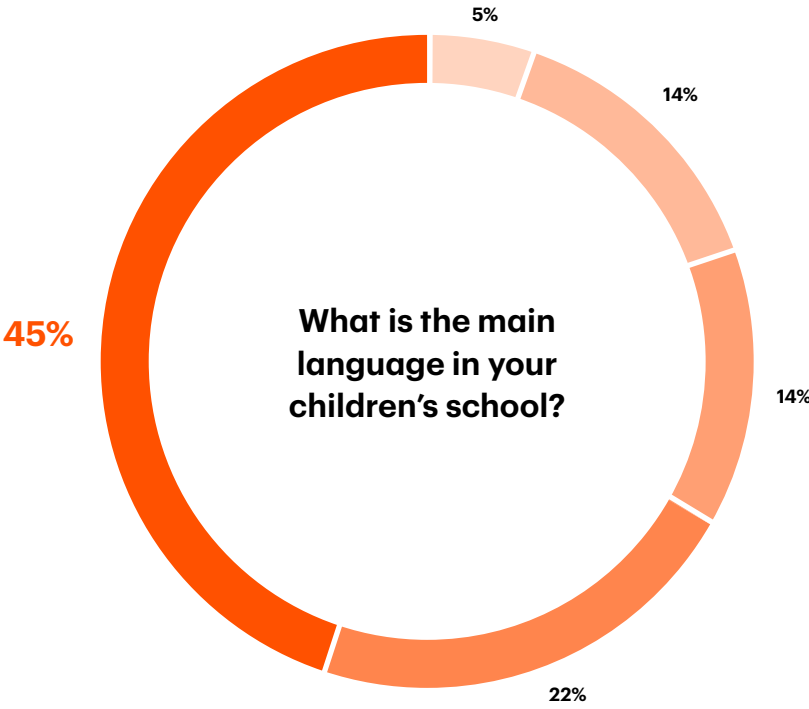
Finally, even if the perception of the prevalence of commonness of the use of English in Barcelona has increased between 2019 (4.4) and 2023 (4.6), it is still identified as a barrier in public administrations and makes the experience of administrative procedure even more difficult for people who do not yet speak sufficient Spanish or Catalan.

# Education

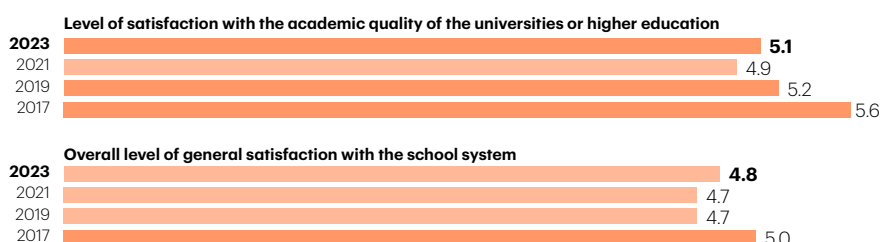
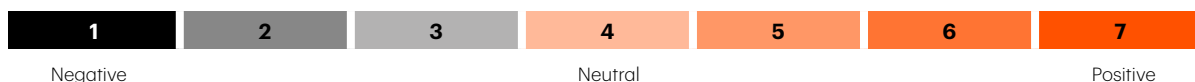
- International school
- Concertada
- Public local school
- Private local school
- Other
- A different school overseas



- Catalan
- English
- Spanish
- French
- German







### International schools popular but expensive

The data shows that there has been changes in the school choices made by parents in Barcelona. The percentages of children attending public local schools slightly decreased from 2019 (21.3%) to 2023 (19%), while the percentage of children attending Concertada schools increased slightly (23.3% to 26%). However, the most significant change is the decrease in the percentage of children attending international schools in Barcelona, which experienced a notable decline from 46.5% in 2019 to 37% in 2023. In the focus groups, the affordability of international schools remains a significant issue that particularly affects international senior talent. The cost of international schools, when considered in conjunction with lower salaries on average and the high cost of housing, make the net income comparatively low for international talent, who look beyond lifestyle and attractiveness when considering a place to settle.

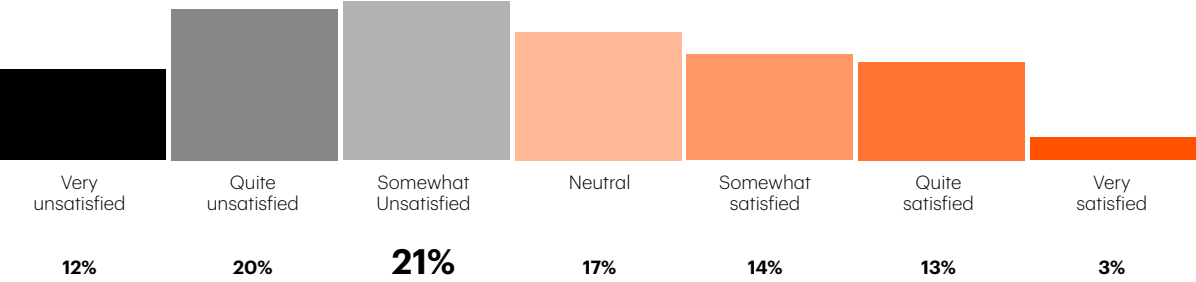
The overall level of general satisfaction with the school system has slightly increased from 2019 (4.7) to 2023 (4.8), but does not achieve a positive score on the satisfaction scale.

### A still positive, but declining, perception of the higher education system

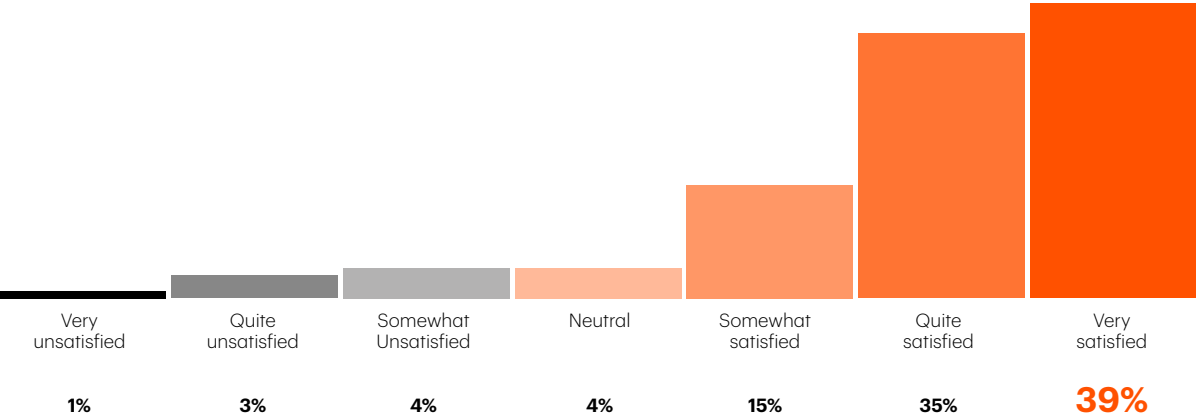
The satisfaction level with the academic quality of universities or higher education has remained positive and stable between 2019 (5.2) and 2023 (5.1), but we note a more substantial drop if we look at the data since 2017 (5.6). To the question ‘How satisfied are you with the research environment in terms of capability and international competitiveness?’ respondents were generally somewhat satisfied and there has been no significant change since 2019 (5.0 in 2019 and 5.1 in 2023). However, in the Research and Innovation focus group, participants emphasized the lack of ambitious science policies and adequate financial resources to fund research and innovation. To under-funding of research and innovation makes it more difficult to attract and retain international researchers, and to retain the country’s best researchers.

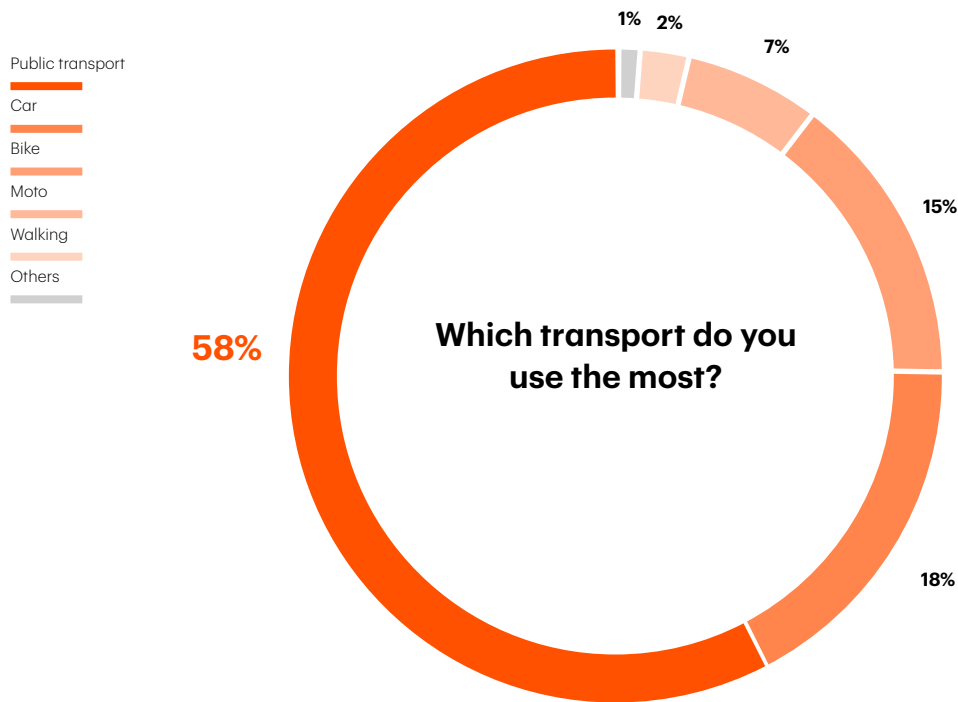
# Sustainability

How satisfied are you with the air quality in Barcelona?



Level of satisfaction with the city transport





**The fight against climate change and sustainable development are certainly important issues for the majority of people who participate in the focus groups. In the questionnaire, several questions measure the degree of satisfaction with indicators that are related with sustainability.**

### Major concern about air quality

As we already reported in the 'Bottom 10 Indicators', respondents were somewhat unsatisfied (3.5) with Barcelona's air quality. In the Mobility, Infrastructure and Sustainability focus group, participants stressed the urgent need for authorities to address the problem of poor air quality in Barcelona. Participants also pointed to the noise pollution suffered by many people living in the city's more densely populated areas, during day and nighttime, which could have an impact on sleep quality and mental health.

Solutions such as reducing the number of polluting vehicles in Barcelona and increasing green spaces were discussed. Even if 'Superilles' are not recognized as the perfect solution, participants stressed the relevance of these urban solutions for improving air quality, reducing noise pollution, and a more pleasant city life for residents living near these projects.

### Prioritizing public and active transportation

It is interesting to note that to the question 'What type of transportation do you use the most?', 57.8% responded by public transport, 17.6% by car, and 14.5% by bike. Alternative modes of transport to the car represent the majority of transportation modes used by survey respondents.

Also, as we saw in the section 'Top 10 Indicators', the satisfaction with city transportation services has increased from 2019 (5.6) to 2023 (5.9) and is perceived as an important asset. However, it is important to note that in both the survey results and the focus groups, participants stressed the importance of developing efficient public transport linking Barcelona with the cities that are part of the Area Metropolitana de Barcelona. For example, people coming from outside the city would like to be able to travel more efficiently to Barcelona by public transport, and people living and working in Barcelona would like to have more housing options outside the city if it were better connected with public transportation. An ambitious plan to promote public and active transport should be a government priority to meet both the needs of local residents and reduce GHG emissions.

# Respondents' Profile

**Demographics, localization and professional status of the respondents are detailed in this section. Many of the data in this profile are very similar with profiles in previous surveys.**

We see a similar group, with nearly 90 nationalities represented amongst the respondents.

The group features mainly Europeans (64%), most of them have a graduate degree (59% have a master's degree, and 14% have a Doctoral Degree), 35% are working for a local company and 32% for an international company, and finally, there's almost an equal gender balance (approximately 53% of the respondents are women).

Also, it is interesting to note that:

More than 73% of respondents are married or living with a partner.

Near 78% of respondents live in Barcelona city (not the Metropolitan Area).

By far, the biggest group are international working in the computer, technology and software sector (20%), followed by the research sector (13%), and the health care and pharmaceuticals sector (9%). In addition, it is interesting to note that 51% of respondents earned 50,000 euros or less per year (before taxes).

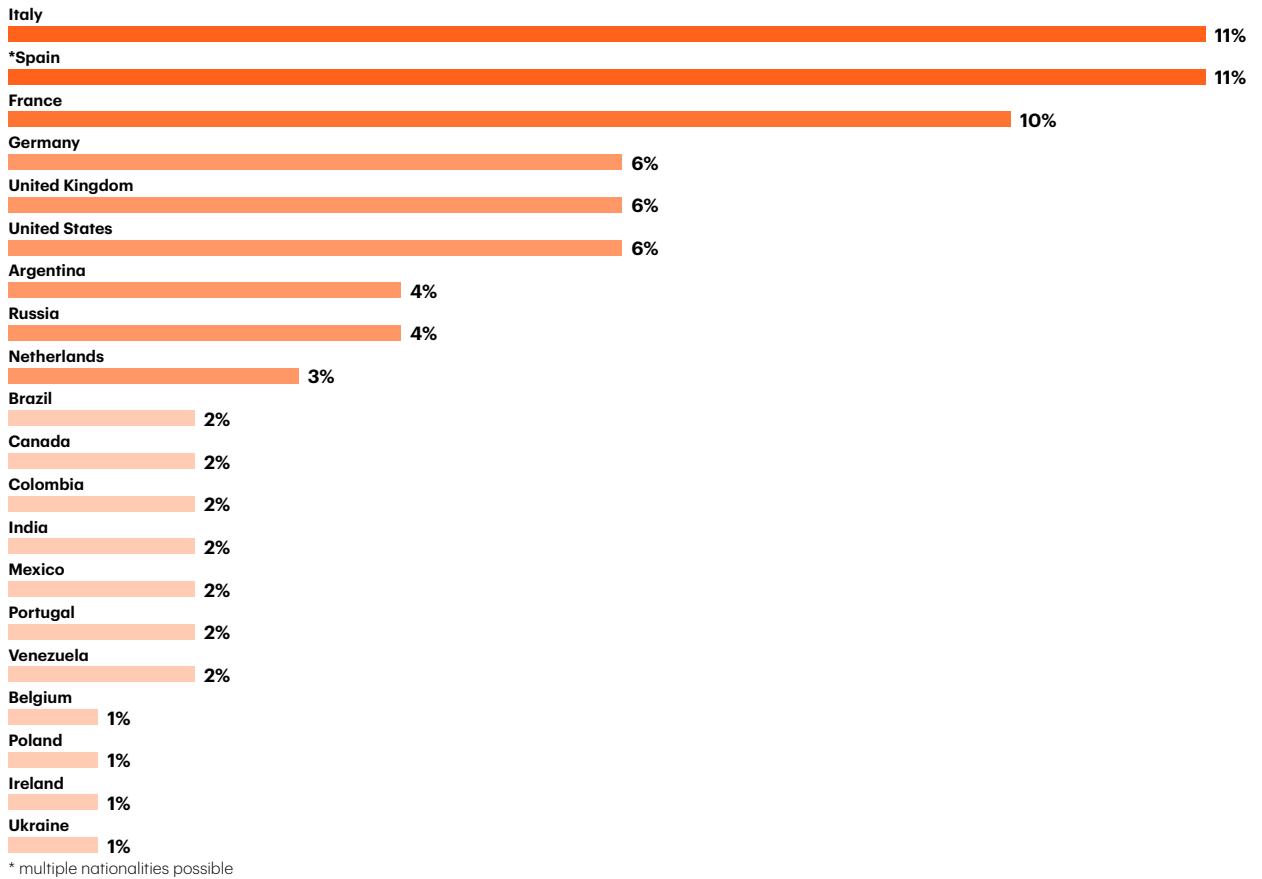
Interestingly, but not surprisingly, the average annual salary of the women who responded to the questionnaire is significantly lower than that of the men. Thus, 63% of them earn less than 50,000 euros a year, compared with 38.8% of men. And 9.1% of women earn more than 100,000 euros a year, compared with 26.1% of men. Also 10.4% of women answered that they hold top management positions, compared with 19.6% of men, and 45% of women do not hold managerial positions, compared to 31% of men.

**These results beg the question whether improving salary equity and leadership positions for women can also help Barcelona attract and retain international female talent.**

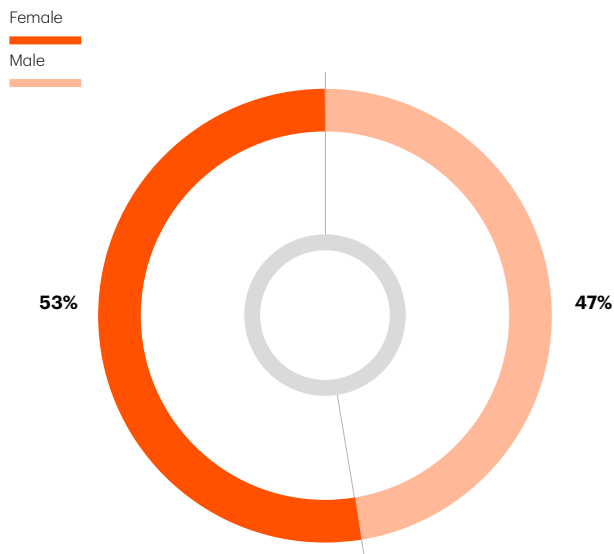
More broadly, it is certainly worth exploring how the promotion of principles of equity, diversity, and inclusion can become a strategy for Barcelona to attract international talent, foster innovation and creativity leading to the long-term success of companies and organizations based in Barcelona.

# Demographics

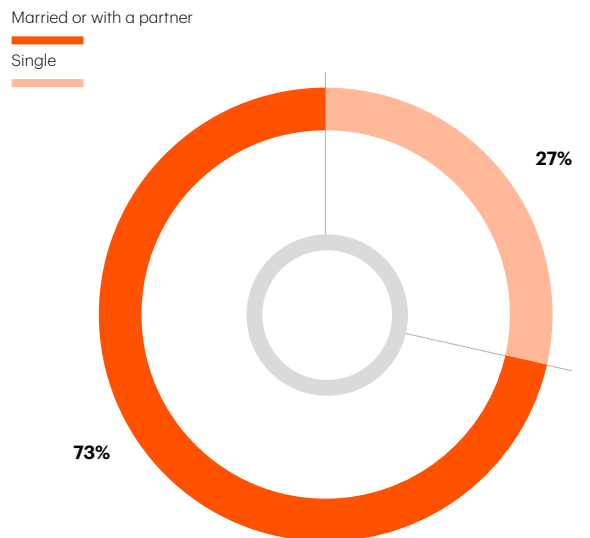
## Nationality by country



## Gender

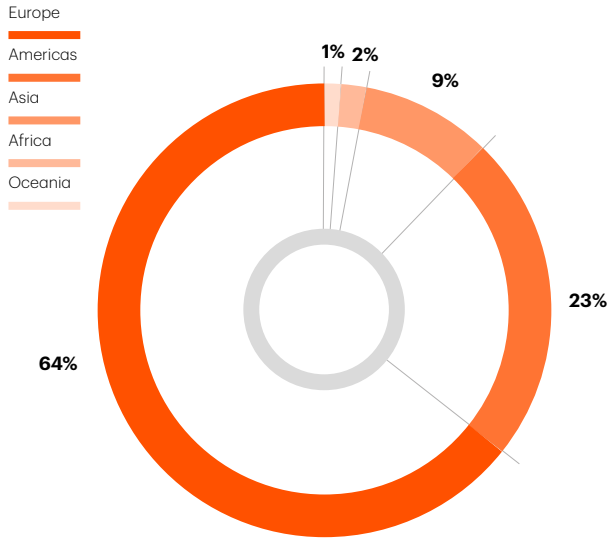


## Marital status

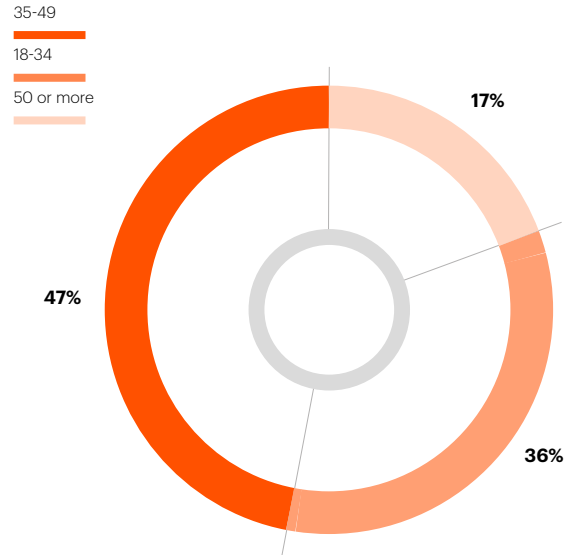


## Demographics

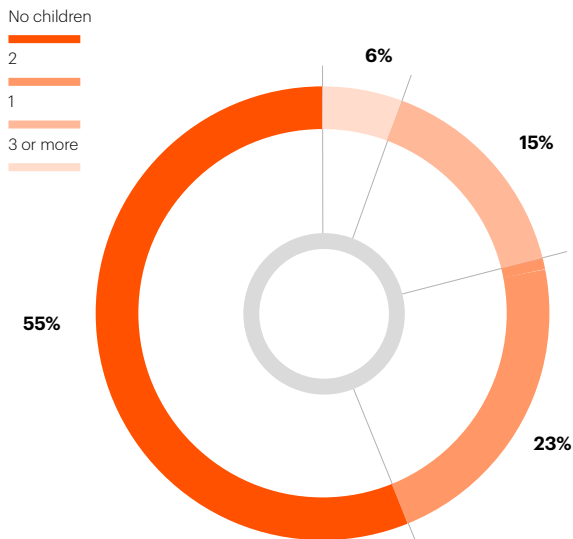
### Nationality by continent



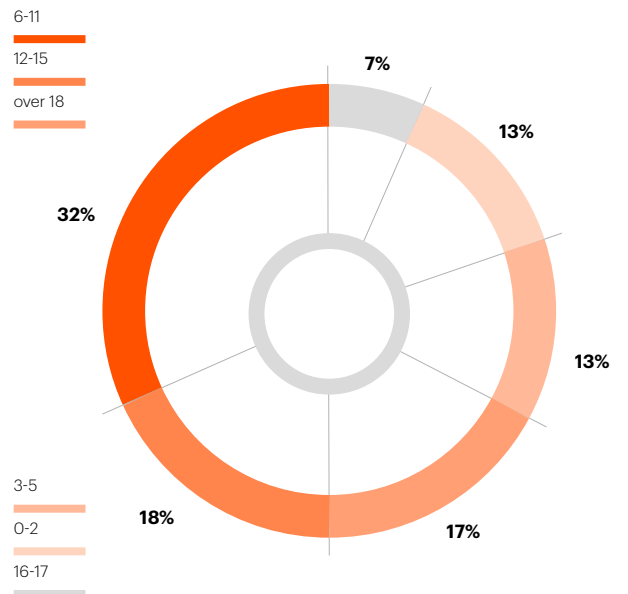
### Age group



### Children

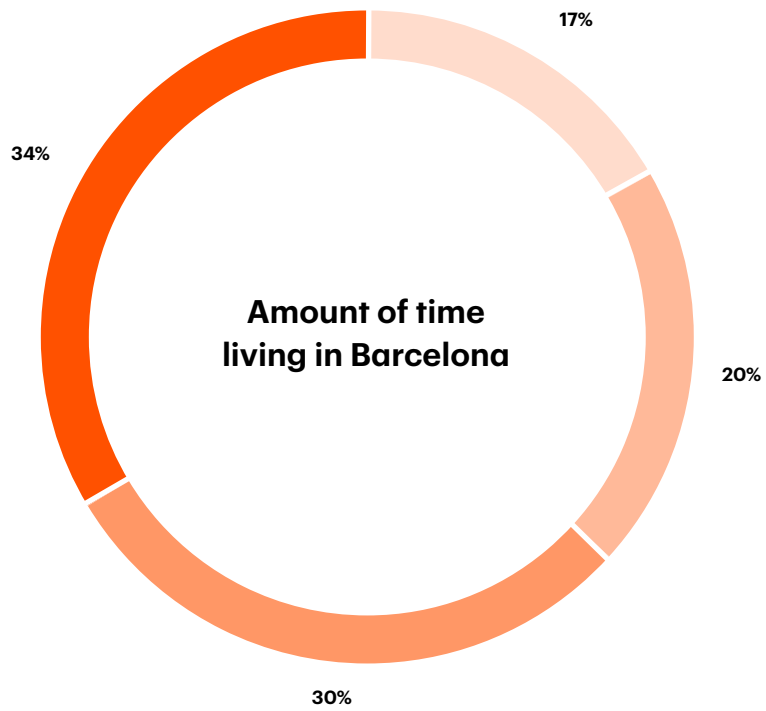


### Children's ages

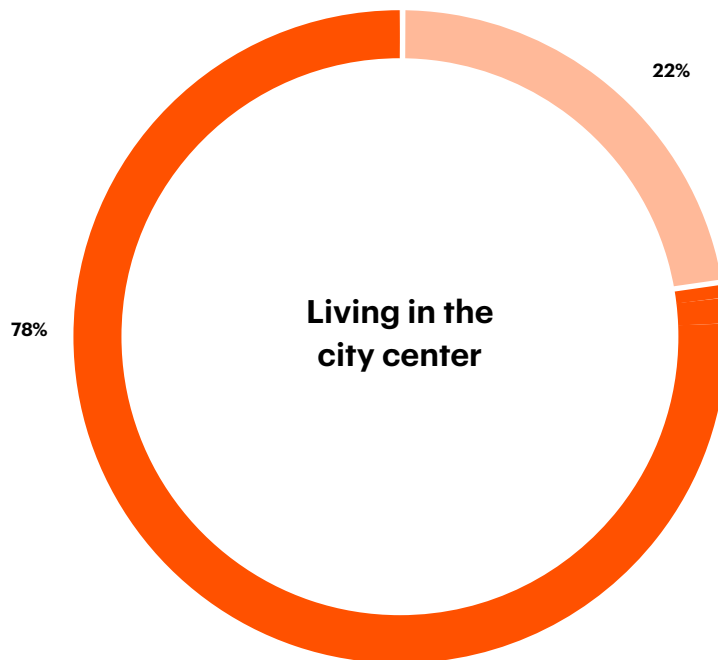


# Localization

- Less than 2 years
- More than 10 years
- 3-5 years
- 6-10 years

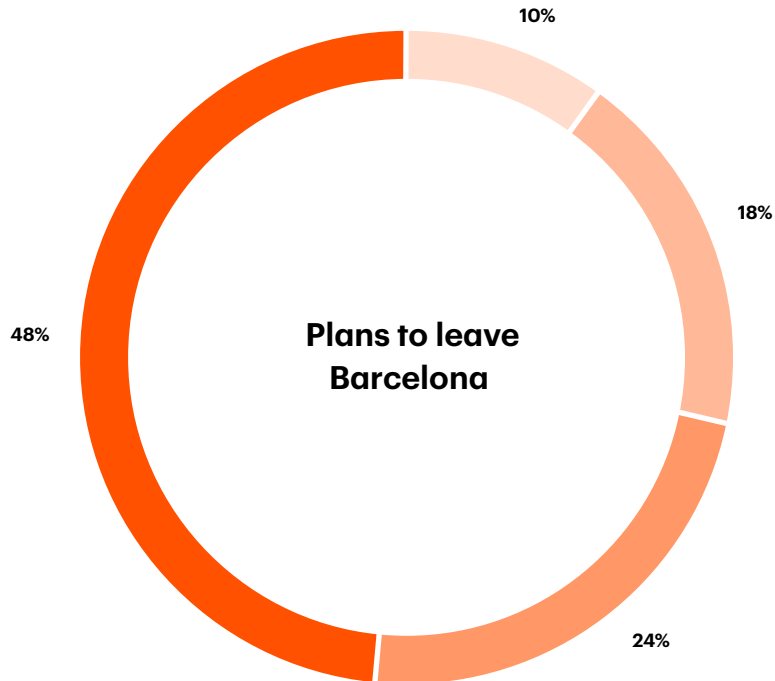


- Barcelona City
- Barcelona Metropolitan Area

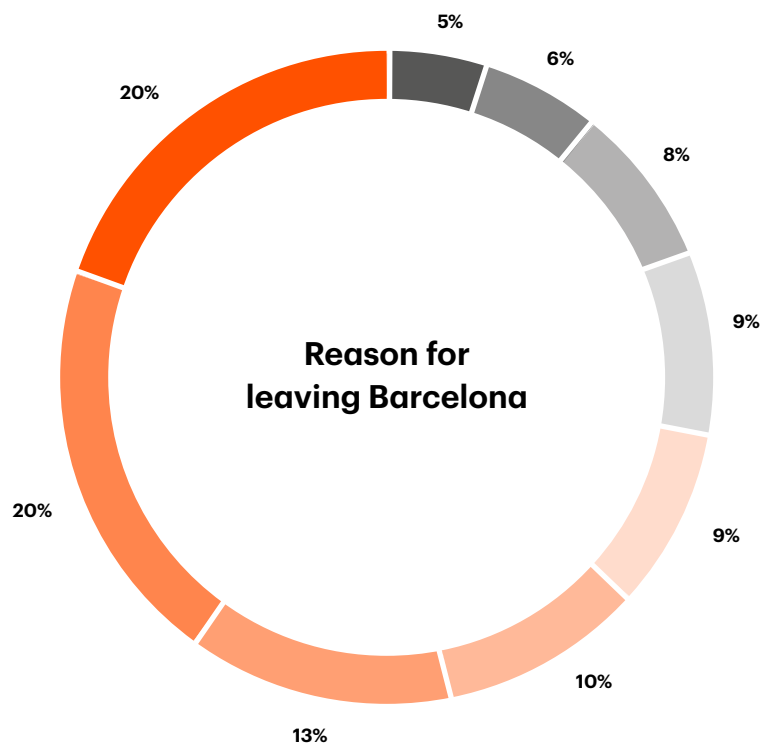


## Localization

- Not considering leaving
- Unsure
- Will leave within a few years from now
- Will leave in the distant future



- Better opportunity elsewhere
- New job or job transfer
- Economic situation
- Political situation
- Difficulty of partner to find an adequate job
- Other
- Tax issues
- Children's education
- Retirement



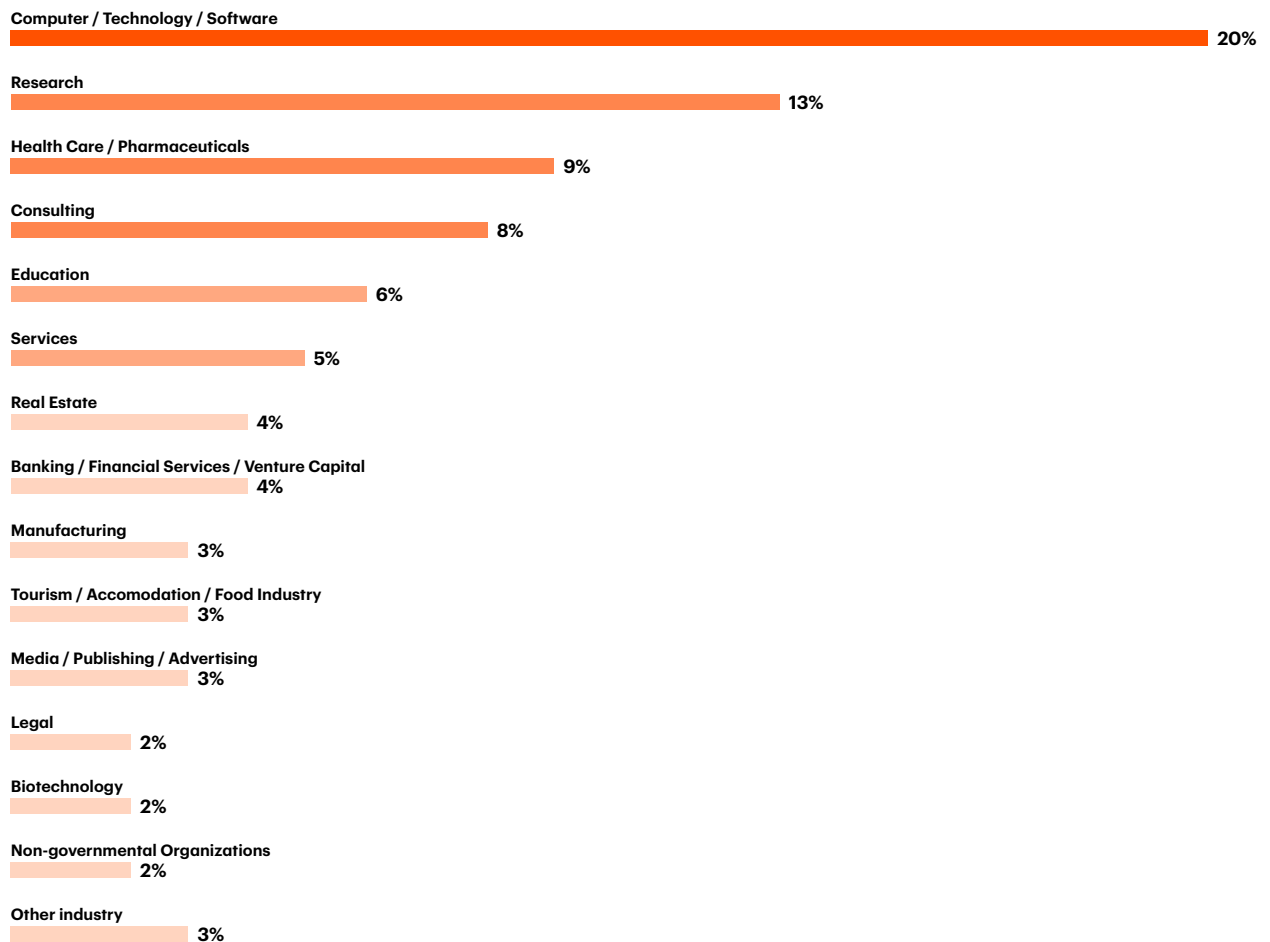


# Professional Status

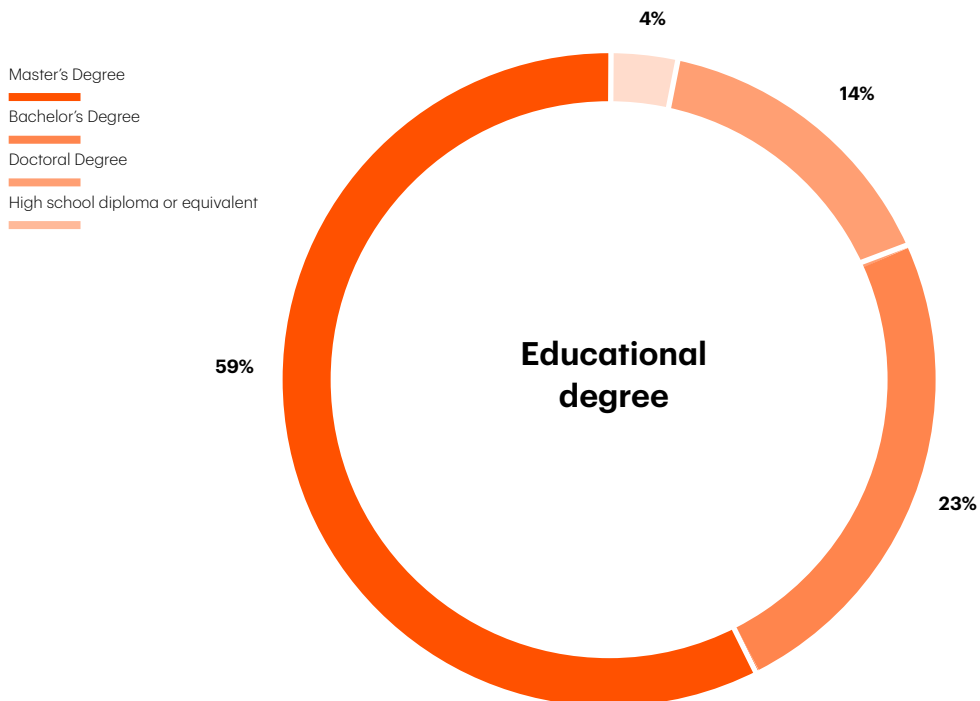
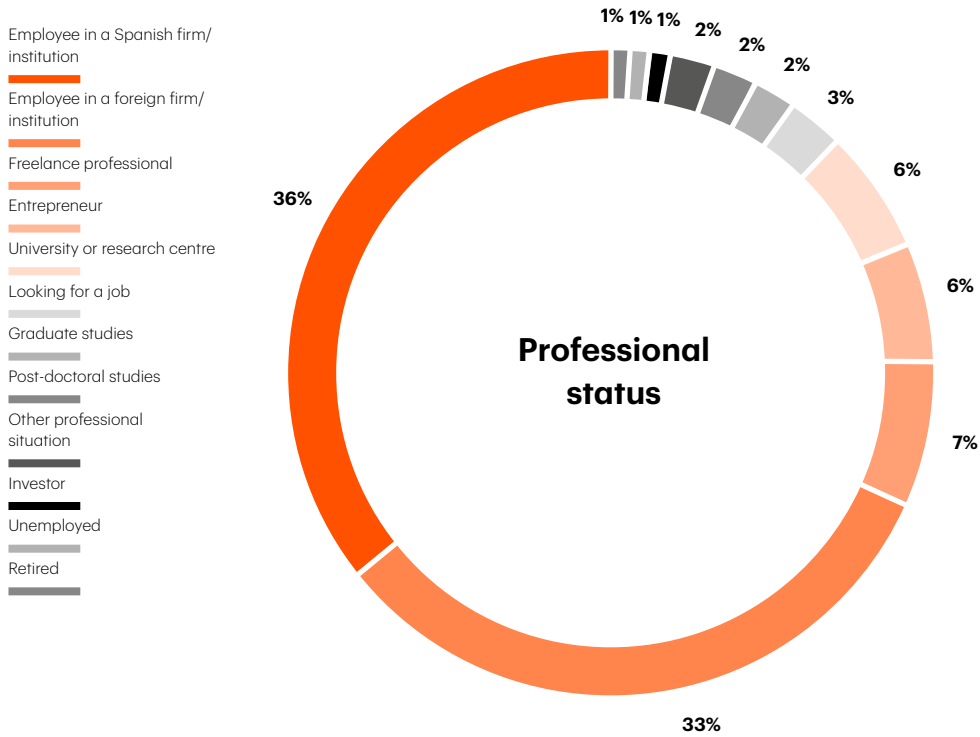
## Are you currently working or have been involved in a business in Barcelona over the last 3 years?

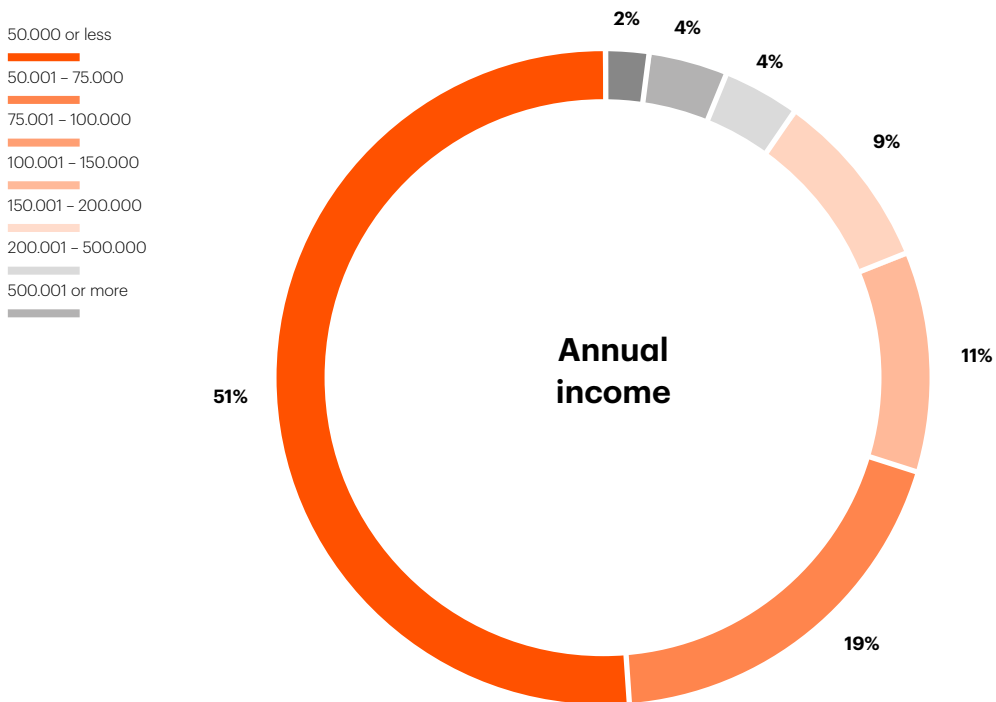
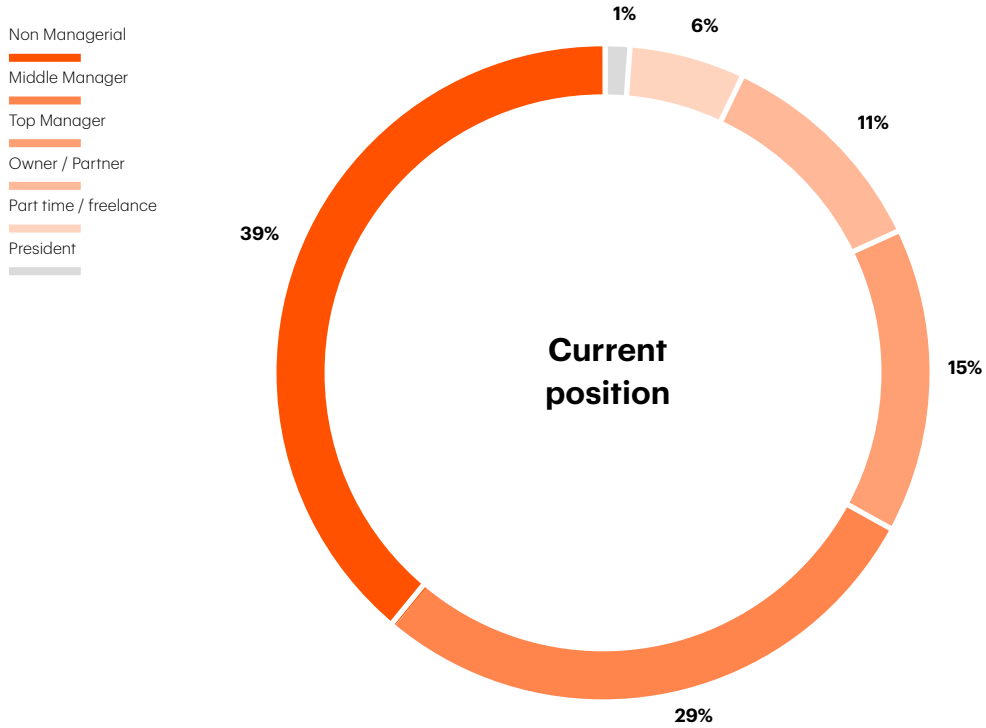


## Main industry



## Professional status





2023 Barcelona Global

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RACC  
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SAP  
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SocialPoint  
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Spaces  
Tactic Talent  
Talem Group  
TAX Advocats and Economists  
TGT  
TIER Mobility  
Turo Park Dental & Medical Center, Smit Healthcare S.L  
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UKIO  
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Webhelp  
Winid  
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Ajuntament de Barcelona  
Barcelona Activa  
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Cámara de Comercio Alemana para España  
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IESE Business School  
Institut Barcelona d'Estudis Internacionals (IBEI)  
Institut Químic de Sarrià (IQS)  
Istituto Europeo di Design (IED)  
Happy Way International Preschool  
Harbour Space Univeristy  
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Barcelona Supercomputing Center  
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Sant Pau Recinte Modernista

### Individuals

Adina Levin  
Katrina Logie  
Marion Sanchez

## Focus Group Attendees

### CITY SERVICES & HOUSING

Alberto Escubós, Monero Meyer Abogados  
Mirjam Maarleveld, Barcelona Expat Life  
Pascal Philippe Bourbon, BRS Relocation Services  
Helen Pino, Legal 70  
Beatriz Carro de Prada, BRS Relocation Services  
Judith Romera, Ajuntament de Barcelona  
Sabina Schladitz, All About Concepts

### EDUCATION

Delphine Arnau, TBS Education in Barcelona  
Natalia Borovkova, Happy Way  
Ioana Dobrin, Benjamin Franklin International School  
Ben Hunter, Spark School  
Kaitlin Hunter, Ermitage International School of France  
Andrea Marchesi, Istituto Europeo di Design  
Bertram Müller, Universitat Internacional de Catalunya  
Jorge Rojas, Oxford Education Lit  
Willem van Rossem, Ferrieres

### HEALTH & PHARMA

Carine Lebecque, Turó Park Clinics  
Yann Malaud, Freelance  
David Rayero, Sanofi  
Pablo Villoslada, Stanford University

### INVESTMENT

Pepe Agell, Pear VC  
Carlos de la Barra, Freelance  
Jordi Casas, Osborne & Clarke  
Frank Düllman, Accenture  
Anna Klevtsova, Klev&Vera  
Monica Madrigal, Barcelona Activa  
Eduardo Rallo, BCN Properties  
Richard Simpson, Fenwick Media  
Yann de Vries, D5S  
Sandra Martínez-Rovira, Quadpack

### MOBILITY, INFRASTRUCTURE & SUSTAINABILITY

Ebru Baykal, Architect M.Sc.  
Carolyn Daher, ISGlobal  
Anna Klevtsova, Klev & Vera  
Maria Teresa Machado, Håbil Håbitat  
Mireia Martí Isern, Areas Worldwide  
Rossana Montemurro, Cooltra  
Alexandra Erel Rodriguez BeWay  
Eva Romagosa, BusUp

### RESEARCH & INNOVATION

Anna Riera, Institut de Recerca Josep Carreras  
Adriana Rue, Barcelona Supercomputing Center  
Borja Esquirol, bChange Mindset Management  
Daniele Lezzi, Barcelona Supercomputing Center  
Emilià Pola, ICREA  
Eva Fortes, IBEI  
Nuria Bayo, BIST  
Ray Guan, IESE Business School  
Silvia Tórtola, Center for Genomic Regulation

### STARTUP AND TECH

Damiana Casile, TravelPerk  
Anna Klevtsova, Klev&Vera  
Chené Koscielny, Content BCN  
Anabel Sanz, Center for Genomic Regulation

### TOURISM, CULTURE AND SPORTS

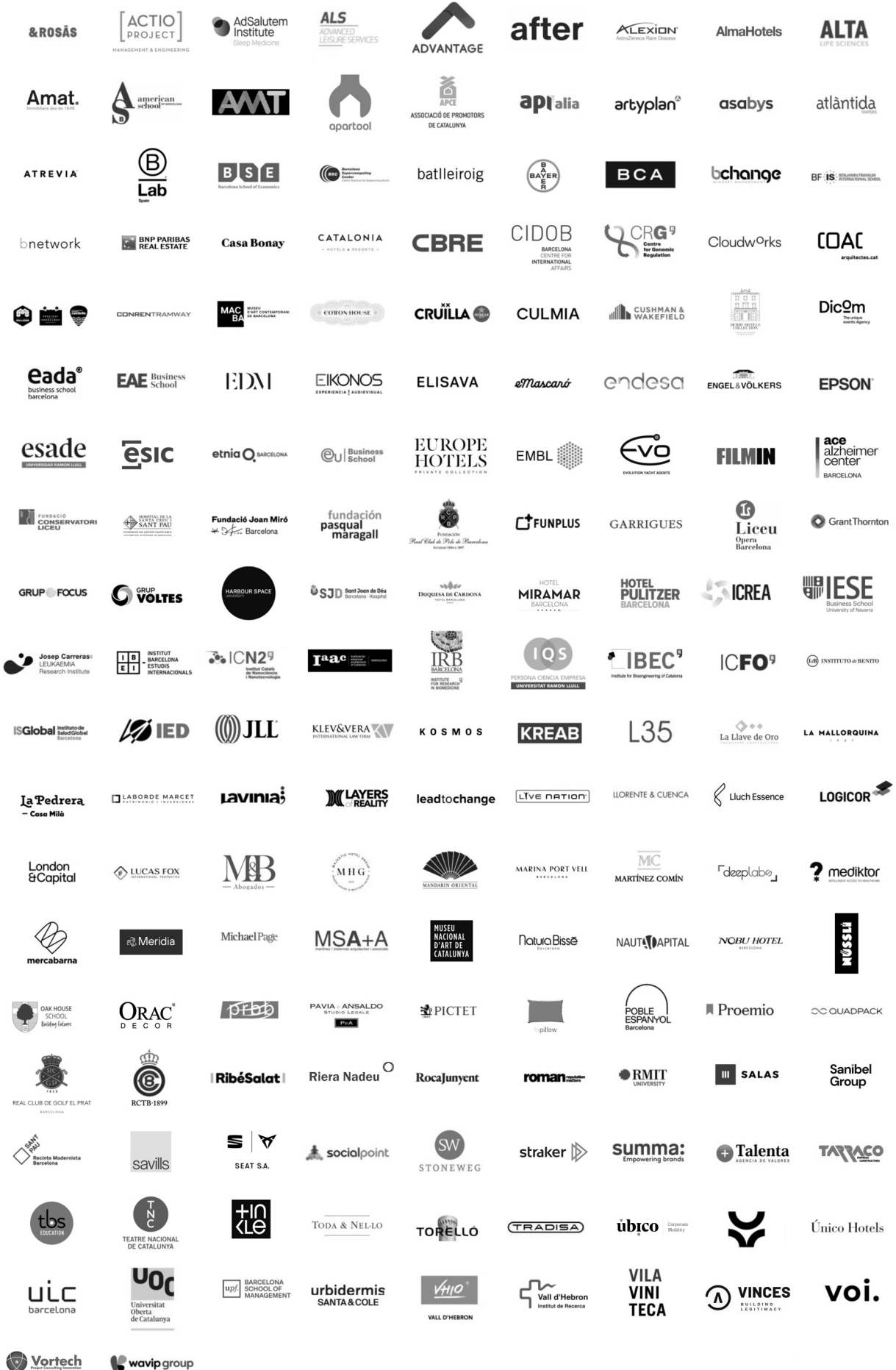
Federico Moscoso, Casa Bonay  
Fergus Dunn, Overactive Media  
Gema Galdon, Gema Galdon Hat Gallery  
Guendalina Perelli, GWEP Public & Media Relations  
Marko Daniel, Fundació Joan Miró  
Miryam Masdeu, UBICO  
Ariana Martín, Real Club Golf El Prat  
Tony Lara, Plus for Spain  
Joan Lim, Singapore Airlines



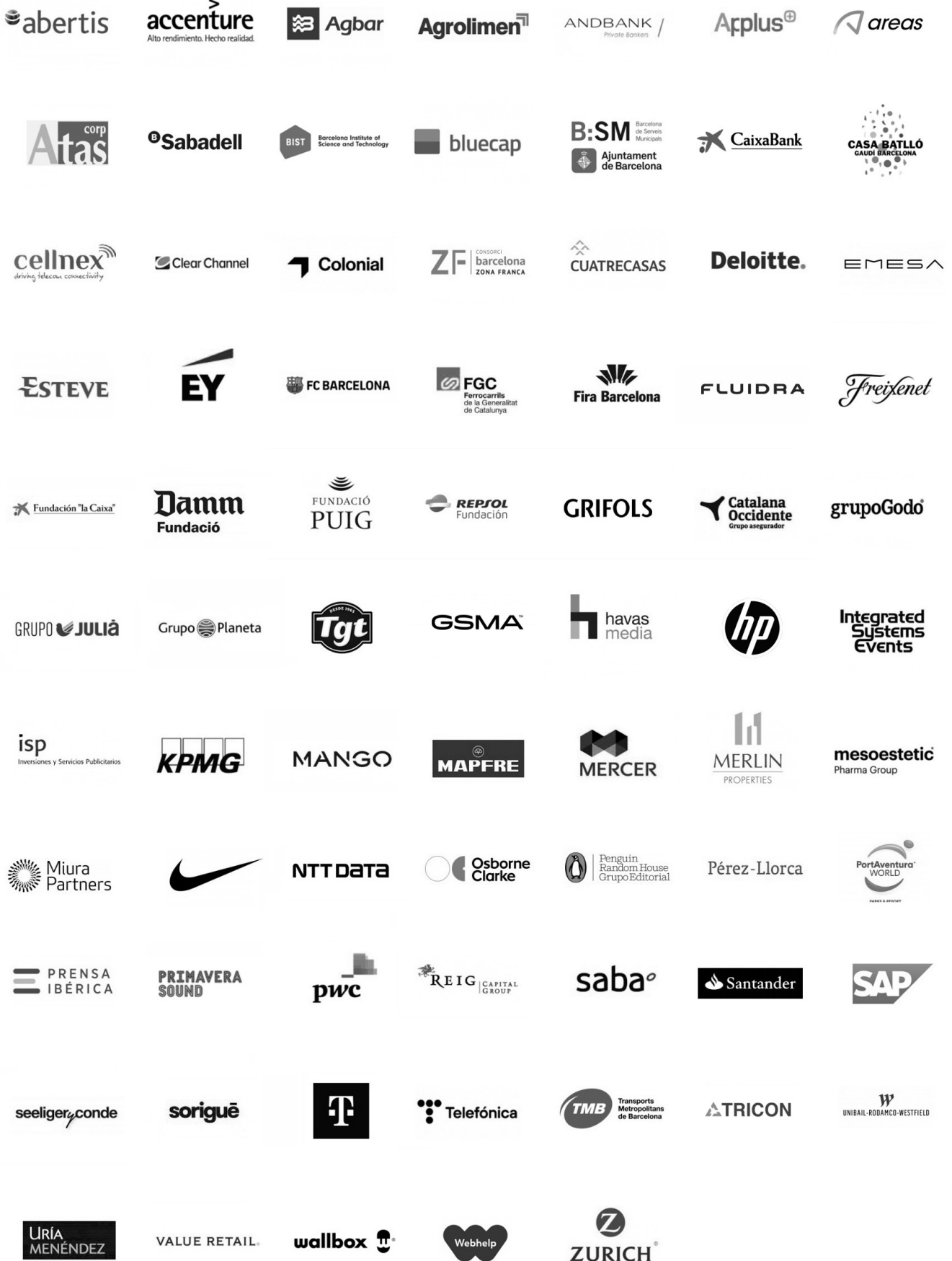




# Corporate Members



## Corporate Protector Members



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