

Gaming in Barcelona



A Programme by
Barcelona & Partners®



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01/ Introduction

Barcelona is a thriving tech hub. Highly skilled talent coupled with a solid and dynamic startup ecosystem make for a powerful digital environment.

Home to dynamic companies that leverage an innovative and creative environment, Barcelona is the ideal place to set up and expand business projects in the digital and gaming space.



02/ What makes Barcelona a great place for gaming companies

Over recent years, major gaming companies have chosen Barcelona as their headquarters for product, innovation, and creative development.

The access to highly talented, adaptive and creative professionals, as well as the ability to retain this talent, have fostered their development over the years.



/ International presence - multinationals

The most relevant companies in the gaming industry continue to choose Barcelona to house new product development, operations, and creative hubs for continental Europe, or even the world:



King was one of the early international video game developers to land in Barcelona in 2012.

Since then, this major mobile gaming firm has helped consolidate an ecosystem of other international companies that have also found in Catalonia, ideal environment in which to grow. In 2019, the company announced they would be moving offices to a 6,700 m² space, to house its 600 employees of over 45 nationalities.

"Barcelona has become a true hub for the video game industry. This means that there are many companies competing for the talent but at the same time, it also means that there are many highly skilled talents in the city."

Jan Wedekind,
Head of Central Intelligence and Analytics
at King



In 2019, Bandai Namco established a new office in Barcelona dedicated to the development of mobile games as well as commercialisation in the Western market.

The Japanese group Bandai Namco Entertainment, that specialises in the creation and commercialisation of videogames.

Under the name, Bandai Namco Mobile, the company stated Barcelona is a hotbed for international video game development and home to the best talent the mobile industry has to offer, and has opened an office space of 1,142 m².



UBISOFT

Barcelona and its innovative 22@ District is also home to global video game leader, Ubisoft.

After nearly a decade in the Catalan capital, the French company currently boasts 120 employees and continues to bet on the digital talent the city has to offer. Leveraging access to highly talented gaming and technology professionals, Ubisoft is regularly hiring in the city to support growth.

"Ubisoft Barcelona has always played a very important role in the industry, both in Spain and in Europe".

Javier Capel,
General Director Ubisoft Barcelona



Gameloft Barcelona, with offices a few blocks away from the Sagrada Família, currently boasts a team of 150 professionals such as artists, designers, programmers and music specialists.

In the city since 2006, Gameloft Barcelona is one of Gameloft's most vibrant studios, home of some of the most relevant gaming hits in their company. Their talented teams are specialised in creating blockbuster action games, powered by their amazing technology. Their most recent launches are the mobile gaming hits Despicable me: Minion Rush, Asphalt 8 Airborne and the recently released Asphalt 9: Legends.



In 2018, Chinese giant IGG (I Got Games) chose Barcelona as its headquarters for European operations and expansion.

The firm plans on growing their team in the city while overseeing markets such as the UK, France, Italy, Germany and Spain. With a turnover of \$667 million in 2019, IGG plans on conquering new European markets with the Catalan capital as its base.

According to Enric Cabestany, former European General Manager at IGG, Barcelona was chosen because **"The presence of other companies from the gaming industry, its tech ecosystem and the possibility of attracting local and international talent"**.



Leading independent mobile game developer and publisher, FunPlus also confirmed confidence in Barcelona's gaming ecosystem and talent, choosing to open its publishing office in the city in late 2019.

In less than 10 years, FunPlus has become one of the most significant companies in the gaming industry, generating over \$1 billion in revenue. Headquartered in China and Switzerland, the company aims to leverage the highly talented team of gaming and technology professionals located in the Barcelona region. Company growth is expected to continue through 2022 as FunPlus looks to expand its teams locally with a focus on the growth of marketing, community management and creative services.

FunPlus game, State of Survival, became the fastest-growing SLG mobile game in terms of overseas revenue 2020 when it surpassed \$80 million in monthly revenue after 17 months of release.

Presence of international tech companies in Barcelona

Videogames



Software



Hardware vendors



E-commerce



Services and Consulting



Telecommunications





Barcelona has gained ground as a pole of attraction for digital talent

/ A magnet for digital talent

Many factors have helped position the city as a hub of digital talent. The increase in the number of graduates, being an attractive hub for foreign professionals and a wide array of diverse companies looking for digital profiles and competitive salaries.

The availability of highly skilled talent, with a wide range of profiles, is one of the strengths of Barcelona's ecosystem.

Barcelona's digital talent is specialised in the areas of web development and mobile applications, UX / UI design and CRM and ERP consultants. These four specialties add up to more than 61,000 professionals, 73% of the city's technological talent.

Barcelona also stands out for its excellent higher education system.

With more than 1,050 degrees and masters and more than 265,000 university students (+30% are international), has one of Europe's highest student populations.

The Universitat Politècnica de Catalunya - BarcelonaTech (UPC) is among the top innovative universities in Europe. It is a leading university in the ICT field, with expertise in 5G, big data, cybersecurity, Internet of Things and quantum sciences.

/ 10th most attractive city in the world for digital talent and the 4th in Europe

/ 2nd European city with the highest numbers of software developers

/ 8th European City and the 21st world city for technology

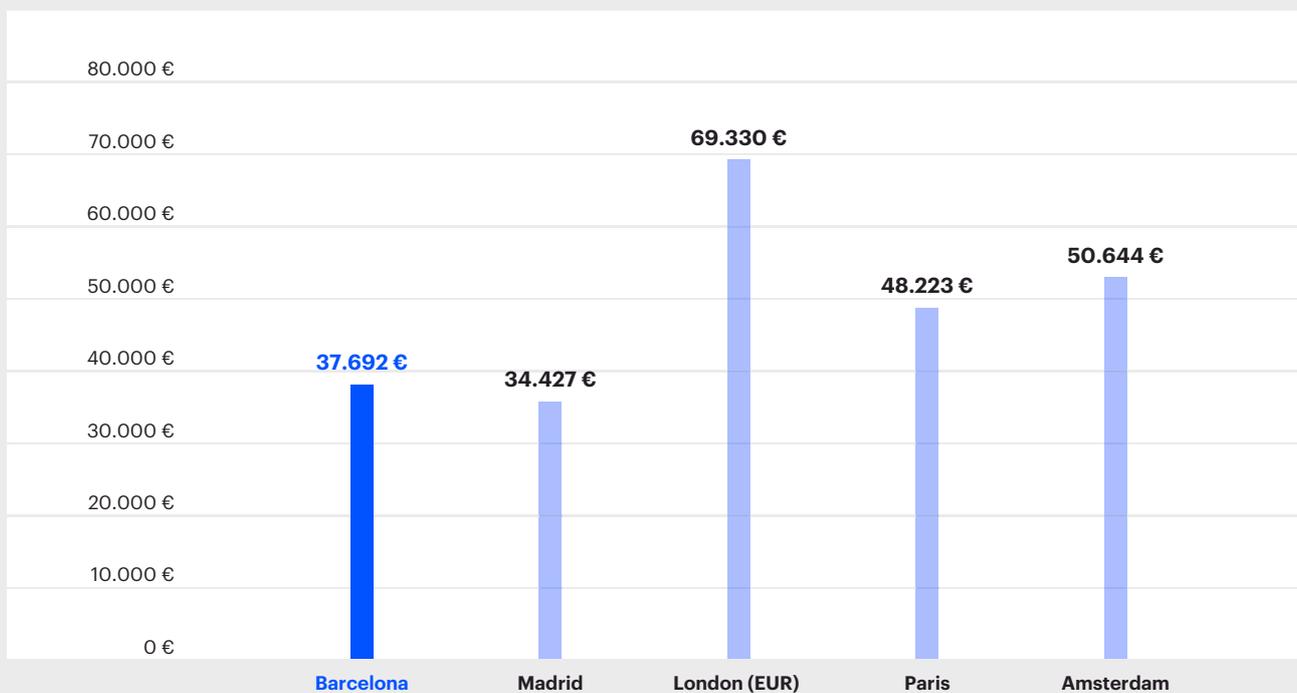
/ + 29% digital professionals come from abroad (11% come from London)

/ ICT sector:

- 129,000 jobs in Catalonia
- 16,700 companies with staff working in ICTs
- 19 Bn € turnover

Barcelona has more competitive digital salaries than other European cities like London and Amsterdam

/ Salaries of digital professionals by city 2020



Source: Digital Talent Overview 2021. Barcelona Digital Talent
 Source: The ICT Industry in Catalonia 2021. ACCIO
 Source: Barcelona. Your partner for a lifetime project, 2020. Barcelona Activa
 Source: Decoding the Digital Talent Challenge 2021. Boston Consulting Group

/ Creative heritage that enriches the local talent generation for artistic industries

Barcelona has a widely respected tradition in the animation industry. This tradition has propelled the city to have more presence of training workshops and more job offers compared to other European cities.

/ The city of Barcelona has a long tradition of welcoming geniuses and creators who have excelled in their respective disciplines. The city provides the right set conditions for the most creative and ground-breaking minds and individuals to flourish.

- **9,262 companies in the creative sector with 145,819 employees**
- **9th most cultural and creative city among European cities**
- **A long history of architectural innovation through the ages**
- **Barcelona second to Paris in the ranking of art venues per square mile**

Source: Cities over 1M inhabitants, Cultural and Creative Cities Index

/ The local universities are highly ranked internationally and provide from tailored programmes for the animation and videogame space, to any necessary discipline like business, marketing or technical skills. Different academies also offer training opportunities in the most sought-after job offers for the gaming industry.

- **2nd European city for Information and Technologies (IT) graduates**
- **3rd best university system in Europe**
- **4th European city in terms of number of creative employees**
- **First undergraduate degree in Gaming created in the 2013 (ENTI school), doubling the number of graduates in five years from 2015 to 2020**
- **56 undergraduate degrees and masters that focus on all the areas and skills of videogame development**

Source: Cultural and Creatives Cities Monitor, 2017

Source: The Times

Source: Cultural and Creatives Cities Monitor, 2019



Barcelona has an unparalleled startup culture and international community

/ Diverse, creative and talented startup ecosystem

The Barcelona startup scene is made up of a rapidly growing and constantly evolving community of talented, international professionals and forward-thinking companies. Entrepreneurs, both local and from abroad, thrive in Barcelona: yet another example of the city's innovative capacity.

This wide-ranging and active digital ecosystem full of networking possibilities has created one of Europe's leading startup cultures, undoubtedly fueled by the Barcelona Tech City, 4YFN, and the Mobile World Congress, but also due to the ease of attracting and maintaining young global digital talent.

/ Startup ecosystem key facts

/ 4th European city in investment rounds (2021)

/ 4th startup hub in Europe

/ + 1,900 startups (86.8% work with technologies linked to industry 4.0)

/ 4th European scaleups ecosystem

/ 2nd favourite EU startup hub of founders for setting up a startup

Source: Analysis of the Barcelona & Catalonia Startup Hub's 2021. ACCIÓ.

Barcelona is the birthplace of many startups that have become success stories and are gaining international recognition:



/ The powerful entrepreneurial ecosystem of Barcelona has caught the attention and interest of giant multinational companies such as Activision Blizzard, Take-Two interactive or Imperus.



ACTIVISION | BLIZZARD

Video Game giant, Activision Blizzard acquired Barcelona-based Digital Legends in October 2021 in the hopes of tapping into world-class mobile gaming talent and resources. Digital Legends is a pioneer in mobile game development. The studio has a long, established history as a leading mobile development studio with a number of high-quality mobile titles built from the ground-up to its credits, including the award winning The Respawnables™ series of games.

T2
TAKE-TWO
INTERACTIVE

Global gaming leader Take-Two moved into the mobile space by acquiring the Catalonia-based Social Point in early 2017. Similar to Take-Two (and Supercell and other successful mobile games companies), Social Point has been consistently profitable since 2013 and its revenues have grown 29% CAGR from 2013 through 2016.

IMPERUS

Imperus Technologies Corp. is a developer of social and mobile gaming for PC, Mac, iOS and Android platforms. It designs, develops and distributes its top ranked social casino-themed games within online social networks and mobile platforms. In 2015 Imperus acquired Akamon (later renamed to Tangelos games), the leading developer and operator of social casino games in the Spanish and Latin American markets. Tangelos games' portfolio of products range from traditional board games like checkers, dominoes or chinchón to slots and more gambling-like offerings.

/ A leading destination for technological investment

Barcelona is a global target for technological investment.

The ICT Industry led foreign investment in Barcelona in 2020 in terms of projects implemented.

/ Key Facts:

/ Barcelona has the 2nd best strategy in all of Europe to attract technological investments (Financial Times, 2020).

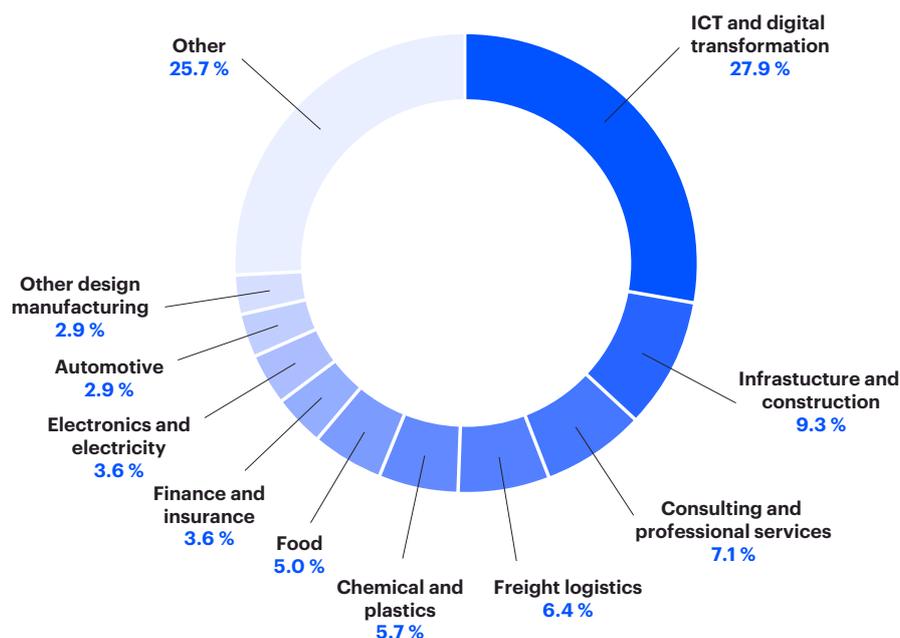
/ 60% of funding to Barcelona's startup ecosystem comes from international funds.

/ Barcelona ranks in the 7th position in the Top 20 European cities for capital invested in technology companies.

/ Catalonia (Capital: Barcelona) is the 7th region in Western Europe in terms of technological projects and ranks 5th for job creation and 8th in capital investment.

/ In 2020, the ICT sector attracted the most investment, with 27.9 % of all investment projects.

/ Main industries investment, 2020



/ What makes Barcelona a great place for gaming companies

Over recent years, major gaming companies have chosen Barcelona as their headquarters for product, innovation, and creative development.

The access to highly talented professionals, an adaptive and creative workforce as well as the ability to attract international talent to the city, has fostered their development over the years.

Barcelona boasts a unique set of qualities which create a unique environment where videogame companies can thrive. The city is also strategically placed in reach of business opportunities all over Europe and the world.



“Barcelona has a rich conglomerate of multinationals, big corporations, together with small, local companies that make it a rich ecosystem.”

Oriol Canudas,
VP and Head of Studio KING

03/ Barcelona: a great place for your business and for your employees

As well as a strong digital ecosystem and a commitment developing the sector in the city, there are many reasons to choose Barcelona:

/ A symbol of Mediterranean quality of life

Barcelona is considered to be one of the world's most appealing cities in which to live and work.

Barcelona's easy-going but cosmopolitan Mediterranean lifestyle provides the perfect backdrop for professional careers. This walkable and open-air city has a European cultural offer second to none in all aspects, from cuisine to performing arts, while its melting pot of nationalities establish a welcoming atmosphere for all newcomers.

/ 8th most attractive city in the world to live and work in

- + 30 km of beachfront**
- + 2,500 hours of sunshine a year**
- + 200 km of bicycle lines**
- + 8,600 foreign companies operating**
- / + 11,000 architectural spaces**
- / + 60 parks and + 1,900 public sports spaces**
- / 67 museums**

Source: Barcelona. Your partner for a lifetime project, 2020. Barcelona Activa

/ A City of science and knowledge

With one of Europe's largest higher education student populations and international campuses of excellence, Barcelona is a hive of talent. A strong research tradition, often focused on emerging sectors such as biotechnology, new and renewable energies or advanced materials to mention just a few, means that talent also grows solidly here.

/ 5th city in scientific production in Europe and 23rd Worldwide

- + 265,000 university students**
- + 50,000 master's and doctoral students at the Barcelona region's universities**
- + 30 % of postgraduate's students are international**
- + 500 master's degrees on offer**
- + 40 research institutions**

Source: Barcelona. Your partner for a lifetime project, 2020. Barcelona Activa



/ A powerhouse for European dynamic industry

Catalonia, whose capital is Barcelona, is one of Europe's four leading industrial regions, pioneering the continent's productive capacity in areas ranging from textile to automobile.

Today, it's dynamic and internationalized export economy means Barcelona is one of Europe's most attractive cities for foreign investment.

The industrial activity represents 19.3% of the Catalan GDP and employs more than 500,000 people.

The industrial sector in the Barcelona region is characterized by being highly diversified with the following main branches:

- / Automotive**
- / Pharma & Biotechnology**
- / Food & Beverages**
- / Fashion Retailers**
- / Telecommunications**
- / Energy & Utilities**

Source: Eurostat 2018

/ A strategic location

Barcelona is located in a strategic geographical point that positions it as an accessible and well-connected city.

Barcelona has easy access to very dynamic large markets: the EU's common market, which provides access to 510 million people.

- / 6th busiest airport in Europe by passenger traffic**
- / Barcelona's Ports located among the TOP 10 in Europe with the highest container traffic**
- / 4th city in the world in the number of congresses (2019). Mobile World Capital - 5G HUB**

Source: Barcelona. Data Sheet 2020. Barcelona Activa Source: ICCA

/ A highly competitive city

Barcelona offers an unparalleled balance between quality of life, talent and cost structure.

Barcelona's European and global investment attraction is heightened thanks to a favorable mix of factors; where the local innovation culture, its strong industrial base and qualified professionals are all complemented by highly competitive prices in terms of salaries, office space and service providers.

Office and industrial rental prices are competitive, compared to other European cities. Barcelona remains in the middle band, with prices well below those of other major cities.

Barcelona has more competitive digital salaries than other European cities, accounting for approximately half of the salaries in the digital hubs of London and Amsterdam.

/ Cost of living index, 2021

Relative indicator of consumer goods prices, including groceries, restaurants, transportation and utilities, including accommodation expenses such as rent or mortgage.



04/ Barcelona & Partners

/ We are a non-profit investment agency focused on attracting selected companies and initiatives to Barcelona, the gateway to Europe.

/ We help impactful business with exponential growth to establish to Barcelona.

**At Barcelona & Partners
we contribute to the
success of your
investment project
and its landing in
Barcelona**



At Barcelona & Partners we carefully listen to your growth plans

/ With you, we analyse how our research ecosystems, private corporations and local and European funding instruments can be a trigger for your decision

We collaborate with you in three steps:

01/ Opportunity Definition

We help you to consider Barcelona as the place to be.

You share with us your goals, your expansion plans and your needs.

We prepare a draft of the possible scenarios to analyze and how the BP value proposition can help you make the decision.

At the first stage of our relationship, we want to help you navigate through the value proposition of our city, understanding its full potential.

We can also help by defining the opportunity: from the analysis of your business objectives to the draft of feasible scenarios.

02/ Project Definition

We collaborate with you in defining the project.

We understand the importance of a corporate investment operation.

We are willing to support in key aspects of the project definition phase:

- Screening of partnership opportunities with local ecosystem
- Financing facilities
- Location analysis

03/ Project Building

We support you in the execution of your landing project.

- Access to a project specific key account manager
- Liaison with business landing agencies
- Advice on developing public and private partnerships
- Enablement of quality service providers
- Support in sourcing and recruiting top talent

We are financially backed by major corporations and public institutions, working together in attracting companies to Barcelona

/ Private Partners



/ Public Partners



* Pending to be executed



05/ Contact us

**Tell us more about
your project or initiative.**

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contact us.**

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