

# CATALONIA: THE PLACE FOR BUSINESS SUCCESS

Florence, 23rd November 2011



**Generalitat  
de Catalunya**

**invest**  
IN CATALONIA



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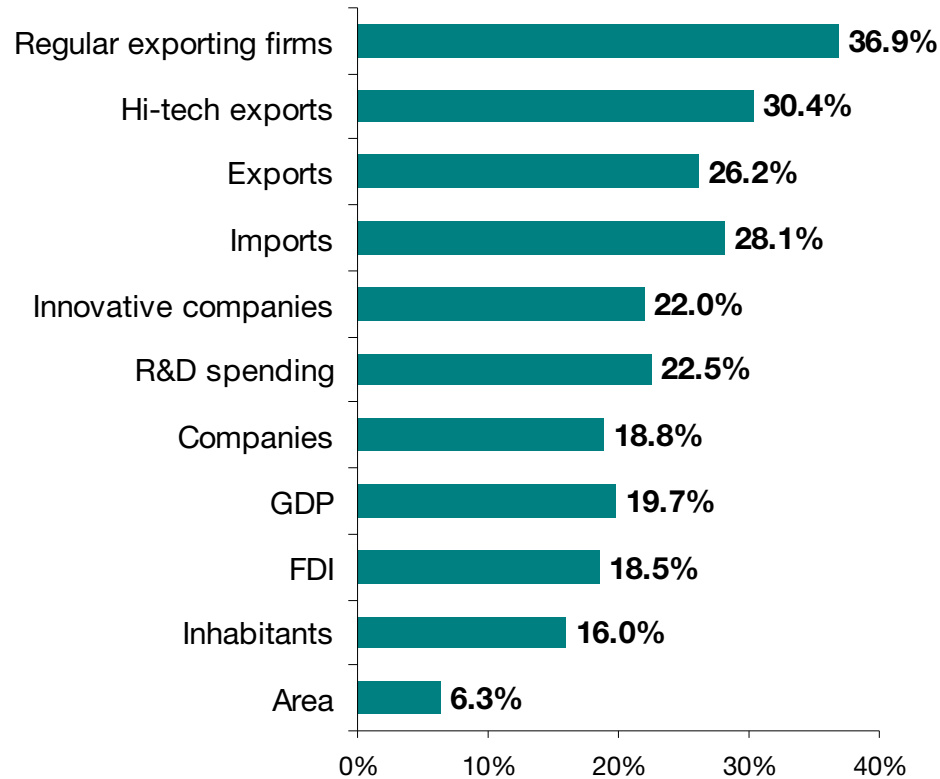
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**1. CATALONIA IN  
FIGURES**



Catalonia within Spain



With an **area of 32,106** square kilometres, Catalonia represents only **6.3%** of the Spanish territory.

With a population of **7.5 million**, Catalonia represents **16%** of the total Spanish population.

But the weight of the Catalan **economy** is much greater:



**16%**  
Population of Spain



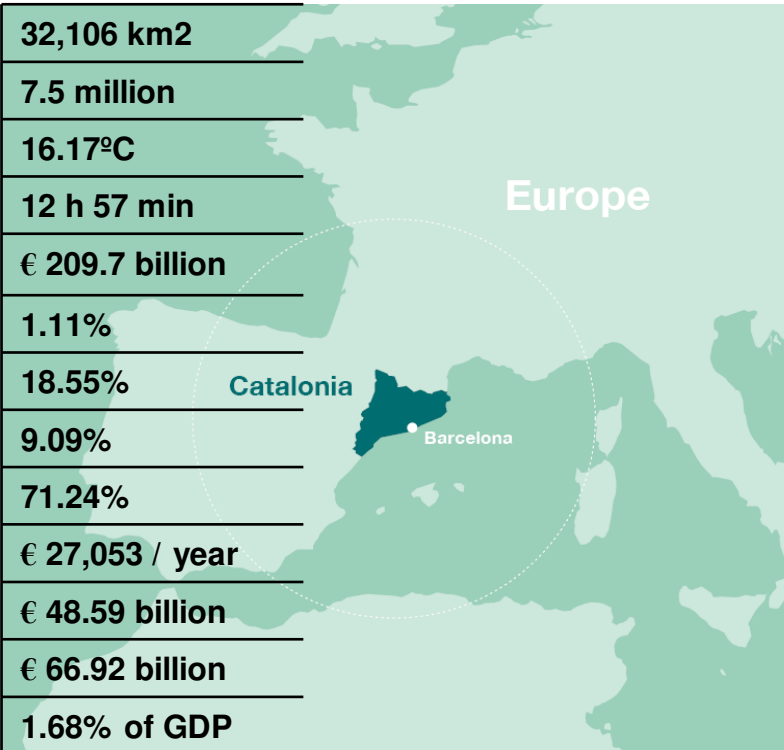
**20%**  
Gross Domestic Product



**30%**  
of Spain's Exports

### Some Basic Figures

Area	32,106 km <sup>2</sup>
Population	7.5 million
Average temperature	16.17°C
Average hours of daylight	12 h 57 min
GDP mp 2010	€ 209.7 billion
Agriculture (GAV 2010)	1.11%
Industry (GAV 2010)	18.55%
Construction (GAV 2010)	9.09%
Services (GAV 2010)	71.24%
GDP per capita 2010	€ 27,053 / year
Exports 2010	€ 48.59 billion
Imports 2010	€ 66.92 billion
R&D spending 2009	1.68% of GDP



Catalonia's **population** is similar to those of countries like Bulgaria and Austria. Its **GDP** is greater than Denmark's and Finland's and similar to that of Austria.

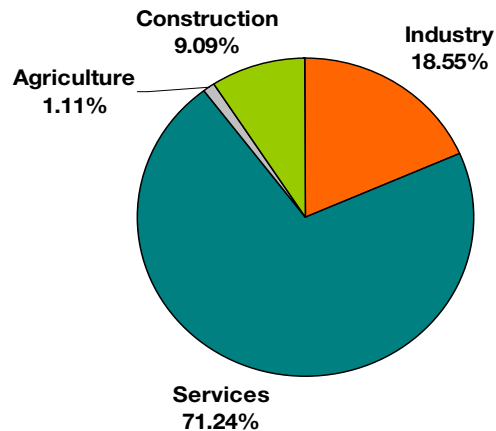
It **exports** more than Portugal and the Slovak Republic and about as much as Finland and Hungary.

At €27,053 / year, Catalan **GDP per capita** is 14% above the European average (EU-27) and above those of United Kingdom and Italy.

Source: IDESCAT, INE and the Ministry of the Economy.

Balance of Industry and Services

**Catalan GAV by subsector, 2010**  
**GAV 2010: €192.72 billion**



Source: Invest in Catalonia, based on data provided by INE.

✓ **Diversification of production** has a clear effect in terms of competition, given that the extensive portfolio of suppliers guarantees the supply of materials at very competitive prices, thus ensuring the efficiency of Catalan production.

✓ In the **services** sector, company-oriented services occupy an important position in Catalonia and open up a wide range of possibilities for services companies.

**Industrial Industries**

- Machinery
- Chemicals
- Pharmaceuticals
- Packaging
- Electronics
- Transport material
- Food and beverages
- Paper and printing

**Service Industries**

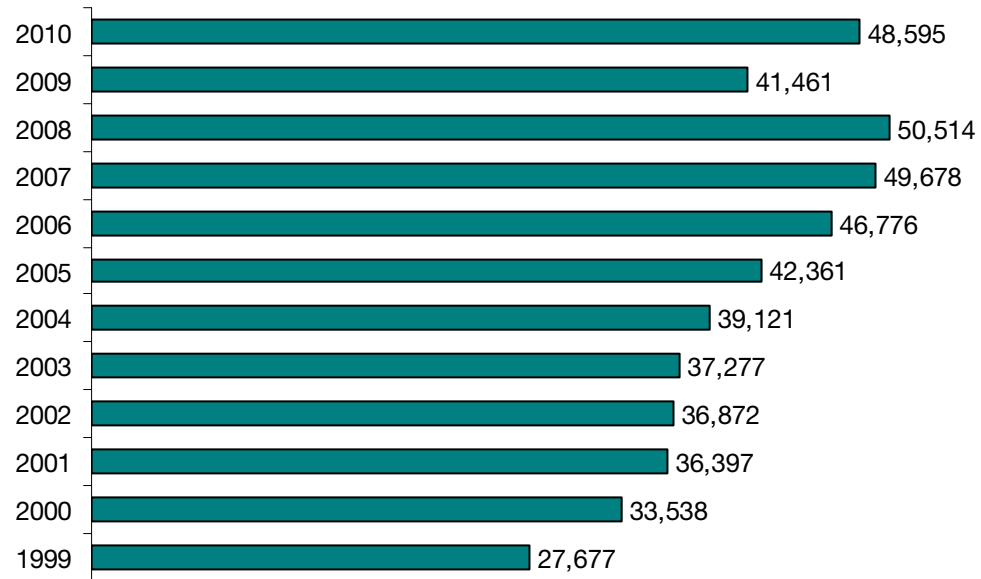
- Trade
- Tourism
- R&D
- Design
- Engineering
- ICTs
- Health
- Audiovisual and the media
- Shared services centres
- Logistics

**New Industries**

- Biotechnology
- Med Tech
- Renewable energies
- Recycling industries
- Nanotechnology

International and Globalized

**Catalan exports (millions of euros)**



Source: Invest in Catalonia based on data provided by ICEX-ESTACOM.

**Foreign Direct Investment received**

Year	Foreign Direct Investment received (billions of euros)
2000	4.89
2001	5.43
2002	3.00
2003	2.68
2004	4.07
2005	3.12
2006	3.04
2007	2.75
2008	3.36
2009	1.76
2010	4.52

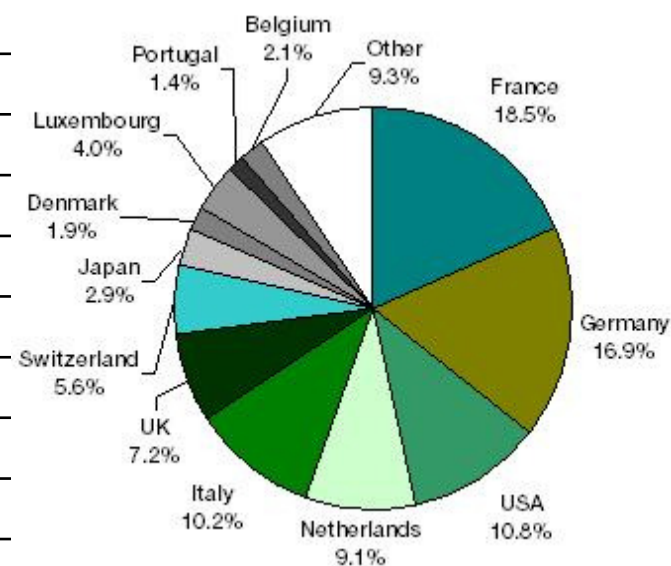
Source:  
DataInVex.  
Investment  
Statistics. Ministry  
for Industry,  
Tourism and  
Commerce.

- 34% of all Spanish exporting businesses are located in Catalonia (36.841 in 2009, 7% growth rate)
- 75% of exports go to EU markets.
- 60% of imports come from EU countries.
- 10% of total Spanish FDI inflows come to Catalonia.
- 51% of Catalan FDI inflows are industrial.

Foreign Investment to Catalonia  
comes from different countries

Country of origin	Companies established in Catalonia	Country of origin	Companies established in Catalonia
France	626	Sweden	49
Germany	572	Portugal	48
USA	366	Austria	48
Netherlands	307	Canada	25
Italy	<b>346</b>	Ireland	24
UK	245	Finland	17
Switzerland	188	Norway	17
Luxembourg	135	Hong Kong	15
Japan	98	Andorra	14
Belgium	70	Other	106
Denmark	65	<b>TOTAL</b>	<b>3.381</b>

Foreign companies operating in Catalonia by country of origin



Source: Invest in Catalonia based on Infoma data  
Data include foreign companies, owned 50% or more by foreign capital.



Foreign Companies in Catalonia

Catalonia is home to ...

- 52.8% of the Italian companies
- 71.4% of the Japanese companies
- 47.5% of the French companies
- 33.5% of the German companies
- 41.2% of the USA companies
- 22.8% of the British companies
- 59.2% of the Danish companies
- 22.8% of the Belgian companies
- 46.8% of the Canadian companies

... operating in Spain.

- Catalonia is an excellent location for foreign investment
- 31% of foreign companies in Spain are located in Catalonia

Nearly



**3,400** international  
companies  
operate in Catalonia\*

\* Companies with over 50% of foreign capital

- Access to key markets in Europe and the Mediterranean
- Almost 500 million consumers in a 2-hour flight radius



# invest IN CATALONIA

## State of the art Infrastructures



- **International Airport of Barcelona**
- **Additional Airports in Reus, Girona and Lleida**



- **Port of Barcelona:** One of the main ports in Southern Europe and the top cruise-ship destination on the Mediterranean.
- **Port of Tarragona:** Largest port in Southern Europe for chemical products.



- **High-speed passenger trains** take just 2½ hours to get to Madrid. The train to the French border will open in 2012.



- Catalonia is well connected to the European **motorway and rail network.**

# invest IN CATALONIA

A region of Creativity, Talent and Excellence

## Architecture



## Olympics



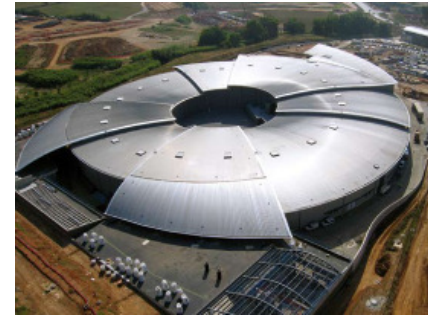
## Cuisine



## Arts



## Research



## Fashion and Design



## Sports





**invest**  
IN CATALONIA

With an Outstanding Quality of  
Life



**“Barcelona has consolidated its position as the best city in Europe in terms of quality of life since 1996”**

*Cushman & Wakefield, 2011*



# invest IN CATALONIA

With an Outstanding Quality of  
Life thanks to...



## Mediterranean Climate

With 2, 590 hours of sunshine every year and average temperatures between 12° and 21°, Catalonia is a land rich and varied. The coastal zone, inland valleys and mountains make it possible to enjoy **outdoor activities** all year round

## History and culture

Catalonia boasts an **extensive cultural and historical heritage** that covers the gamut from Greek and Roman to Modernism and the architecture of Gaudí, with several **UNESCO World Heritage Sites**.

## Leisure possibilities

A safe, pleasant street life with **a wide range of activities**, such as sport events, music festivals, cultural exhibitions and traditional folklore makes Catalonia attractive for qualified professionals and students from all over the world.

## Long life-expectancy

Catalans are among the longest-living people in the world. Their secret is a combination of good environmental conditions, a **healthy diet and good social services**. According to different WHO indicators, the Spanish healthcare system it is among the top seven in the world.



*La Rambla*



*Boí*



*Sagrada Família*



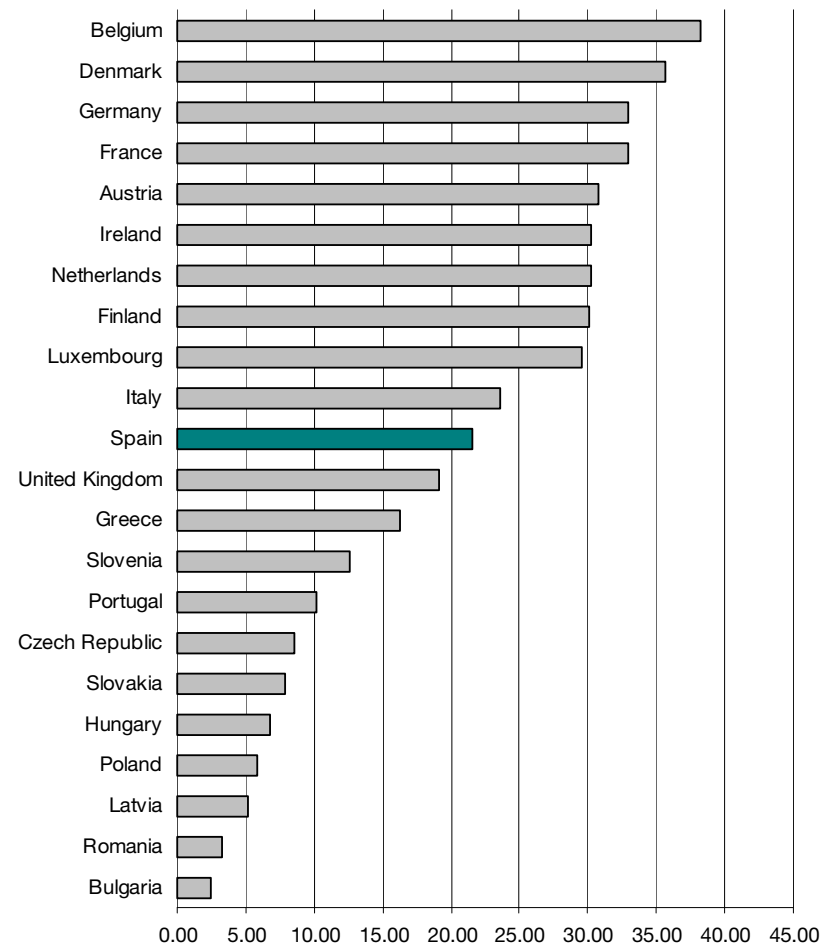
*Circuit de Catalunya in Montmeló*



*FC Barcelona Stadium*

- ➔ Spain has a high productive workforce and competitive costs in the industry sectors
  
- ➔ Catalonia, offers one of the best talent pools in Europe:
  - 12 Universities
  - Two world-class business schools
  - Capacity to attract international talent

**Average hourly labor costs**



Source: EUROSTAT, Hourly labor costs, 2009.

Data in Euros. Data for Finland, Italy and the Netherlands corresponding to 2008.



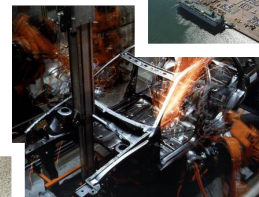
**Thanks to...**

- **Country: Excellent Quality of Life in a Strategic Location**
- **Business: A Dynamic Economy**
- **People: Talent, Creativity and Qualifications**
- **Pro business Government**

**Catalonia is the ideal location for the establishment of:**

Innovation and R&D

Regional Headquarters



Marketing and Sales Operations and Customer Support Centers

Logistics

Manufacturing

Design Centers





## 2. ABOUT INVEST IN CATALONIA

Who we are and what we do

**Invest in Catalonia** is the Catalan government organization in charge of attracting foreign investment.

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We are a **multidisciplinary team** that works to **attract and maintain** business investments.

**Our aim** is to ensure that these investments are economically and technologically sound, and generate wealth and stable, quality employment over the long term in Catalonia.

We use a decisive **pro-business approach** based on the principle of **confidentiality and providing a free service**. We are a **public** organization offering **tailor-made solutions** to help you implement your investment in Catalonia.

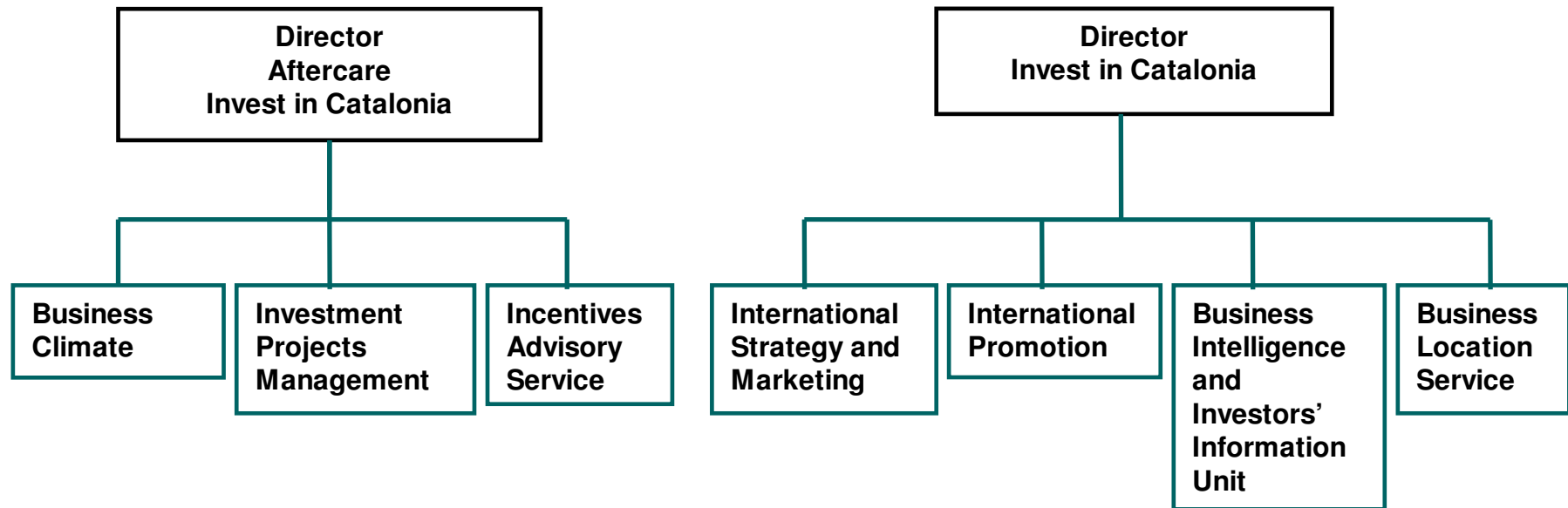


**Who we target**


- ✓ Foreign companies with no presence in Catalonia.
- ✓ Foreign companies already located in Catalonia.
- ✓ Other medium-sized and large companies with investment projects.



Our Structure



Target Markets

- 
- China
  - Emerging countries
  - Europe and Germany
  - North America
  - Japan / Korea / Singapore





**Target Sectors**

- Biotec
- Cleantech
- Chemical
- Electric motorcycle
- Food Sector
- Green vehicle
- Shared Services Centres
- ITC
- Logistics centres
- Med Tech
- Mobile World Capital
- Renewable Energies





## 3. OUR SERVICES







**Our services**

Is your company thinking about the possibility of investing in Catalonia?

**Information**  
for foreign companies

Do you have a investment project to do business in Catalonia?

**One-stop shop**  
for investment projects

Are you looking for a location for your business project?

**Finding a business location**  
service

Do you need information on available incentive programmes?

**Incentive advice**  
service

Is your company already set up in Catalonia?

**Aftercare**  
for companies with activity in Catalonia

Do you regularly work with foreign companies as clients?

**Public-Private Partnership**



**Information for foreign firms**

We can provide you with **practical, up-to-date information** about investing in Catalonia.

- ✓ Basic information on the socioeconomic context.
- ✓ Information on how to set up in Catalonia: legal, tax and labour framework.
- ✓ Information on specific sectors.
- ✓ Information on investment opportunities in Catalonia



## Attracting and managing investment projects

We save you time and money by being a **one-stop shop** for your investment project and your single point of contact with the public administration.

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- ✓ Structured, up-to-date information on key factors for the success of your investment project.
- ✓ Accompaniment in all phases of project management, from the very beginning to final implementation.
- ✓ We are facilitators and provide advice to help investment projects move forward while guaranteeing technical and legal feasibility.
- ✓ We help find the best location to meet your needs.
- ✓ Advice on incentive programmes and financing options for your project.
- ✓ We help generate media coverage to make people aware of your investment.

Success stories



Support in the management of a project to expand the Cornellà del Terri plant. Investment of €16 million and creation of 100 new jobs.



Advice for the German multinational on starting up in Catalonia the first R&D centre in Spain for adhesives for materials such as metal.



Support in the management of the project to expand the Shared Services Centre for companies in Sant Fruitós de Bages.

160

business investment projects attracted in the last 5 years that have involved investments of:

€ 1.6

billion

and have created:

13,000

jobs

Finding a business location

If you are looking for a **location for your investment project**, we offer:

- ✓ Information on industrial buildings, land, office space and logistics centres throughout Catalonia.
- ✓ Completely objective advice to help you find the best location for your business.
- ✓ Visiting arrangements and contacts with all public and private real estate agents on the market.

30%

of the investment projects managed by Invest in Catalonia have involved providing advice on finding a business location.



Incentive advisory service

We identify **tailor-made assistance and financing** for your investment project.

- ✓ Specific information on incentives and financing options in Catalonia from the Catalan government and other public administrations (local, national, European, etc.).
- ✓ Advice on finding the best way to finance your company's investment projects.
- ✓ Accompaniment when presenting projects to responsible organizations, as well as subsequent applications and negotiations.

50%

of the investment projects managed by Invest in Catalonia have involved providing advice on incentives.



**Aftercare**

**Ongoing support** for foreign companies operating in Catalonia:

- ✓ The process of setting up.
- ✓ Information on opportunities and advice on new investments.
- ✓ Intermediation with the public administration and public organizations to speed up administrative procedures.
- ✓ Strategic facilitators: we lobby the public administration for you.



**190**

company consultations  
handled each year

**730**

foreign companies visited in  
the last 5 years

## Public-Private Partnership

If your **public or private organization** works regularly with foreign companies as clients, we propose the following:

- ✓ Creating a public-private partnership to manage a business investment project to guarantee its success.
- ✓ Institutional support for your projects.
- ✓ Collaboration on promotion action for Catalonia.



**20%**

of the investment projects attracted each year are the result of collaboration between organizations and companies like yours.

- ✓ Consulates and foreign trade offices in Catalonia
- ✓ Foreign chambers of commerce
- ✓ Business and industry associations
- ✓ Law firms
- ✓ Consultancies



## 4. OUR RESULTS



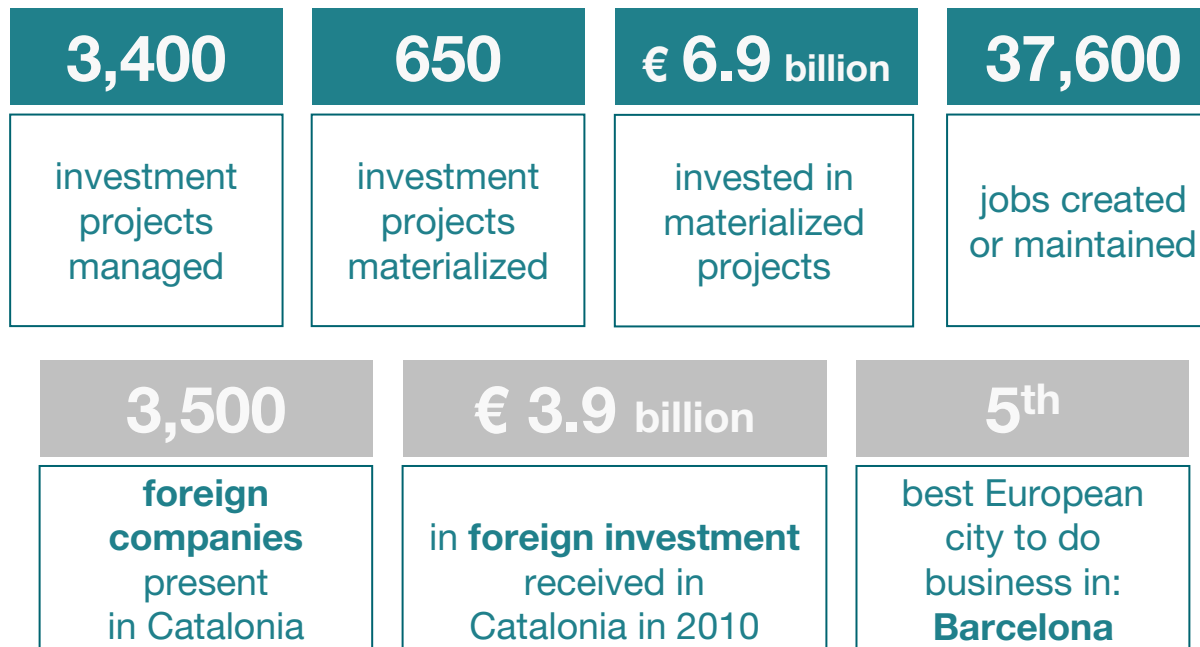
The background of the slide features a light teal color with a network diagram of interconnected nodes and lines. In the foreground, three semi-transparent globes are arranged horizontally, showing different continents.



Since 1985

Invest in Catalonia offers **experience** and a service you can **trust**.

Created in **1985**, it was the first organization responsible for attracting foreign investment in Spain. A lot has happened since then:



Some of the companies we have advised



**DENSO** Europe



**ALSTOM**



**SIEMENS**



**aleo**



**medela**

**soGEFI**

**P&G**



**COLT**

**brose**  
Technik für Automobile

**Alcon**

**GRUP SERHS**

**BASF**  
The Chemical Company



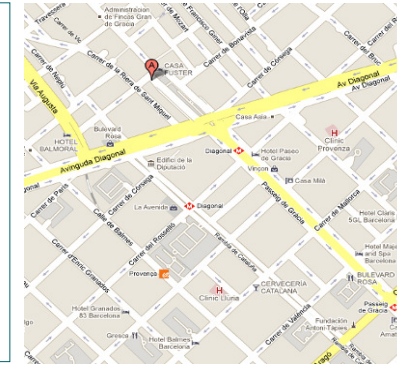
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- Brussel·les
- Budapest
- Buenos Aires
- Casablanca
- Copenague
- Dubai
- El Caire
- Hong Kong
- Istanbul
- Johanesburg
- Lisboa
- Londres
- Madrid
- Mèxic
- Miami

**34 Centres de Promoció de Negocis  
d'ACCÍÓ al món:**



- Milà
- Montreal
- Moscou
- Nova Delhi
- Nova York
- París
- Praga
- Santiago de Xile
- Sao Paulo
- Sidney
- Silicon Valley
- Singapur
- Stuttgart
- Tòquio
- Varsòvia
- Washington
- Xangai

**GRAZIE MILLE!**

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