

Catalonia Connects to Video Games

An innovative industry with global vision and one of the most dynamic sectors in the digital content field.

More than 120 companies in the Catalan gaming ecosystem

There are more than 120 video game companies established in Catalonia (25% of the Spanish total), with 1,687 employees (38% of Spain) and a €217M turnover (42.5 of Spain), 72% coming from international markets. The boom in games for mobiles and the digital distribution have helped new companies to emerge. Most companies are less than 10 years (85%). In 2015, Catalan companies developed about 150 games, 40% for mobiles and 30% for online platforms.

Barcelona, entrepreneurial spirit

Barcelona is recognized as the best technological ecosystem in Southern Europe and some of the companies born here are known for their growth potential. The city is Western Europe's most attractive metropolitan area for investment (Site selection), and a global benchmark for smart and mobile cities (Second Smart City in the World).

Catalonia concentrates more than 1,200 startups. With startups being one of the strongest employment and income creators in Europe, Barcelona is the 5th Startup Region in Europe according to Compass and ACCIÓ, behind London, Paris, Berlin and Amsterdam. The CITIE 2015 report lists Barcelona as the 4th Best city favoring digital entrepreneurship. Furthermore, the Catalan capital ranks extremely well in terms of cost of living & best location for office space costs.

Foreign capital investment

In the last 5 years, Catalonia has been the 3rd Continental European region in FDI job creation in the video game industry, with a total of 450 employees (fDi Markets). In the same period, Catalonia has been the 5th Continental European region in FDI projects in video game, that represents a Capex of 26M€. National and international video game companies have invested in Catalonia, from local young entrepreneurs that have ended acquired, such as Social Point or Akamon, to big multinational companies, such as Activision King or Ubisoft.

The Catalan video game industry is largely young and international:

Several video game companies have been created or operate in Catalonia. Among them, Social Point (acquired by the US Take-Two), Activision Blizzard, Ubisoft, Gameloft, Tangelo Games, Digital Legends, Novarama, Bee Square, Kerad Games, BlitWorks, U-Play Online, Abylight, BCNmultimedia, Game Troopers, Moonbite or Macflai Games





Why is Catalonia the best place for the Gaming Industry?

With an open business mindset, attracting and supporting business, Catalonia offers excellent investment opportunities for the establishment of R&D centers in game programming, HQ & sales offices, and strong growth trends that may offer additional business opportunities in some fields such as porting and gamification activities.

- ▶ There is a significant **video game ecosystem** in Barcelona & Catalonia, being the most important video game hub in Spain, and one of the biggest in Europe, growing at a double-digit pace last years.
- ▶ Having a **strategic location and access to markets**, Barcelona is one of Southern Europe's few cities with full-modal transport connected to the European network (port, airport, motorways and high-speed railway) within a 12-km radius, each with global connectivity.
- ▶ Barcelona is a pool of local and international **young, creative and qualified professionals** and researchers. Catalonia has a wide offer of specialized video game training programs and a high standard of living and quality of life. In addition, labor costs are the most competitive for the video game industry (fDi Benchmark, 2017, among 7 top European cities). In Catalonia, 7 universities offer ICT studies, and almost 800 students are enrolled in a wide offer of specialized **video game training programs** that range from videogame creation, design and development or arts, design, 3d, games, animation and visual effects to multimedia engineering or interactive digital content.

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- ▶ **Barcelona** outstands for its **creativity & entrepreneurship**, being considered in 2016 the most emerging creative city in the world (BCD).
- ▶ Catalonia is a top **R&D hub** having leading scientific facilities, a strong digital business cluster in Barcelona and being the 3rd Western European destination for foreign investment projects in R&D (fDI Markets, 2011-2016).
- ▶ Barcelona is the **Mobile World Capital**, that turns Barcelona into the permanent global centre for **mobile technologies**. The city also hosts international trade fairs & events as the Mobile World Congress, which receives more than 100,000 visitors, Gamelab Barcelona and Barcelona Games World and platforms such as ESL Competitions.

Five video game trends that generate new business opportunities in Catalonia

Virtual reality, the technology based on the creation of an immersive environment using a powerful hardware and software, which produce interactive images and sound.

eSports, a group of electronic sports organized as a competition in which professionals compete against each other.

Cloud gaming, a new way to organize how video games are executed, played and distributed; using a central server for the game processing and streaming the image to a wide assortment of hardware.

Game porting, when a video game is designed to run on one platform is converted to run on a different platform.

Gamification, the application of game-design elements and game principles in non-game contexts