Tech Hubs Overview 2025

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ACCIÓ - Catalonia Trade & Investment is the Catalan Government agency which drives the growth of Catalan companies by promoting innovation, international expansion, and business strategy. The agency offers them support to carry out R&D projects, green and technological transformation, and in processes for internationalization and opening up subsidiaries abroad. With a team of 500 professionals and 40 offices around the world, ACCIÓ - Catalonia Trade & Investment is also tasked with attracting foreign investment to Catalonia and helping companies generate a positive impact on the environment.

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Executive Summary

The third edition of the Tech Hubs Overview examines the evolution of foreign-owned technology hubs in Catalonia. With updated data from 2024, the report evaluates the region's ability to attract tech investment and talent while strengthening its position as a hub for innovation and development.

This edition introduces a more detailed analysis of workforce composition and the evolution of tech hubs since their inception. Overall, the findings indicate that the ecosystem is in a consolidation phase, showing steady growth and a significant economic impact on the region.

An expanding ecosystem: 160 tech hubs generating €2,879 million

As of 2024, there are 160 active tech hubs in Catalonia, contributing a total economic impact of €2,879 million — **an average of €18 million per hub**. The key factors attracting these hubs include a highly skilled talent pool, the prior presence of the parent company, and quality of life. Notably, local talent has become an increasingly decisive factor in recent years.

13 new tech hubs established in Catalonia in 2024, driven by a thriving tech ecosystem

13 new tech hubs emerged in 2024, generating 263 highly skilled jobs and nearly €22 million in economic impact. These new foreign investments come from countries such as Germany, the United States, China, Brazil, the United Kingdom, the Netherlands, and Japan.

Steady growth: tech hubs create 6,191 jobs in 2024

In total, **Catalonia's tech hubs employ 34,869 people**—22% more than the previous year. Looking ahead, survey respondents expect the workforce to reach 42,752 employees by 2026.

In 2024 alone, 6,191 new jobs were created. The average hub size has increased to 235 employees, reflecting strong growth compared to 2023 and 2022, when the average was 207 and 168 employees, respectively.

Health and Tech Product Development: the fastest-growing sectors in 2024

In 2024, the fastest-growing sectors in both the number of hubs and employment were health and tech product development. Together, they accounted for 43% of new jobs created—nearly 2,700 positions.

Software Engineers lead the list of most in-demand tech roles

Catalonia's strong talent pool remains a key driver in attracting tech hubs. The most sought-after professionals include software engineers, consultants, cybersecurity analysts, SAP specialists, data analysts, and video game developers.

Artificial Intelligence among the key technologies developed by tech hubs

The most prominent technologies within Catalonia's tech hubs are those related to software development, enhancing application design, functionality, and user experience. Additionally, deep tech plays a significant role, with 70% of hubs actively developing such technologies—especially artificial intelligence.

High-value tech hubs: decision-making and strategic roles

Catalonia's combination of skilled talent and tech expertise has positioned its hubs as key players within their parent companies. Nearly 70% of hubs in the region handle both operational and strategic decision-making functions. Additionally, 71% provide services beyond Europe, solidifying their status as critical reference centers for their respective companies.

Strong commitment to sustainability

Sustainability is a growing priority: 80% of tech hubs in Catalonia have implemented social and environmental responsibility initiatives, reflecting a shift toward more sustainable and community-focused business models.

Future challenges: talent retention and gender equity

Despite the positive evolution of the ecosystem, challenges remain to ensure sustained growth. Talent attraction and retention have emerged as key concerns, with the cost of living and housing access potentially affecting the ability to attract top professionals.

At the same time, gender diversity remains an area for improvement within the tech sector. Currently, women make up 30.4% of the total workforce in tech hubs, while only 26.13% hold leadership positions. While these numbers indicate progress compared to previous years, the industry still has work to do to close the gender gap.

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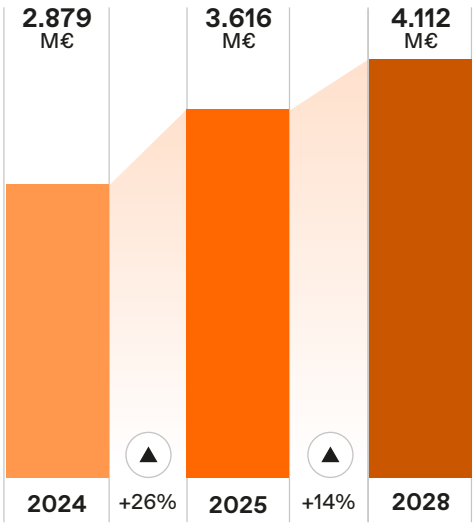
The hub ecosystem in Catalonia

160 tech hubs

active in 2024

Economic impact on the region

Tech hubs generated a value of €2.879M in 2024, averaging €18M per hub



Deep Tech takes center stage

70 % develop deep technologies

AI, blockchain, and robotics among the most developed technologies

Jobs created in 2024

6,191 new jobs

A total of 34,869 people are employed by tech hubs

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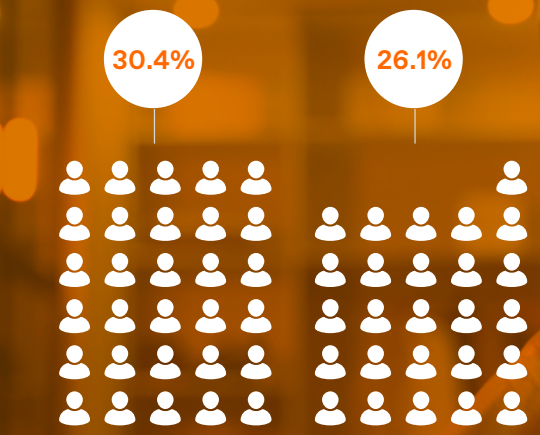
13 new hubs in Catalonia

22 M€ economic impact

263 new jobs

Female talent in tech hubs



[1] Above the European average (30.03%)
[2] Above the average in executive boards of Spanish ICT companies (25%)

Decision-makers & global players

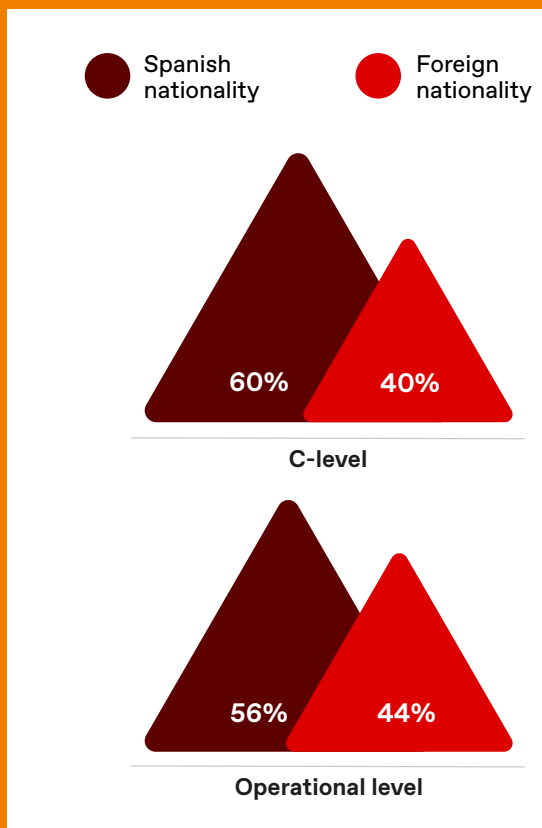
70% execute and impact decisions on their group's strategy

71% provide services beyond Europe

Top 10 ICT professions in tech hubs

- Software Engineer
- Consultant
- Cybersecurity Analyst
- SAP Professional
- Data Analyst
- Video Game Developer
- Business Analyst
- Data Scientist
- Data Engineer

Local talent: key at all levels



1.
Introduction and methodology

Introduction and methodology

Context

After **two editions of the *Tech Hubs Overview* report** – the first published in February 2023 and the second in February 2024 – this third edition continues to explore the ecosystem of tech hubs in Catalonia and the impact they generate. Likewise, it updates the most recent data and introduces new perspectives for analysis. As main new features, this report presents the highlights of 2024 and provides greater insight into the track record of hubs in Catalonia since they were set up, the key factors for their consolidation, and their growth prospects.

What challenges is the region facing to maintain sustainable growth? Are there significant differences in gender or nationality between the management and workforce layers of the hubs? What are the main environmental and social measures that are being implemented? What are the current trending technologies and where are they heading? These are some of the questions this new edition of the report seeks to answer.

This study confirms that tech hubs continue to be **drivers of growth and innovation, with a strong impact on the digital economy and unique potential to attract highly qualified talent.** However, in an increasingly competitive scenario, it is crucial to understand how changes in the global tech landscape can influence Catalonia's opportunities as a center for attracting investment and talent. Partnership between the public sector, companies and research centers is essential to promote a robust ecosystem, yet it is also necessary to analyze what the differentiating factors are and the areas where a more strategic approach is needed to maintain the region's leading position and international prestige as a preeminent destination for innovation and technology.

Study objectives

The main goals of this edition of *Tech Hubs Overview* are to:

1. Size and characterize the hubs in Catalonia, emphasizing the ecosystem they generate.
2. Unpack the evolution and growth of the hubs to date as well as expectations and sustainability in the short and medium term.
3. Learn and measure the impact, evolution, and added value of the hubs.
4. Investigate whether Catalonia is on the right track to be a leading territory for value-added tech hubs, addressing the challenges and opportunities they face in the coming years.

Scope of the report

Within the diversity of global technology service hubs established in Catalonia, this report focuses on the ones meeting the following conditions:

1. **Method of creation:** Set up by direct investment or acquisition of local companies by a foreign parent company or corporate group.
2. **Activity:** Involvement in the development of technology in any of the stages of the value chain except for marketing, thus excluding hubs exclusively engaged in sales.
3. **Scope:** A technology-focused department or team within a parent company with an international reach.
4. **Location:** The tech hub must be located in Catalonia.

This study analyzes the hubs in Catalonia set up by a foreign company or corporate group which develop technology to deliver services internationally, either for third parties or for the company itself. In terms of methodology, the report includes analysis of a substantial number of companies that meet these conditions, thus yielding significantly more accurate results than studies carried out by means of sampling techniques.

However, due to various reasons such as the lack of a public directory of hubs with these features and the vibrancy of the tech hub market, it may be that a small number of hubs meeting the above characteristics have been left out of the analysis. Hence just like its predecessors, this report should be viewed as a living document that will have to be updated on a regular basis to reflect as closely as possible the actual situation in the global tech hub market.

The study's universe is made up of 160 tech hubs belonging to foreign companies or corporate groups. It

should be noted that, as mentioned above, the universe of hubs is dynamic. For example, in this edition, 20 new hubs have been identified that had not been registered in previous editions: a total of 26 new hubs have been incorporated, while 6 have been excluded from the scope.

- Of the 26 hubs added, 13 were created in 2024, while the remaining ones were established in previous years.
- The exclusion of the 6 hubs is due to two main reasons: 2 hubs were wound up over the past year, while 4 were excluded after it was determined that they do not meet some of the defined criteria for being considered a hub within the framework of this report.

Thus, the initial ecosystem of 140 hubs is expanded with these new additions:

- Accenture
- Acuity Trading
- Adesso
- Adevinta (Schibsted)
- ADP (Automatic Data Processing, Inc.)
- Airbus GeoTech (geo-information and defence solutions, Airbus Intelligence site in Barcelona)
- AkzoNobel
- Alexion
- Alkimia Interactive
- Alliance Healthcare - Alcura
- Allianz Technology
- Alstom
- Amazon
- Arxada
- Asea Brown Boveri, S.A.
- AstraZeneca
- Avanade
- AXA Seguros
- B. Braun
- Bacardi
- Bandai Namco Mobile SL
- Bayer
- BESPOKE PIXELS LLC
- Bitpanda
- Bizerba Iberia España SAU
- Boehringer Ingelheim
- 2Boston Consulting Group (BCG)
- Bumble
- Bunge Iberica SA
- Centiro Solutions S.L.
- Checkout.com
- Checkpoint Systems
- CI Games
- Cien.ai
- Cimpress
- Cisco
- Cofidis España
- Contentsquare
- Coovally
- Danone
- DataXstream, L.L.C.
- Delfos Energy S.L.
- Deloitte
- Dolby
- Domo Chemicals
- Dynatrace
- Elring Klinger
- Enel
- Entravision
- Erni Consulting
- Essity
- Festo
- Flight Centre Travel Group
- FREENOW
- Fujitsu
- FunPlus
- GameHouse
- Gameloft
- Gartner
- Getronics
- GFT IT Consulting, S.L.U,
- Giesecke+Devrient
- HCL Technologies
- HP
- IAG
- IBM
- IFCO
- IGG
- Infor Software Iberia SAU
- Ingram Micro
- Intel i Barcelona Supercomputing Center
- IO Interactive
- IRP Systems Europe
- King
- KION Group
- KPMG Asesores SL
- Laboratorios HARTMANN
- Larian Studios Spain SL
- LGT Private Banking*
- Lufthansa
- ManoMano
- MediaMarkt (Media Markt Saturn TH Services Barcelona S.A.)
- MeetDeal
- Michael Page
- Microsoft
- MiR Robots (Teradyne Robotics)
- Mongo DB
- Monolithic Power Systems (MPS)
- Moodle
- N26
- Nestlé Barcelona IT Hub
- Netease
- Nimble Giant Entertainment
- Novartis
- NTT DATA
- Nutanix
- Ocado
- Omron Europe BV
- Oracle Health
- Oracle NetSuite
- Papernest
- Paradox Tinto SL
- PayFit
- PepsiCo
- Porsche Digital
- PromoFarma by DocMorris
- Revolut
- Ricoh
- RMIT Europe
- Roche Diabetes Care
- Rovio Barcelona S.L.U.
- Sage
- Salesforce
- Sandsoft Games
- Sanofi
- Santévet
- SAP

- Satellogic
- Schneider Electric
- 1Scopely
- SCRM Lidl International Hub
- SEAT CODE
- Shiji Information Technology Spain, S.A.
- Siemens Energy
- SITA
- Social Point
- Solium
- Sony AI
- SQLI Spain SL
- Stenn
- TDCX
- Tech Data (TD Synnex)
- Technica Electronics
- Technology Delivery Center (Zurich Group)
- Teladoc Health
- Telavox
- Thoughtworks
- Tilting Point Media, SL
- Tokio Marine HCC
- Towa Pharma International Holdings
- Trainline
- Tripledot Studios
- T-Systems
- Ubisoft Barcelona
- Unión Internacional de Telecomunicaciones (UIT/ITU)
- Universal Robots
- Unmanned Life
- Unnax*
- Veepee
- Veeva Systems
- Veriff
- Viaplay Group
- Volkswagen Group Services
- Vueling
- Wanhua Chemical Group Co.,LTD.
- Worldline
- Ypsomed Software S.L.
- Zeptolab
- ZF Services España
- Zoetis Manufacturing & Research Spain, SL

Research techniques

The study uses the quantitative and qualitative research techniques listed below:

1 Sending a survey with a predominance of closed-ended questions to enable uniform data analysis.

2 Conducting strategic interviews to 7 hubs. Below are the details of the people interviewed:
   - **AkzoNobel** – Sergio Olivas, Manufacturing Director EMEA for Liquid Coatings
   - **Allianz Technology** – Gerard Esparducer, Head of the Spain Hub at Allianz Technology
   - **IRP Systems Europe** – Fran Ribas, Strategic Marketing Director
   - **MediaMarkt (MediaMarkt Saturn TH Services Barcelona SA)** – Xavier Morejon, MediaMarkt Barcelona Tech Hub Director
   - **SEAT CODE** – Isaac Partal, CEO at SEAT CODE
   - **Towa Pharma International Holdings** – David Peix, CEO of Towa Pharma International
   - **Airbus Geo Tech –** Roser Roca, director of Airbus Geo Tech Hub

3 Sending **technical forms** to the companies interviewed with the aim of adding to the information provided and gathering quantitative data.

4 Analysis of **data sources** to compare and complete the information captured by the means cited in the previous points, such as company register databases and press releases.

This has yielded an **81% representativeness ratio**[1] of the hubs in the specified scope as a result of their participation in the various techniques used.

[1] The representativeness ratio is calculated by taking into account the 55% of hubs (88) which answered the survey in this edition or were interviewed, the 20% (32) that did not answer the survey in this edition but did in the previous one and where most of the information was available, and the 6% (9) that did not answer the survey in this edition but did in the first one. Data from the previous editions were used to calculate the quantitative data on the number of employees in these 41 hubs (32+9) and the current figure was estimated using the average year-on-year growth rate of the sector in each of them.

Methodology

One of the key sections of the report is the assessment of size and quantification of the impact of tech hubs in Catalonia. This information has been calculated from the analysis of two aspects: Firstly, **job creation**, and secondly, **economic impact**.

This study aims to cover the entire universe of tech hubs meeting the defined criteria. Since **very high participation amounting to 81%** was achieved, the remaining 19% has been calculated using the following steps:

1. **Segmentation of tech hubs** by economic sector with the aim of minimizing margins of error and leveraging the patterns detected.
2. **Calculation of the average number of employees** per economic sector (excluding outliers so as not to distort the results). This calculation has been carried out using the data obtained in the surveys, interviews, and forms sent.
3. Use of the above data to **estimate the current and future situation of hubs** that have not taken part in the study but are nevertheless part of the universe. Specifically, this has been calculated for each sector to then obtain the aggregate data.
4. **Sum of the estimated data (19%)** with the remaining 81%.

Based on the estimate of the number of employees, the **economic impact of the hubs** was estimated by means of OPEX and an additional expenditure margin. Specifically, the following procedure was used:

- Considering **salaries and wages as the main expense** representing **80% of the total cost**. An average salary of the 10 mid ICT profiles most in demand coming to €49,600 has been taken as the basis for the calculation[2].

  This amount has been calculated through information on labor market supply and demand obtained from various sources, including job portals such as Indeed and Monster, Buffer and Levels.fyi wage reports, surveys such as Ask A Manager Survey and Recruiter Salaries, and social media sites such as LinkedIn and Xing. The analyzed database includes information on more than 250 million profiles, 65 million job offers, 23 million wage records and over 7 million companies; to obtain the result, these sources have been filtered and limited to focus the analysis on the wages offered in Catalonia for the aforementioned profiles. The resulting figure has been increased by the company's social security contribution, taking into account the maximum and minimum contribution bases for 2024 and the contribution rate. Taking the average salary of €49,600, the rate of 29.9% (non-occupational illnesses and accidents, unemployment, FOGASA and vocational training) has been applied to the contribution base for this salary.
- An **additional 20%** has then been added to the result for **other general expenses** such as renting facilities, utilities, marketing, and suppliers.
- Including the margin. For hubs providing services to other units or subsidiaries of the parent company, a **margin of 3%** has been added; for hubs providing services to third parties, a **margin of 15%** has been added; and finally, for hubs doing both things, an average **margin of 9%** has been added.

The estimate of the **future economic impact** has been made in the same way, increasing the average wage by 1.2% per year in line with historical inflation in the Eurozone and Spain over the last 10 years.

[2] In the 2025 edition of the report, a change has been made in the calculation of average wages. While in the 2023-2024 editions the average salary of a senior software developer was used as the basis, this year the scope of the study has been extended to include a more diverse range of professional profiles within the IT sector to reflect the actual situation more accurately. Thus, the 10 high-demand profiles have been taken into account, such as data analyst, software engineer , consultant, and cybersecurity analyst with the aim of obtaining a more complete and representative view of current wage trends in the sector. In addition, the increase in employees in the hubs has been taken into account, which has led to a higher presence of mid positions in relation to senior ones with more years of experience and, therefore, higher salaries. This change allows us to better reflect the current situation and the evolution of talent in the tech hubs.

2.
Evolution of the hubs ecosystem in Catalonia

This section provides an evolutionary view from the advent of the first tech hubs in Catalonia to the present day. It identifies the years in which there has been significant growth, the most representative sectors and the key factors that continue to make Catalonia and Barcelona an attractive location. Finally, the report examines the cities competing to attract these tech hubs.

Evolution of the hubs ecosystem in Catalonia

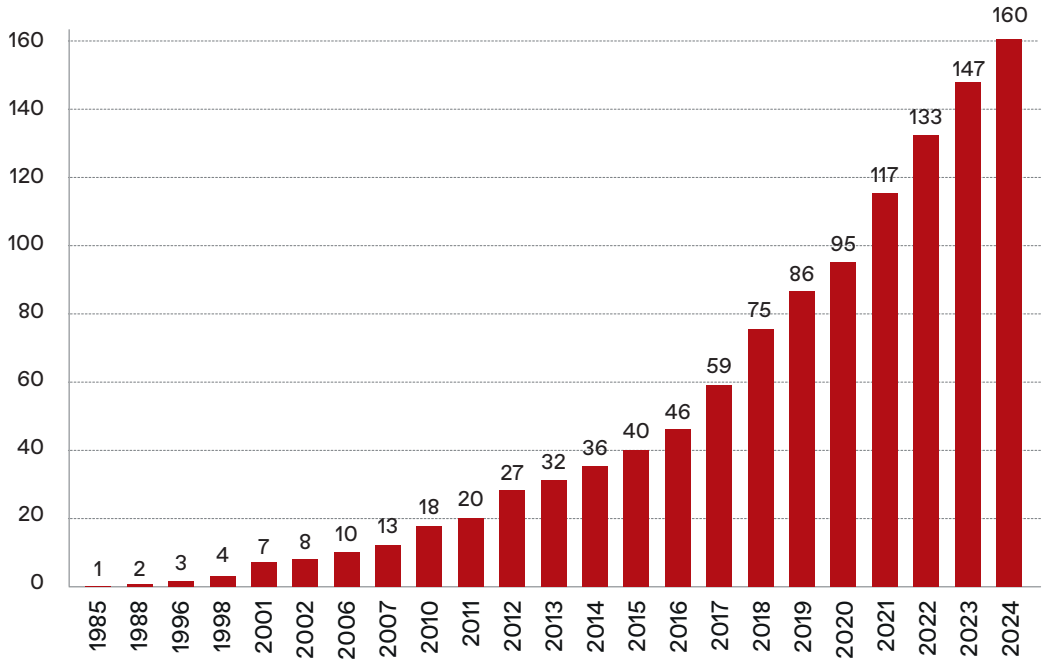
Number of tech hubs

The tech hubs ecosystem in Barcelona and Catalonia continues to grow at a constant rate: In 2024, 13 new ones were set up.

The number of hubs arriving in Catalonia has been increasing, with a stable trend of between 10 and 20 new ones each year. Almost 50% of hubs have been set up in the last six years, and 2021 stands out in particular as the year with the highest growth at a record 22 new hubs. In 2024, there are a total of 160 active tech hubs.

This evolution is evidence of the region's commitment to the future and digital transformation, also demonstrating Catalonia's attractiveness as an innovation, collaboration, and development hotspot.

Change in the number of tech hubs in Catalonia[3]



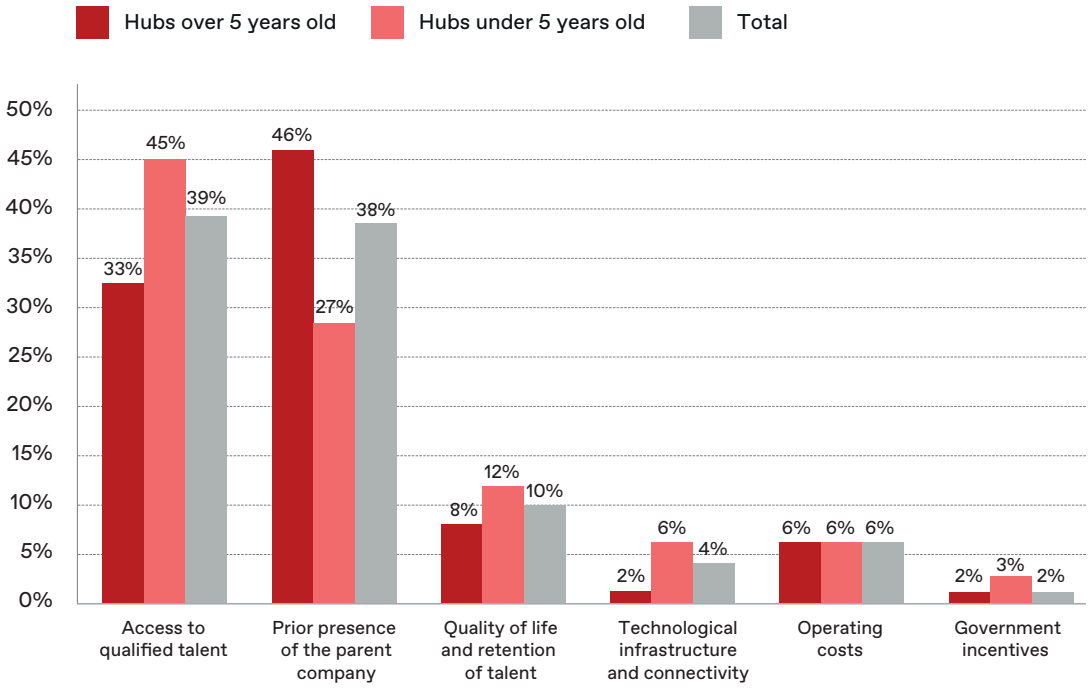
[3] The number of hubs in the years prior to 2024 may differ from the figure published in the previous edition of the Tech Hubs Overview report. This adjustment is due to the fact that new hubs have been identified that had not been registered in previous editions and have been added to the total population analyzed. In addition, six of the hubs included in previous editions have been excluded from the scope of the study or have been liquidated, as outlined in the previous methodology chapter.

Reasons to set up in Catalonia

Barcelona, innovation hotspot due to talent, business community, and quality of life.

Highly qualified talent is still the key factor in making the decision to set up shop in Catalonia (39%), followed by the previous presence of the parent company in the territory (38%) and quality of life (10%). At this point, it should be noted that the availability of talent has become more relevant in recent years as opposed to previous physical presence in the territory which has lost ground. Therefore, it can be said that Catalonia is perceived as a rich, diverse, and qualified ecosystem.

Initial reasons for locating hubs in Catalonia



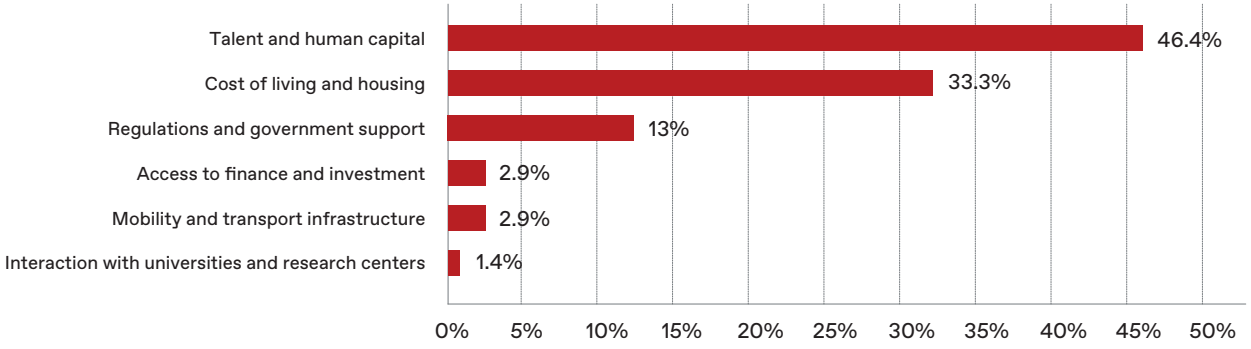
“The Ingram Micro hub in Barcelona has a key impact on the company’s global strategy by taking advantage of its strategic location, logistics infrastructure, and multicultural environment to attract highly qualified talent. Essential activities such as software engineering, data analysis and the development of technological platforms are performed in the hub. Barcelona also provides an environment that strengthens the company’s ability to respond flexibly to market needs and lead digital transformation in the sector.”

José Luis Sánchez
Director - Ingram Micro Spain

Talent, a driver of attraction and at the same time the main strategic challenge for the future of hubs in Catalonia.

Talent is a key factor that has turned Catalonia into a magnet for international hubs with its highly qualified professionals, renowned universities, and innovative ecosystem. However, according to the hubs surveyed, the future poses three major challenges in order to ensure constant and sustainable growth: Guaranteeing a supply of talent sufficient to meet demand and retain the best professionals against global competition (46%); addressing the cost of living and the price of housing (33%), and enhancing the support of the government and public administration (13%).

The future challenges to be addressed according to the hubs



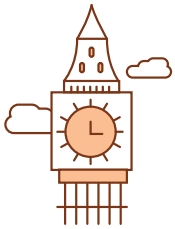
Competition among European cities to attract tech hubs

Madrid, Lisbon, and other major capitals in Central and Western Europe—such as London, Paris, Amsterdam, and Warsaw—are competing with Barcelona to attract technology hubs.

Notable differences emerge depending on the age of the hubs and the cities they considered before choosing Catalonia. Over the past five years, Paris and Berlin have gained prominence, while cities like London, Dublin, and Málaga have seen a decline in relevance. This shifting landscape is a key trend to watch in the coming years.

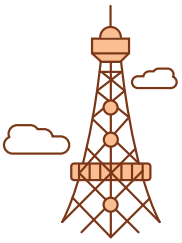
Cities competing with Barcelona-Catalonia

21%
Madrid

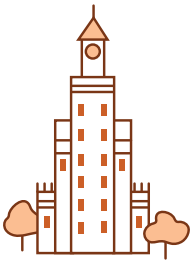


16%
London

16%
Lisbon

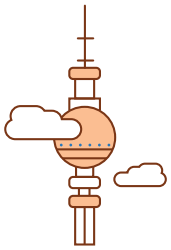


13%
Paris



12%
Warsaw

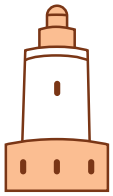
11%
Amsterdam



10%
Berlin

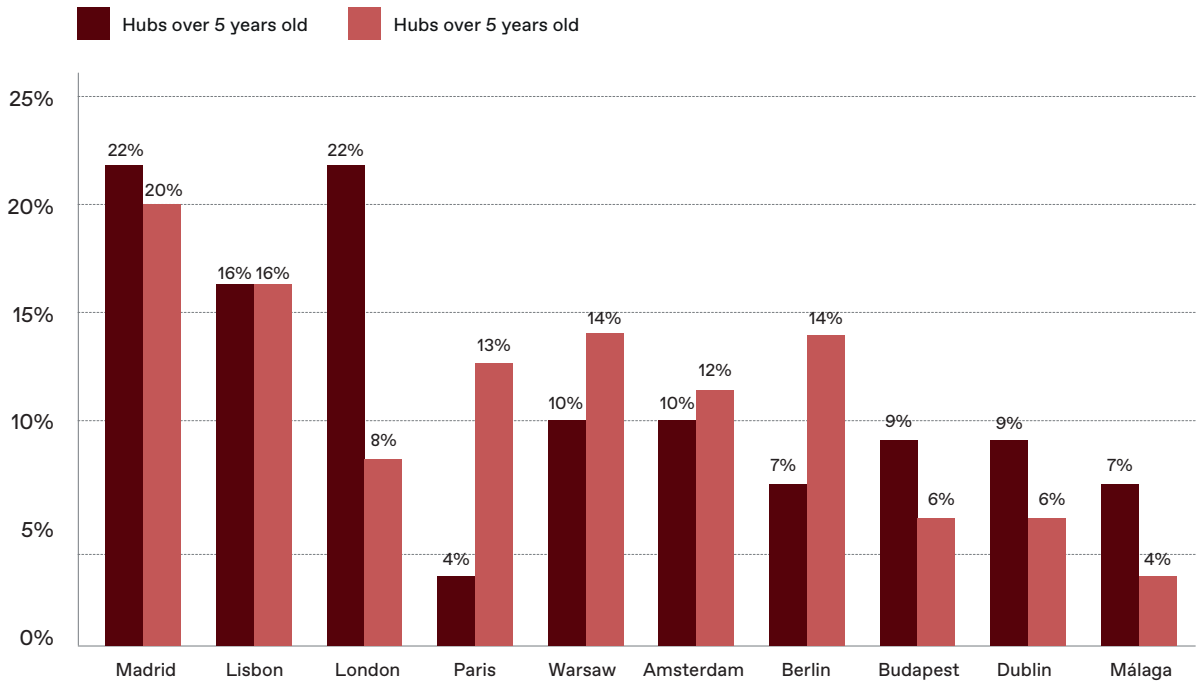
8%
Dublin

8%
Budapest



6%
Málaga

Cities considered by hubs before settling in Catalonia, based on their establishment year

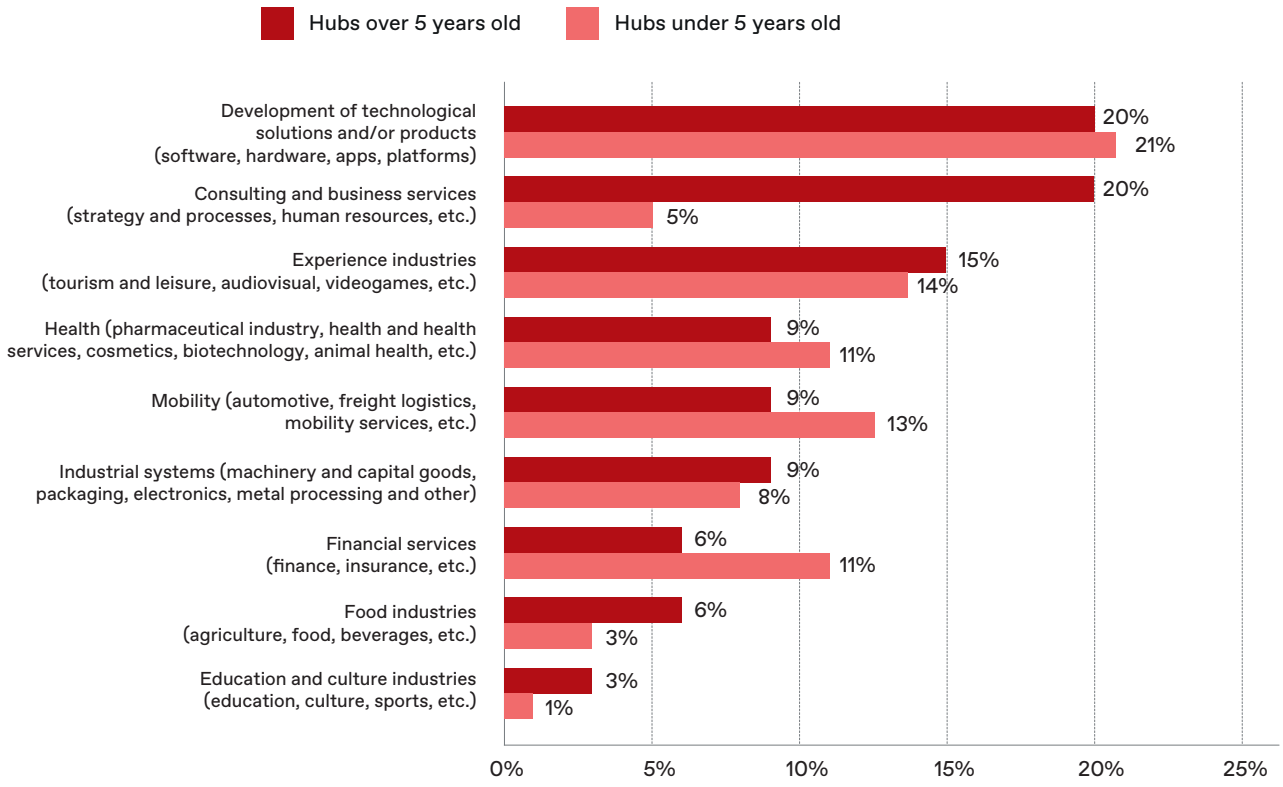


Evolution and trends in the sectors

In the last 5 years, the arrival of new hubs has been concentrated mainly in sectors developing technological (21%), health (11%), finance (11%), and mobility (13%) solutions.

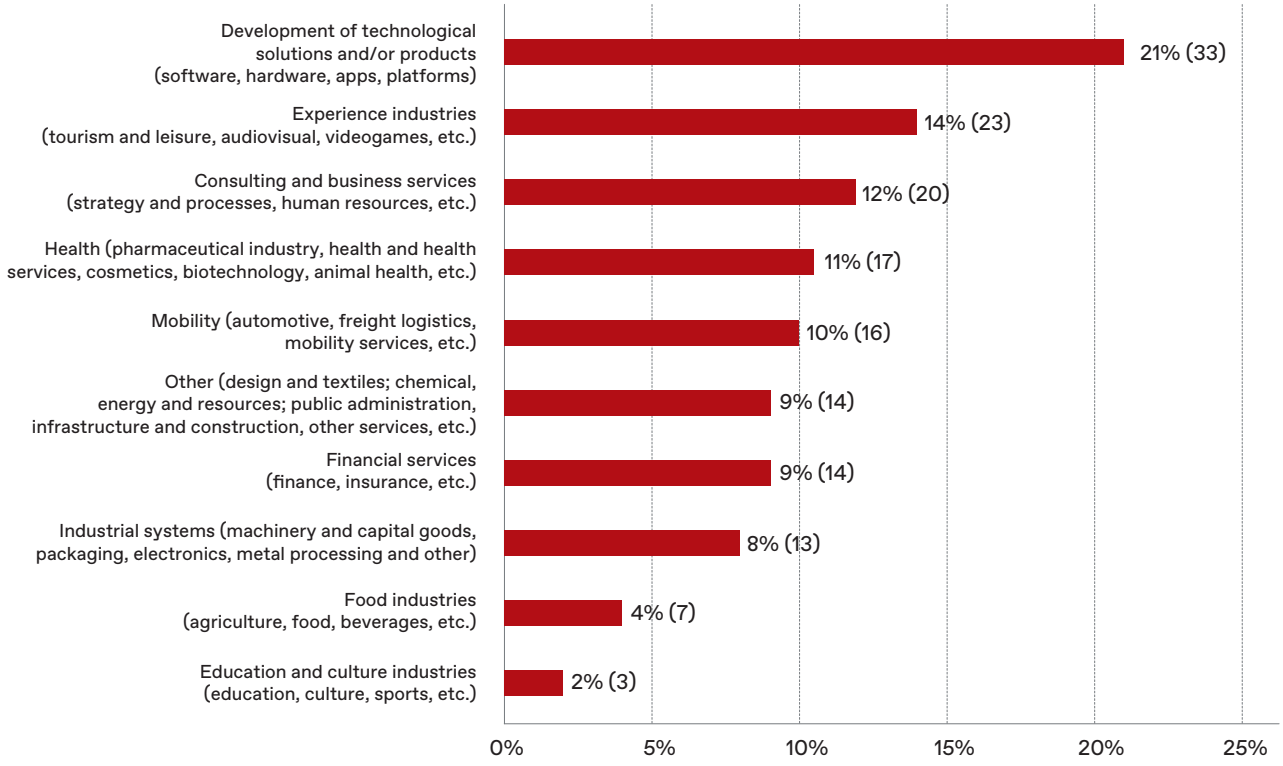
The arrival of hubs in the consultancy, business services, and food industry sectors has begun to slow down in the last 5 years. Likewise, the experience industries sector has also moderated its growth, albeit less markedly. However, in absolute terms, in 2024 the experience and consultancy and business services industries remained in second and third place for hubs located in Catalonia at 14% and 12%, respectively.

Distribution of hubs by sector[4]



[4] The sum of the percentages of each segment does not come to 100% because this chart does not include the "other" category.

Sectors of tech hubs in Catalonia



"Our hub attracts and trains digital talent, which makes Catalonia more competitive in the development of innovative, effective and inclusive digital solutions focused on enhancing the traveler's experience. We address revolutionizing the experience of travel, designing and creating solutions that transform and enrich the way people live their journeys."

Bea Domènech
COO – Lufthansa Group Digital Hangar BCN

3.
The impact of hubs on the territory

The economic impact of the ecosystem of tech hubs in Catalonia becomes evident through the changes they generate in the territory. This impact materializes mainly in two areas: On the one hand, the capacity of the hubs to generate employment and create job opportunities of high added value; and, on the other, their direct contribution to the economy, promoting wealth and economic development in the areas where they are implemented. This twofold factor turns tech hubs into key drivers for Catalonia's progress and innovation.

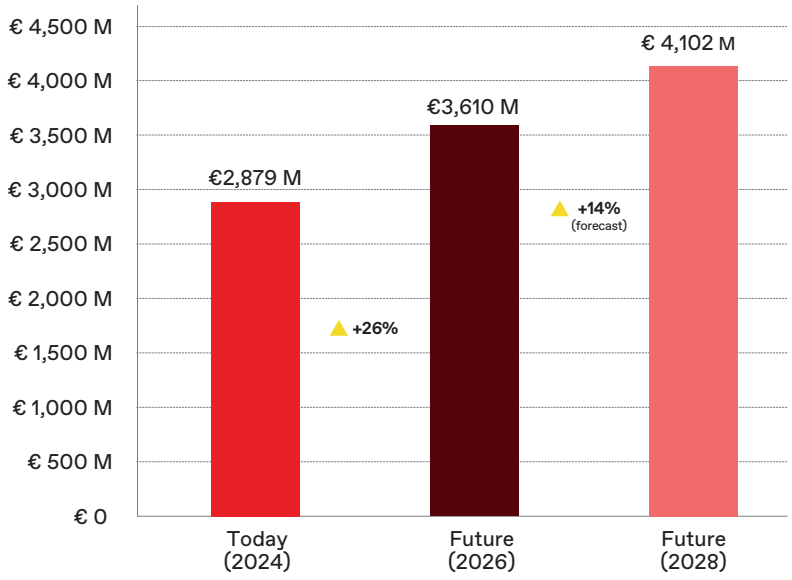
The impact of hubs on the territory

The impact and wealth generated by hubs

Tech hubs are firmly established as wealth generators with an economic value of €2,879 M in 2024, €18 M on average per hub.

The economic balance sheet confirms that tech hubs are a key player in the economic development of Catalonia. Projections suggest that they will post more than €3,600 million in 2026 and reach €4,000 million in 2028, an increase of 43% in just four years. This sustained growth adds to the ability to attract investment and talent, which cements the territory as a benchmark in technological innovation.

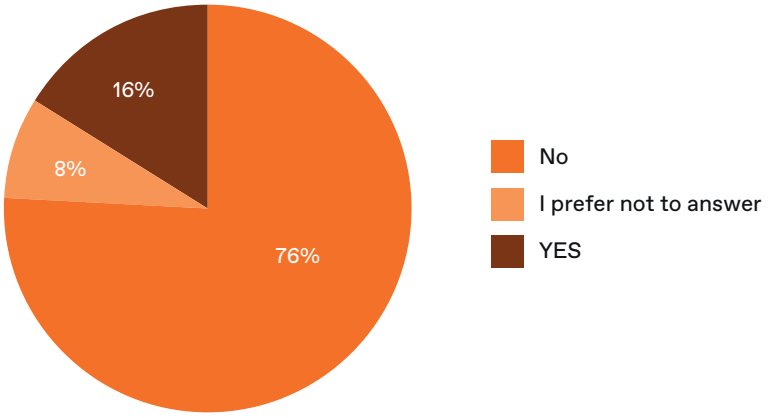
Economic impact of the hubs



Nearly 80% of the hubs established in the territory have maintained stability without any need for major divestment or restructuring since they were set up.

63% of the hubs that have carried out divestment have done so for internal reasons related to the reorientation of the company's strategic priorities, such as resource adjustment or focus redefinition, without these decisions being influenced by the specific performance of the hub or the conditions of the territory.

Have the hubs made divestments since they were set up?



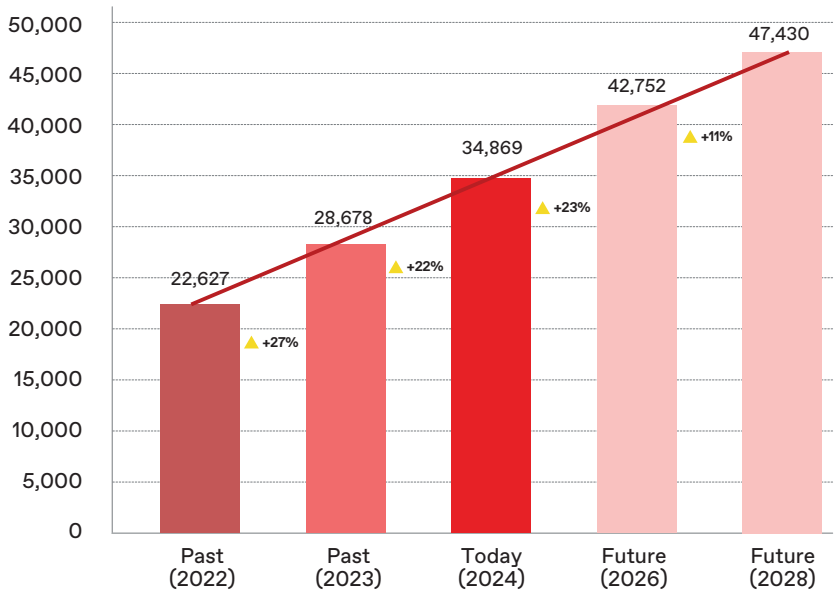
Jobs created and future expectations

Tech hubs in Catalonia continue to generate quality employment: In 2024 they have created 6,191 jobs, 16% more than in 2023; and in total, they employ 34,869 people.

By 2026, a significant 23% increase in jobs is expected, reaching a total of 42,752 positions. This represents an annual growth of approximately 10% in tech hub employment. This steady increase highlights the competitiveness and long-term sustainability of tech hubs in Catalonia.

Starting in 2028, gradual stabilization of the sector is expected with a forecast of 47,430 employees. This will mean an increase of 12,561 staff members compared to the current situation, an estimated growth of 36%.

Expected evolution of the number of employees in the hubs



“With more than 850 employees in a journey of just 8 years, Nestlé’s Global IT Hub in Barcelona has become the key part of the company’s digital transformation. This past year, through the democratization of artificial intelligence by innovative solutions such as NesGPT, we have optimized operational agility and responsiveness in all business areas. Acting as a driver of innovation, we enhance Nestlé’s competitive position in a constantly evolving digital ecosystem.”

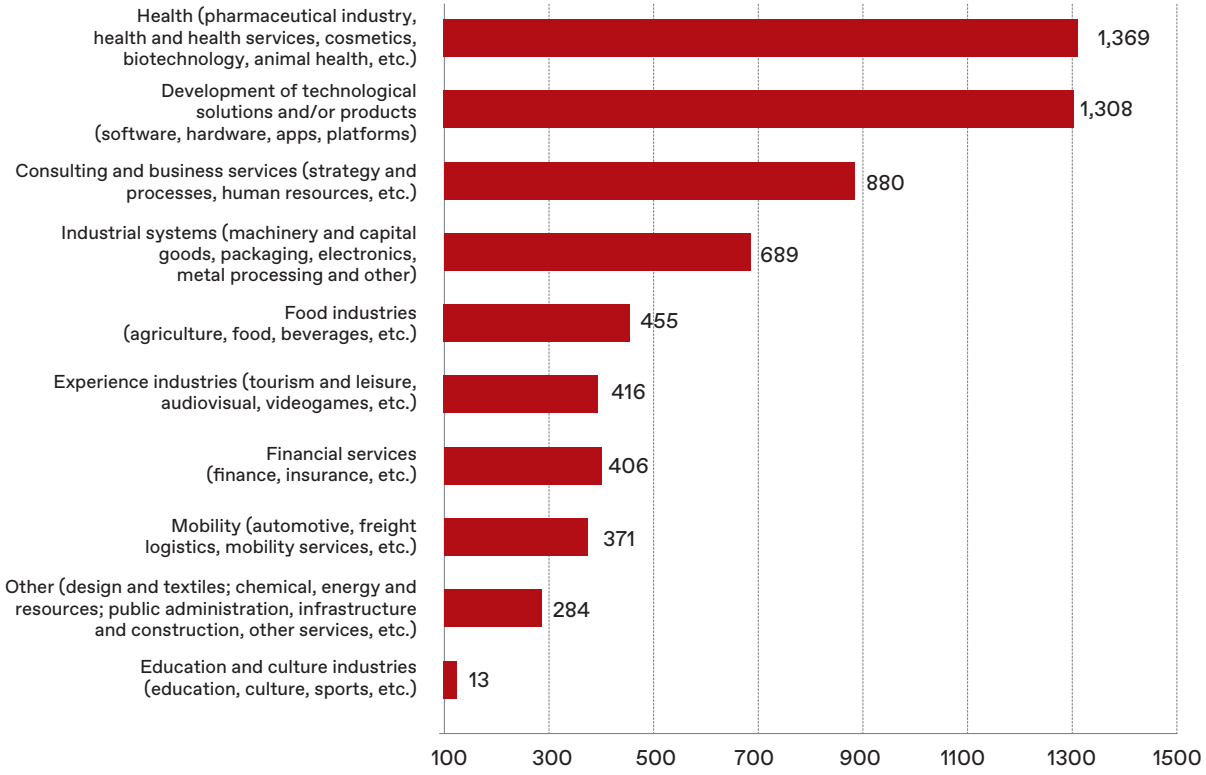
Susana Pastor
Global IT Barcelona Hub Manager Nestlé

The sectors contributing the most to employment in 2024

Job creation in Catalonia mainly comes from the health sector and technology product development.

The health and technology product development sectors have grown the most in 2024: The two sectors represent 43% of the jobs created in 2024, which is equivalent to almost 2,700 people.

Jobs created in 2024 by sector



4.
2024 analysis: Key figures of the new hubs

This section picks out the most significant changes observed in 2024 with special attention to newly created hubs.

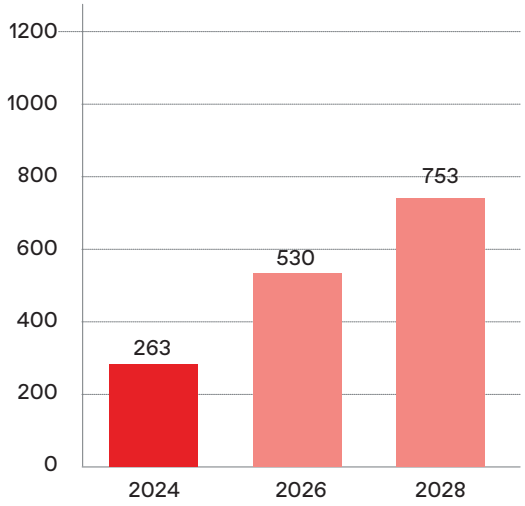
2024 analysis: Key figures of the new hubs

Arrival of new hubs in the territory

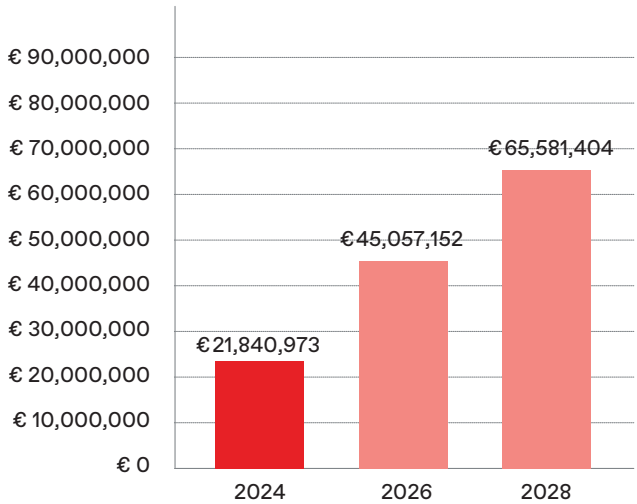
The 13 hubs set up in 2024 have generated 263 skilled jobs and an aggregate economic impact of almost €22 M.

The prospects for the future of the 13 hubs that have just been set up in Catalonia are promising: They expect significant growth in turnover from €21.8 million in 2024 to more than €45 million in 2026, and with the prospect of topping €65 million in 2028. These figures represent an increase of 106% for 2026 and 200% for 2028.

Jobs created in 2024 and forecasts of new hubs



Economic impact in 2024 and forecasts of new hubs



Characterization of the hubs

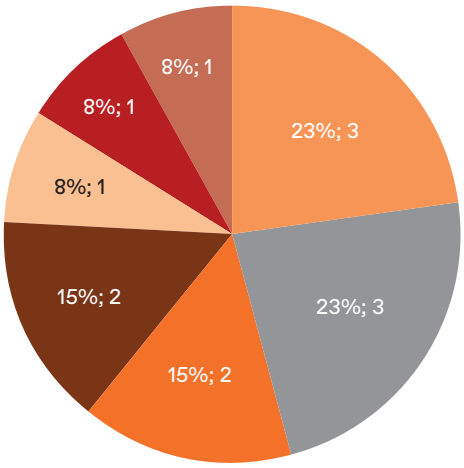
The country of origin and the sectors of the 13 companies that have invested in hubs in Catalonia in 2024:

Name of the hub	Country of origin	Sector
B. Braun	Germany	Health (pharmaceutical industry, health and healthcare services, cosmetics, biotech, animal health, etc.)
Bespoke Pixel	United States	Experience industries (tourism and leisure, audiovisual, videogames, etc.)
Coovally	China	Development of technological solutions and/or products (software, hardware, applications, platforms)
DataXStream	United States	Development of technological solutions and/or products (software, hardware, applications, platforms)
Delfos Energy	Brazil	Other (production, distribution and marketing of renewable energy as well as sustainable energy solutions)
IAG	United Kingdom	Mobility (automotive, freight logistics, mobility services, etc.)
IFCO	Netherlands	Industrial systems (machinery and capital goods, packaging, electronics, metal processing and other)
KION Group	Germany	Mobility (automotive, freight logistics, mobility services, etc.)
Revolut	United Kingdom	Financial services (finance, insurance)
Sony AI	Japan	Development of technological solutions and/or products (software, hardware, applications, platforms)
Stenn	United Kingdom	Financial services (finance, insurance)
Wanhua Chemical Group	China	Other (manufacture and marketing of specialized chemicals)
Elring Klinger	Germany	Mobility (automotive, freight logistics, mobility services, etc.)

Sectors

The leading sectors for the new hubs established in Catalonia in 2024 are technology solutions development and mobility, each with 3 new hubs. Companies operating in financial services, mobility, health, and industrial systems are also increasing.

The sectors of companies that have invested in hubs in Catalonia in 2024[5]

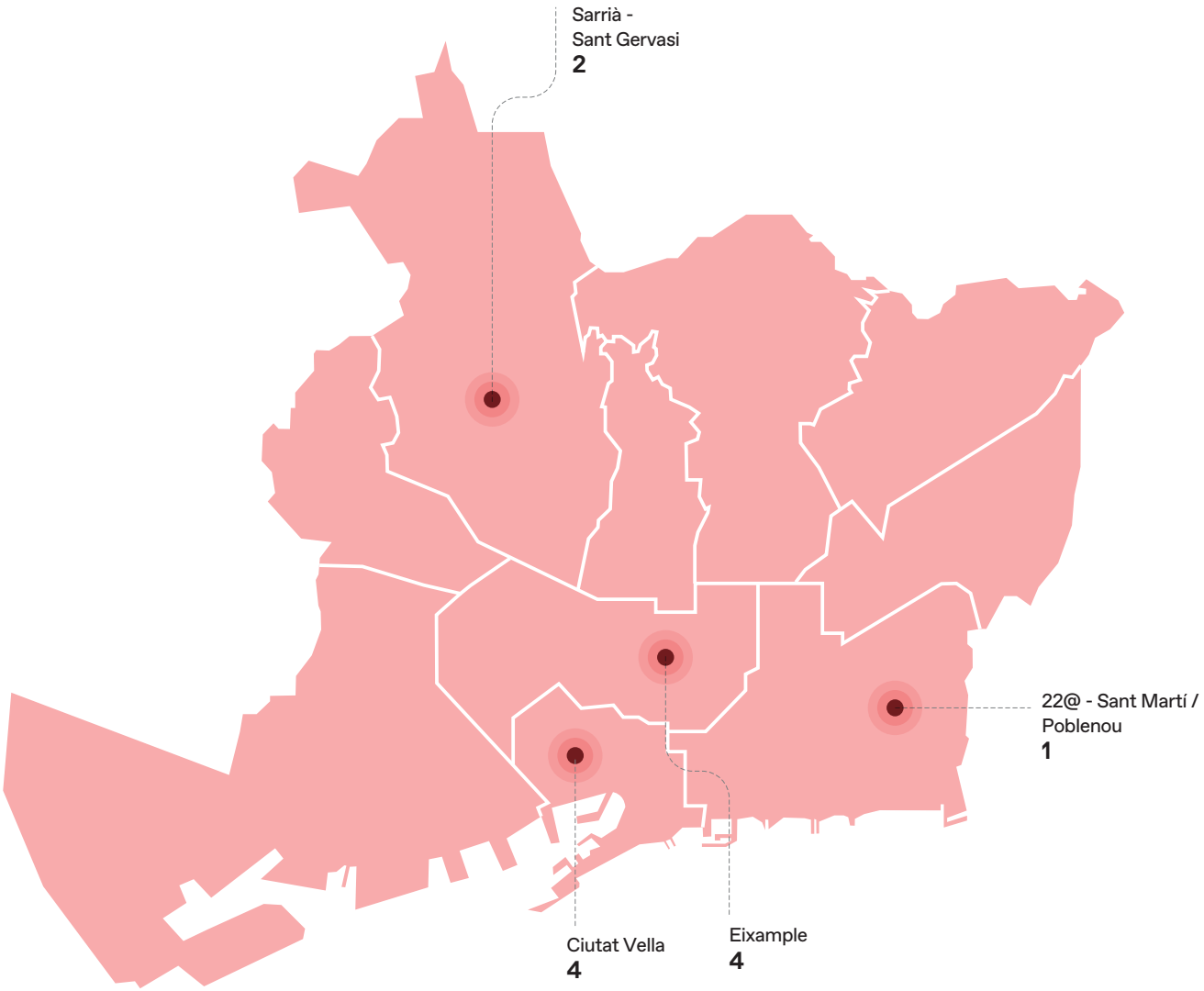


- Development of technological solutions and/or products (software, hardware, apps, platforms)
- Development of technological solutions and/or products (software, hardware, apps, platforms)
- Financial services (finance, insurance, etc.)
- Other (design and textiles; chemical, energy and resources; public administration, infrastructure and construction, other services, etc.)
- Health (pharmaceutical industry, health and health services, cosmetics, biotechnology, animal health, etc.)
- Industrial systems (machinery and capital goods, packaging, electronics, metal processing and other)
- Experience industries (tourism and leisure, audiovisual, videogames, etc.)

[5] Of the two hubs classified as "other", one is in the energy and resource sector, and the other in chemicals production and marketing.

Location

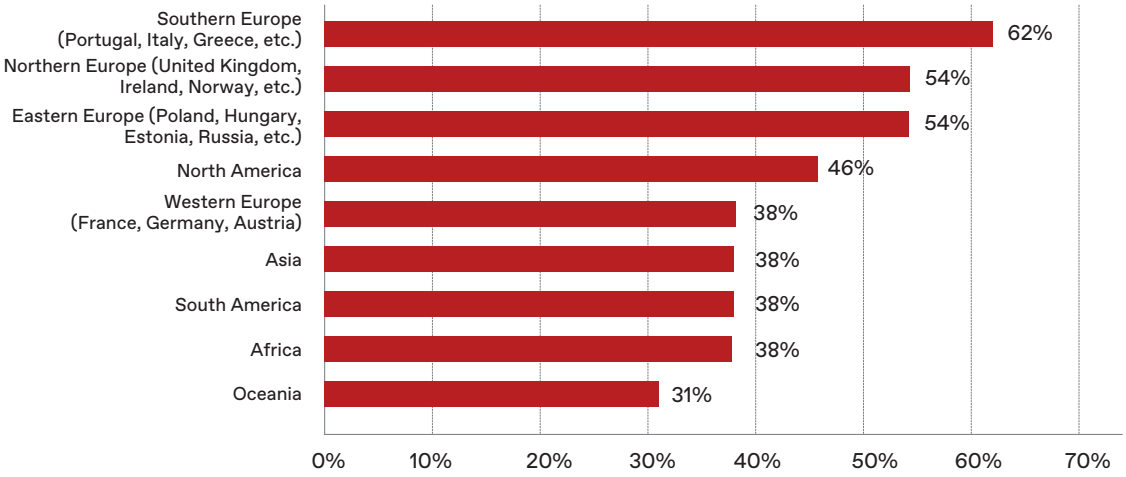
Of the 13 new hubs, 11 have been set up in Barcelona while 2 have been sited in the Barcelona Metropolitan Area. The most outstanding neighborhoods of Barcelona are Ciutat Vella and l'Eixample, with 4 hubs each, followed by Sarrià-Sant Gervasi with 2 and finally 22@ with 1 new hub.



Geographical scope

The new hubs in 2024 deliver services to an average of 7 geographical areas per hub with a prominent presence in Southern Europe (62%), followed by North America (54%) and Eastern Europe (54%).

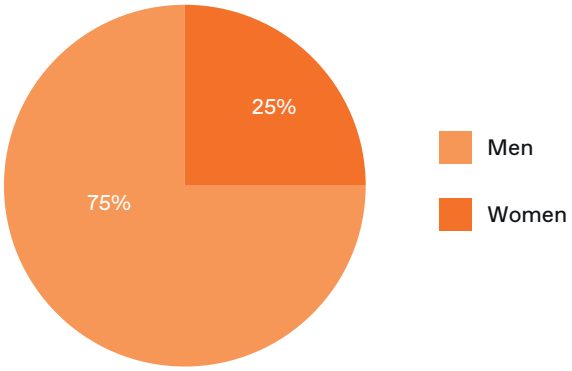
Geographical scope of services provided by hubs in 2024



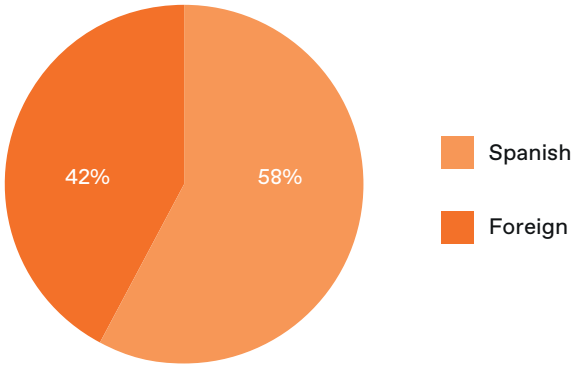
Gender parity and nationalities

The workforce in the hubs set up in 2024 is split between 75% men and 25% women. In terms of nationality, a balanced distribution between Spanish (58%) and foreign (42%) employees is maintained.

Gender distribution of the new hubs' workforces



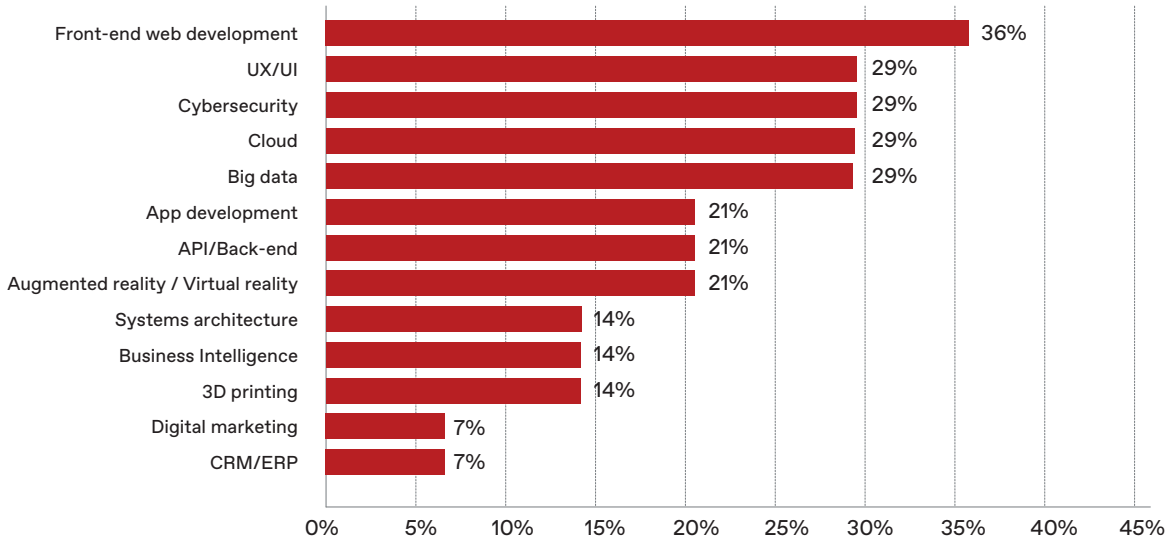
Distribution by nationality of the new hubs' workforces



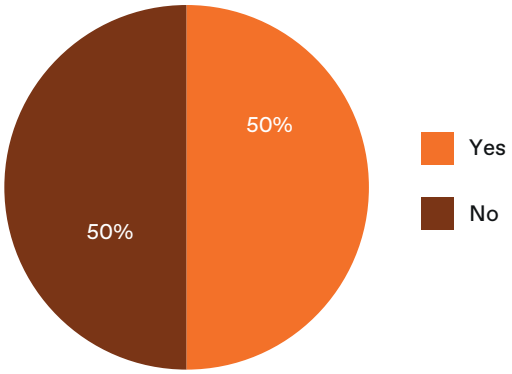
Technologies

Among the new hubs of 2024, the development of technologies such as front-end web development, UX/UI, cybersecurity, cloud, and big data predominates. 50% of new hubs say they develop deep tech technologies, and of these all focus on artificial intelligence.

Technologies adopted by the new hubs of 2024



Do new hubs develop deep tech technology?



“The B. Braun IT hub in Barcelona is crucial in the digital transformation of the hospital sector: It develops solutions based on cloud technologies that streamline the management of medical devices and hospital procedures. In a second stage, this hub is to take on personnel from all IT areas to deliver comprehensive support to B. Braun.”

Albert Almajano / Ernest Buil
CIO Iberia / IT Manager and head of the Hub - B. Braun

5. Profile of tech hubs

This section unpacks the key factors defining hubs in Catalonia: Territorial distribution, origin, evolution in scope and the markets they serve, as well as their growth within corporate groups. We will analyze how these hubs are not only consolidated as economic nodes but also how they globally influence strategic decisions and the expansion of companies.

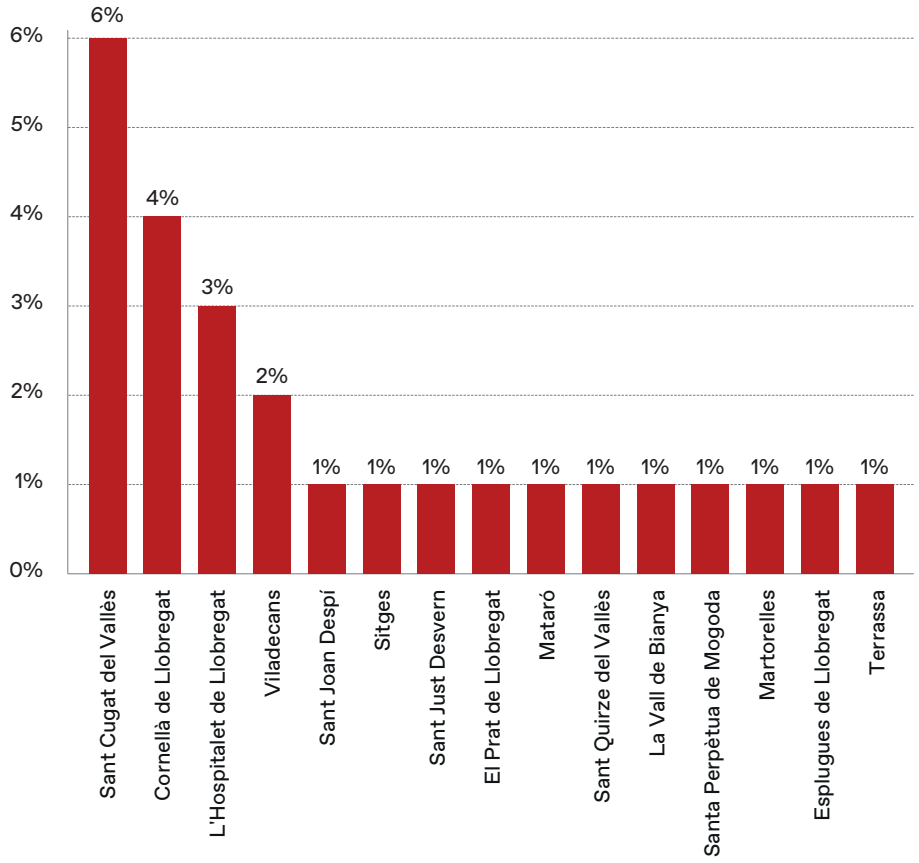
Profile of tech hubs

Territorial distribution of hubs in Catalonia

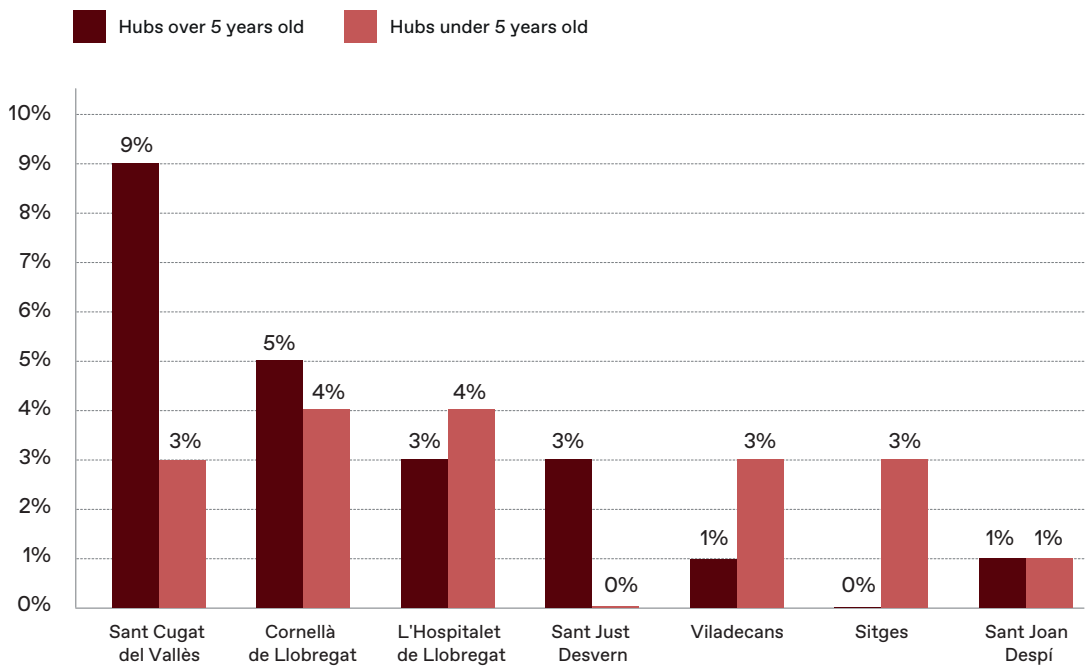
Barcelona remains the predominant location: 76% of the technological hubs are located in the city. The remaining 24% are spread across other locations in the region, with Sant Cugat del Vallès, Cornellà de Llobregat, and L'Hospitalet de Llobregat standing out as key sites.

The preference to set up in Barcelona has become more marked in the last 5 years and up to 80% of the new hubs have been established in the Catalan capital. The rest **of the Barcelona Metropolitan Area (AMB)** is the second location chosen by the hubs with a representation of 19%. Preferences are led by towns such as Sant Cugat (6%), Cornellà de Llobregat (4%), L'Hospitalet de Llobregat (3%) and Viladecans (2%). In general terms, the trend has remained stable over the years, although Sant Cugat and Sant Just Desvern have experienced a decrease among the most recently created hubs, from 9% to 3% and from 3% to 0%, respectively.

Location of hubs by municipalities outside Barcelona

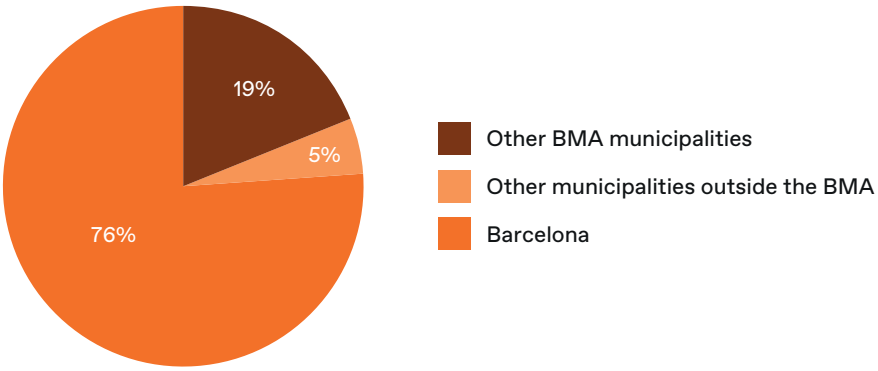


Location of hubs by municipalities outside Barcelona by age



5% of hubs located outside the AMB are also concentrated mainly in the province of Barcelona, with seven prominent locations: Sitges (2 hubs), Sant Quirze del Vallès (1 hub), Martorelles (1 hub), Terrassa (1 hub), Santa Perpètua de Mogoda (1 hub) and Mataró (1 hub). Finally, 1 hub is in the province of Girona, specifically in the municipality of la Vall de Bianya.

Location of hubs in Catalonia

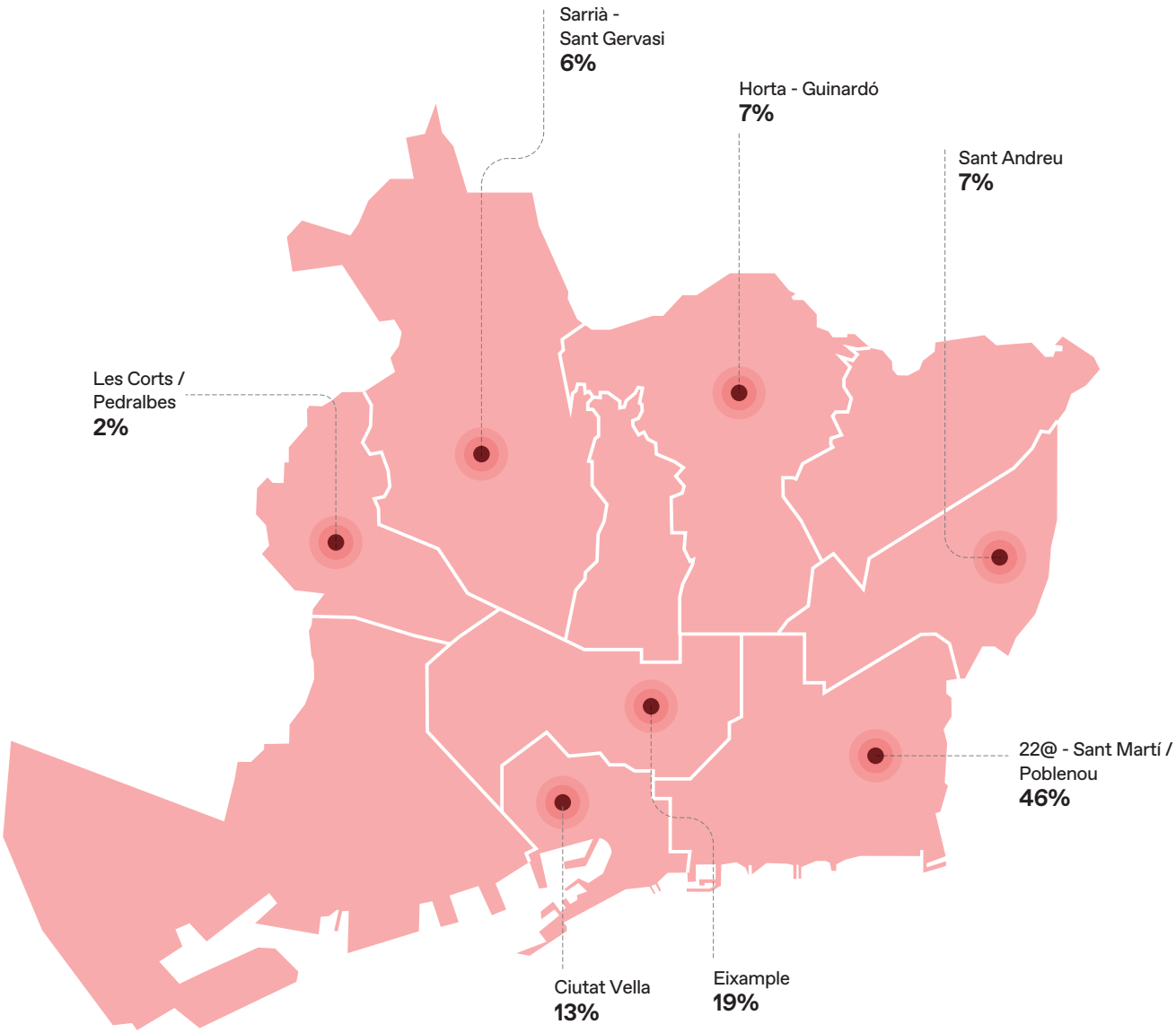


Although the city of Barcelona continues to dominate the ecosystem of tech hubs in Catalonia, based on **territorial distribution by activity**, the health sector is less centralized with 25% of hubs in the municipalities of Sant Cugat and Sant Joan Despí. With regard to the mobility sector, Viladecans has a significant share at 12% of hubs engaged in this activity. Finally, within the financial services sector, Cornellà de Llobregat accounts for14% of the hubs.

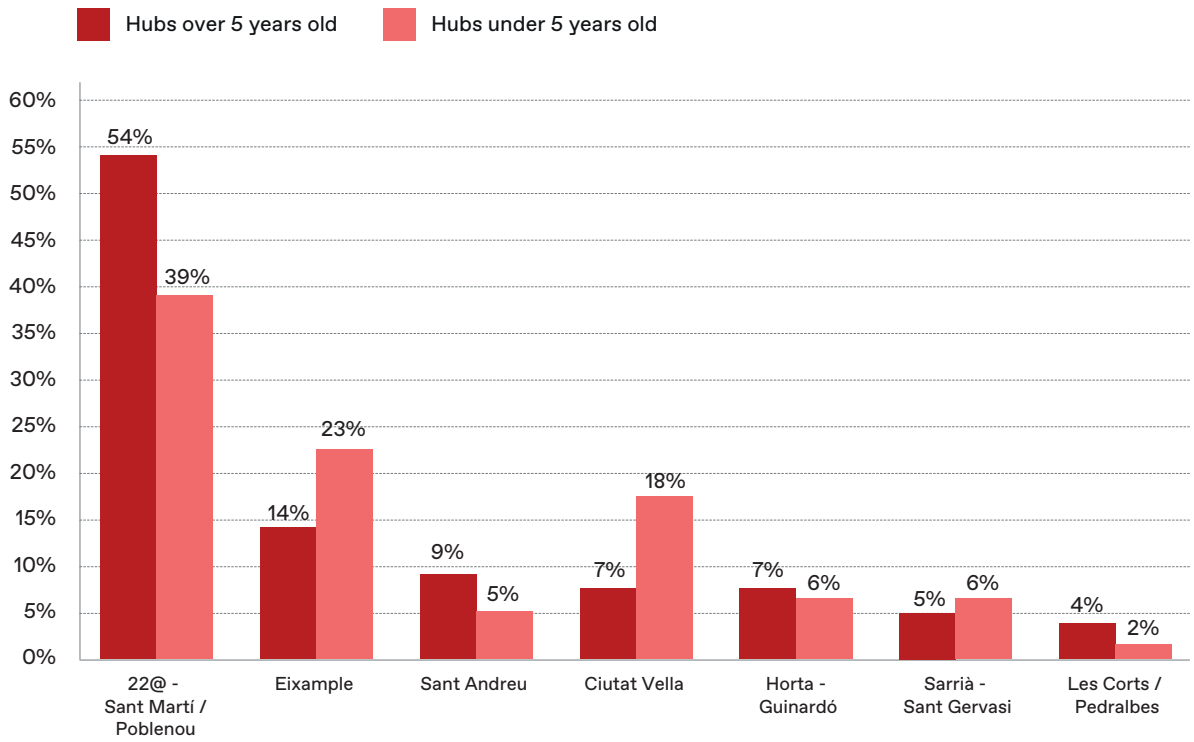
Within Barcelona, the 22@ district maintains its leadership and hosts almost half of the hubs in the city, followed by l'Eixample (19%) and Ciutat Vella (12%).

Although the predominance of 22@ (district of San Martí) is maintained, in recent years l'Eixample and Ciutat Vella have gained importance. The percentage of hubs set up in 22@ in the last 5 years has fallen from 54% to 39%, while in contrast the hubs installed in l'Eixample are up from 14% to 23%, and in Ciutat Vella from 7% to 18%.

Distribution of hubs in Barcelona by neighborhood



Distribution of hubs in Barcelona by neighborhood and years of operation

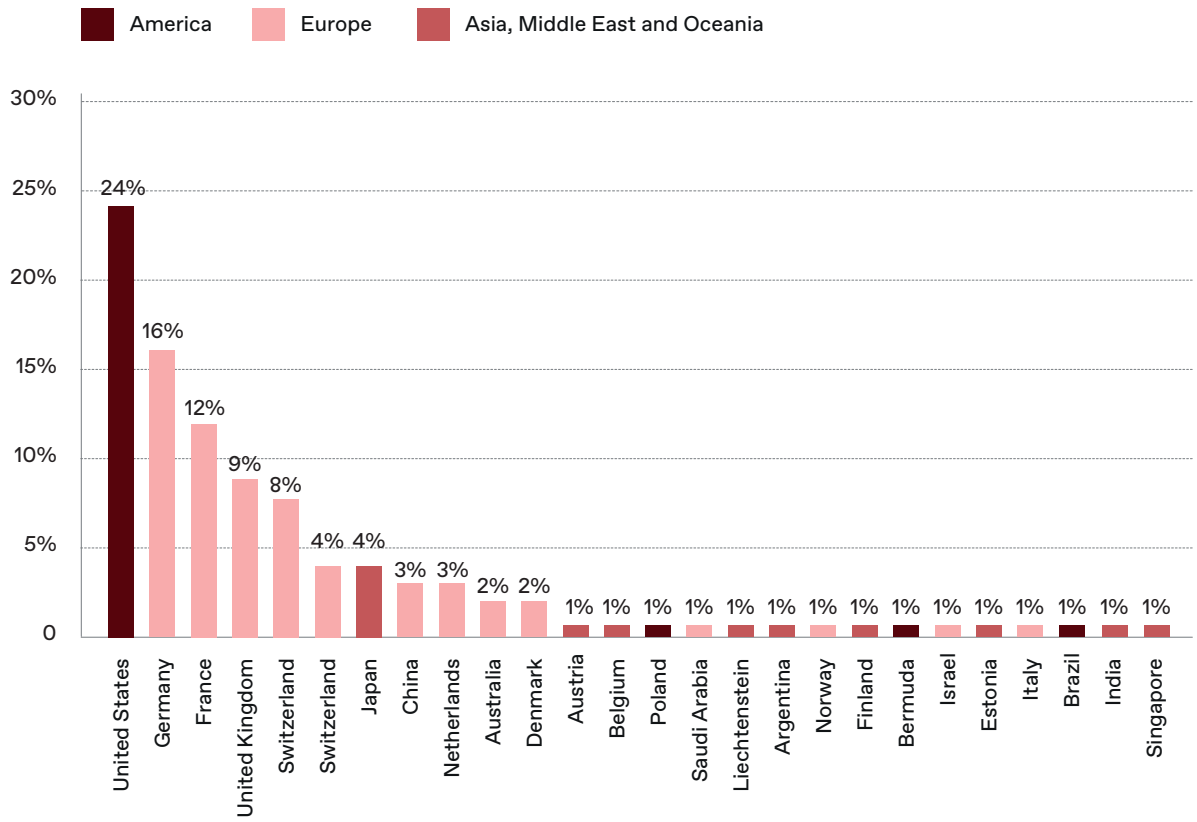


Country of origin of hubs

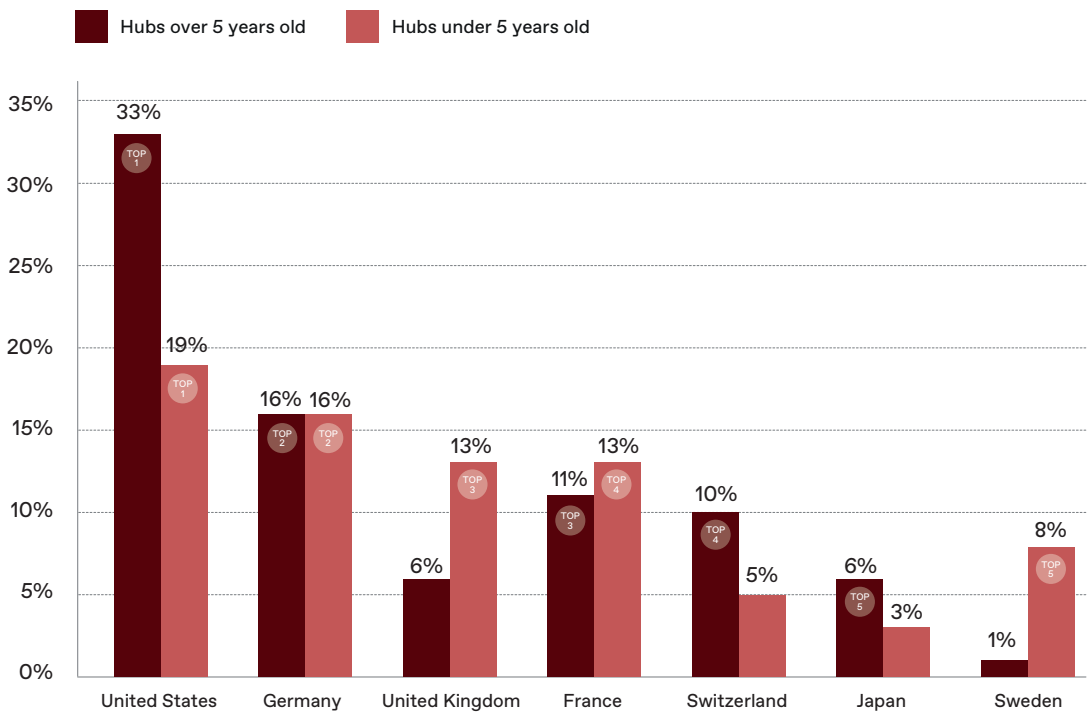
The United States leads the establishment of tech hubs in Catalonia at 24%, although in the last 5 years Sweden, the United Kingdom, and France have gained ground.

Europe gains in share and in 2024 **62% of the hubs in Catalonia come from a European country.** There has been a change in trend over the last 5 years: Although it continues to be the main country of origin, the United States has gone from accounting for 30% of hubs set up more than 5 years ago to 19% of the newest ones. In parallel, Germany and France have maintained a steady share with 16% and 11%, respectively, and the importance of countries such as the United Kingdom (from 6% to 13%) and Sweden (from 1% to 8%) has grown significantly.

Countries of origin of hubs



Top 7 countries of origin of hubs by age



As for the relationship of the countries of origin of the hubs and the sectors in which they operate, over the last 5 years, the United States has gone from having a multisector specialization with a significant presence in technology product development, business consultancy and services, and the experience industry to focus mainly on the technology solutions development sector. In Europe, there are a number of trends, especially the UK's preference for financial services and France's for the technology product development and financial services sector; on the other hand, there is Germany, firmly committed to the health, mobility, and industrial services sector, and Sweden, specialized in the experience industry.

“The RMIT hub in Barcelona offers a unique combination of Australian innovation and European experience. We are entrepreneurs and collaborate with industry in both local and global challenges following regenerative principles to promote a business impact that is positive for nature and for people. In Barcelona we work with the city and our partners to promote innovation in digital transformation and urban regeneration.”

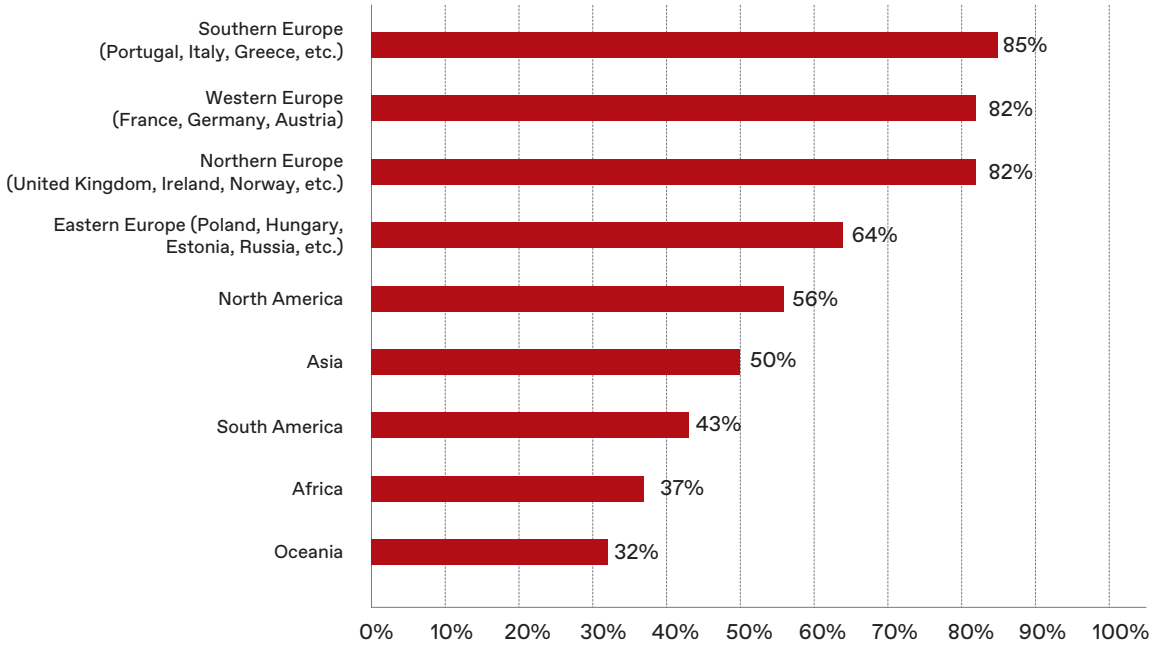
Marta Fernández
Executive Director - RMIT Europe

The territorial scope of the services provided by the hubs

71% of the hubs located in Catalonia provide services beyond Europe and are key facilities for the corporate group to which they belong.

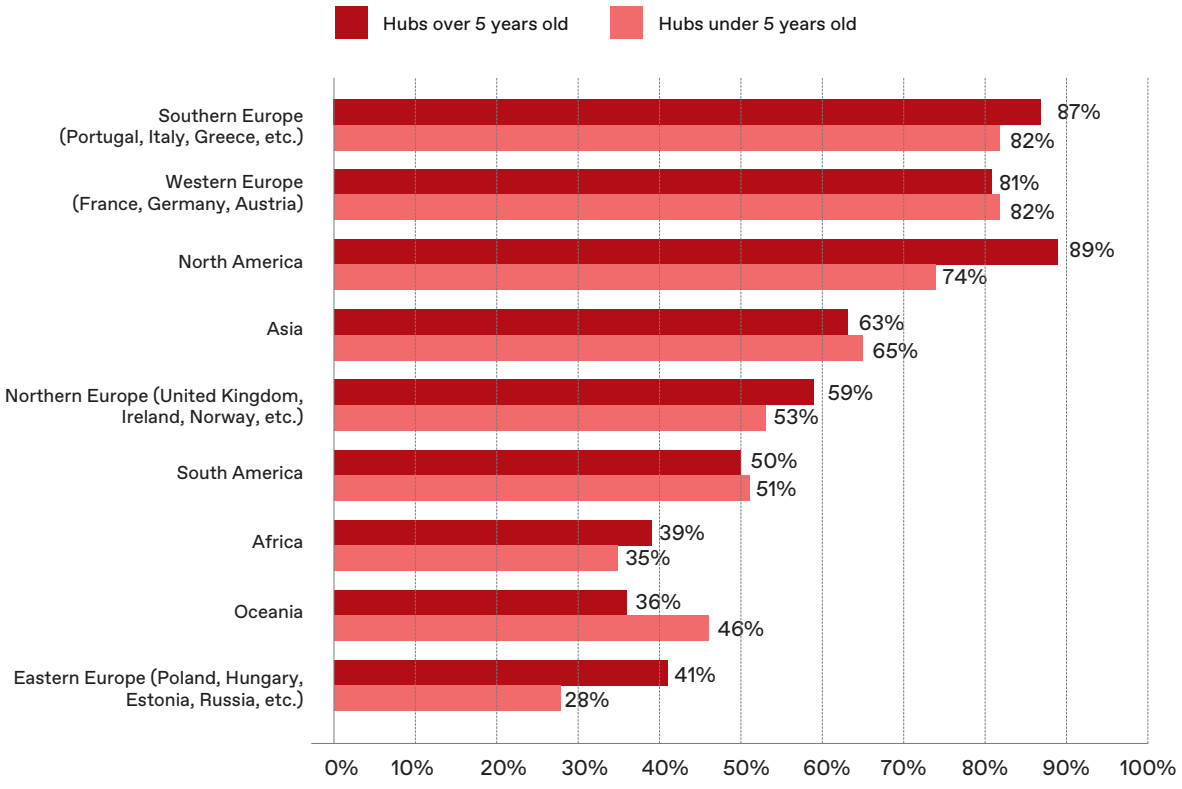
With regard to geographical scope, hub relations are largely in Europe, mainly in the south (85% of hubs deliver services there) followed by Western Europe (82%) and Northern Europe (82%).

Geographical scope of services provided by the hubs



Over time, the most recently created hubs show a decline in service concentration in North America, from 89% to 74%, and also in Eastern Europe, where it falls from 41% to 28%. Asia and Oceania, on the other hand, are gaining in importance: Asia is slightly up from 63% to 65% while Oceania increases from 36% to 46%.

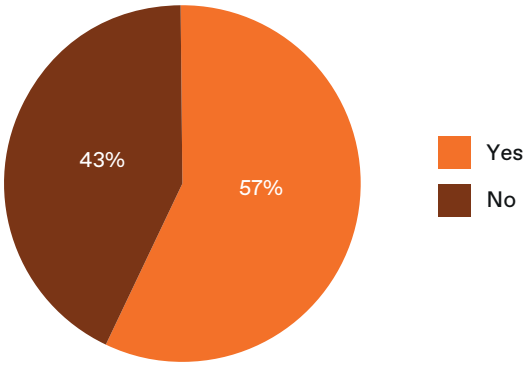
Geographical scope of services provided by hubs by age



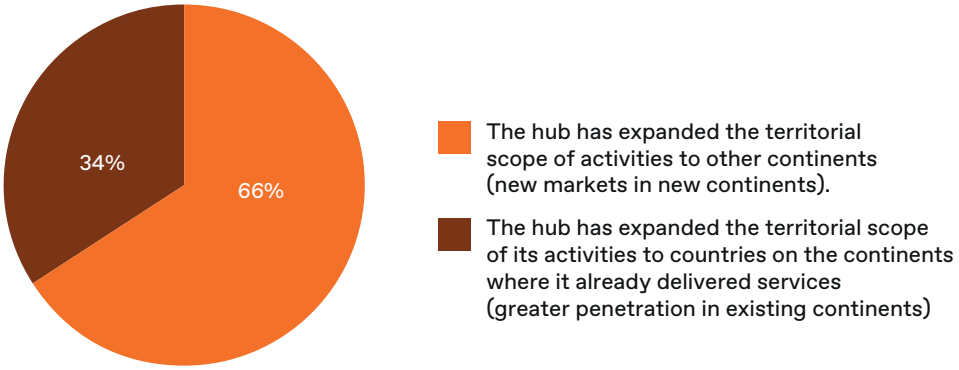
57% of tech hubs have expanded their activity and increased their territorial scope since they were set up.

In particular, 66% of the hubs that have expanded their territorial scope have reached new continents where they had no presence at first, while 34% have increased their penetration in existing markets. These figures show that Catalonia is a key location able to meet the hubs' growth needs.

"Has the territorial scope of the hub's activity changed since it was set up?"



"Where has this change evolved to?"

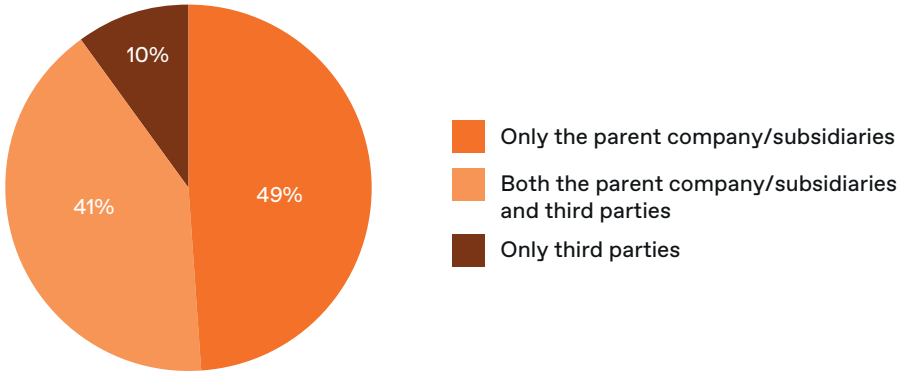


Type of customers and penetration of the hubs

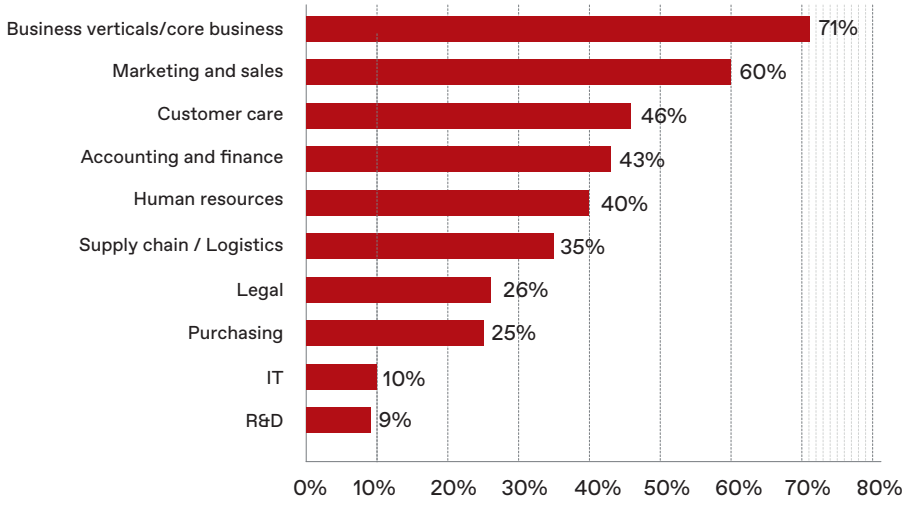
90% of tech hubs serve at least companies and departments within the corporate group to which they belong, reflecting a high degree of integration with the organization.

The hubs mainly cater to high value-added units and departments, including business verticals (71%), followed by sales and marketing (60%), customer service (46%) and finance (43%).

Hub's main customer

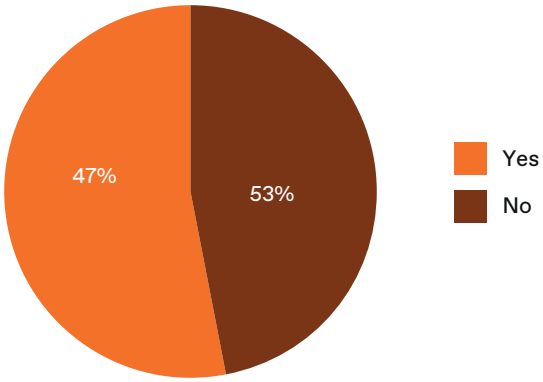


Areas of the parent company served by hubs

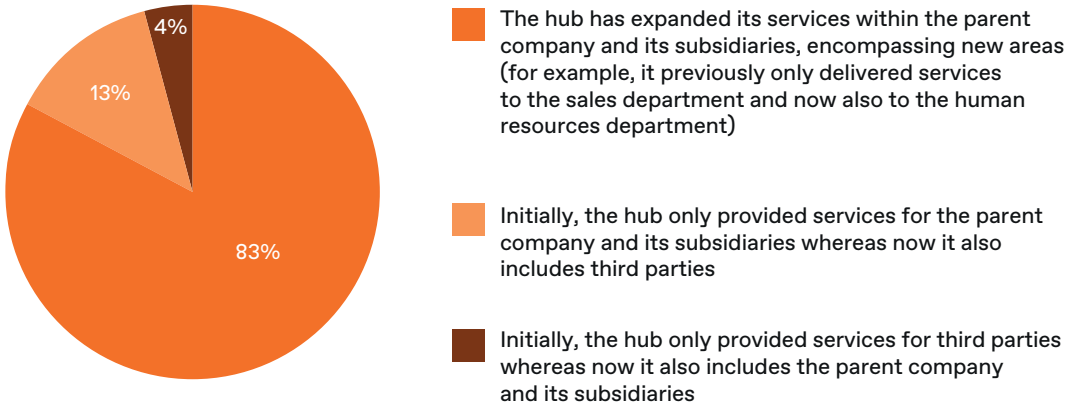


Almost 50% of the hubs have expanded their client portfolio over the years, especially the ones that have stepped up their presence in new areas and departments of the corporate group to which they belong (83%).

“Has the profile or type of customer targeted by the services changed since the hub was set up?”



“Where has this change evolved to?”

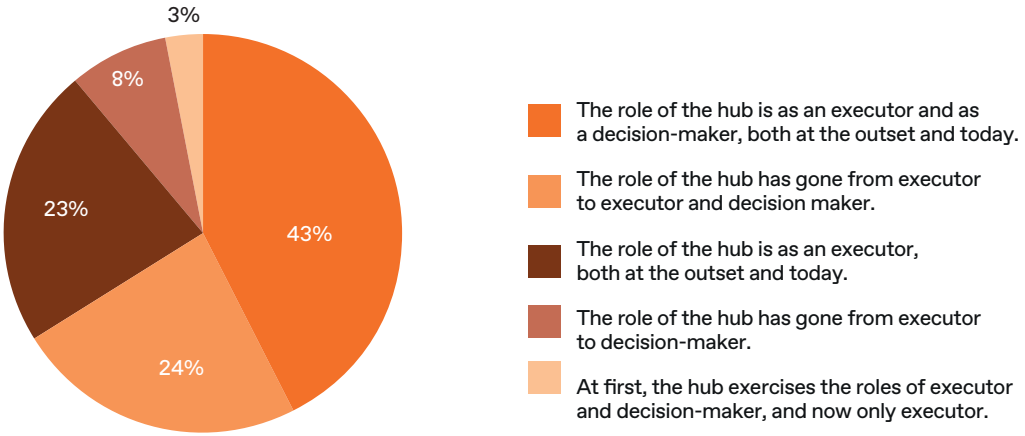


The role of hubs in decision-making within the corporate group

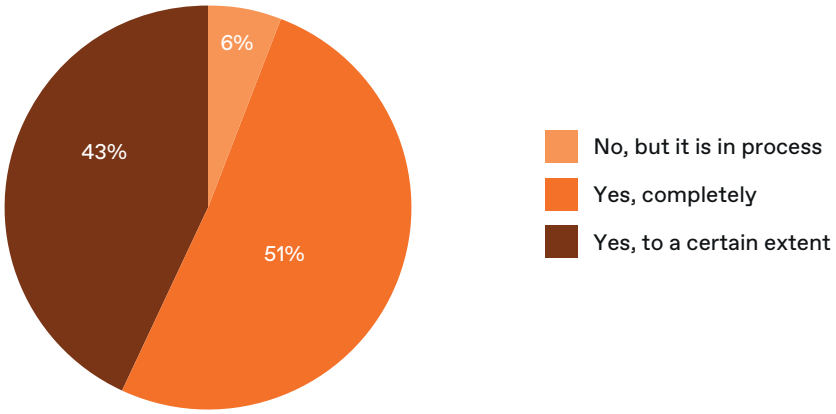
Nearly 70% of the hubs located in Catalonia perform both executive and decision-making functions in strategic aspects and are considered key players within the corporate group to which they belong.

43% of the hubs set up in Catalonia start out with the twofold role of executor and decision-maker. A further 32% started out with mainly operational functions but have evolved over time to position themselves within the corporate group as key players in decision-making. 23% retain their original role as executor, while only 3% have shifted from decision-maker to executor.

Evolution of the role of the hubs



Perception of the hub as a leader in the corporate group



“In 2024 we achieved significant growth in the offer of digital marketing and communication for Porsche. Our influence ranges from content creation and brand awareness to the creation of dynamic Porsche communities. Taking advantage of AI and automation technologies such as Power Automate, we have optimized back-office processes which allows our team to focus on creative and strategic initiatives. Going forward, we expect to explore innovative solutions to improve our operations and deliver greater value to our customers and partners.”

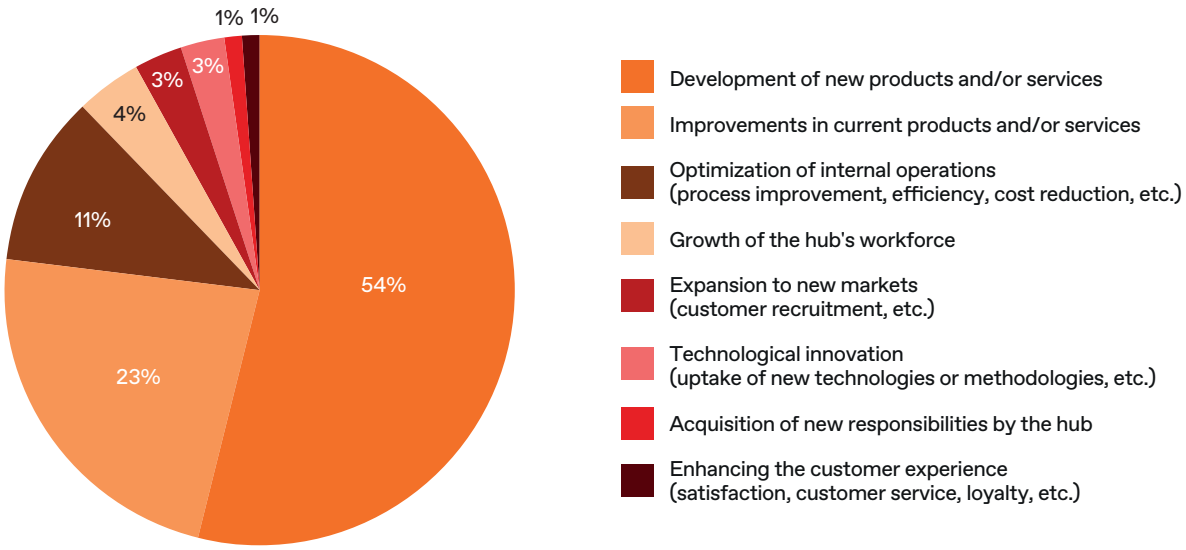
Scott Francis
Managing Director - Porsche Digital Spain

The main achievements of the hubs

2024 was marked by the hubs' efforts to continue developing new technological products and services.

In 2024 has also seen how the outstanding successes of all tech hubs in the year hinge on aspects directly related to their core business and the results they derive from technology production. The development of new products or services is ranked as the main goal (54%), especially by hubs in the mobility, healthcare and consultancy sectors, followed by improvements to current products and services (23%) and streamlining internal operations (11%).

The most outstanding successes of the hubs in 2024



“Last year, the Worldline Digital Competence Centre achieved significant milestones that will shape its evolution. Through areas such as mobile, web, e-commerce, conversational solutions, artificial intelligence and data, UX/UI and testing, the hub has reinforced its position within the Worldline Group. These advances drive innovation and efficiency, and allow the development of cutting-edge products and new digital solutions. Looking ahead to 2025, the team aims to continue growing, consolidating and improving even further to generate new opportunities and maintain leadership in the digital landscape.”

Santi Ristol
Director Digital Competence Centre - Worldline

6.
Talent characterization: The human factor driving technology

This section analyzes talent from two perspectives: A more global one based on the size of the hubs, and a second that takes a closer look at the characterization of professionals. It also points to any differences between management profiles and the rest of staff.

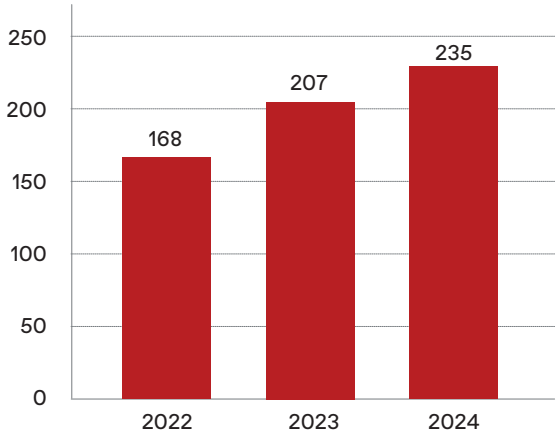
Talent characterization: The human factor driving technology

The size of the hubs' workforces

The average number of employees in tech hubs stands at 235 people, and half of the hubs have a more than 100-strong team in 2024.

The average size of the hubs has increased in relation to 2023, up from 207 to 235 employees, which shows once again their capacity for growth.

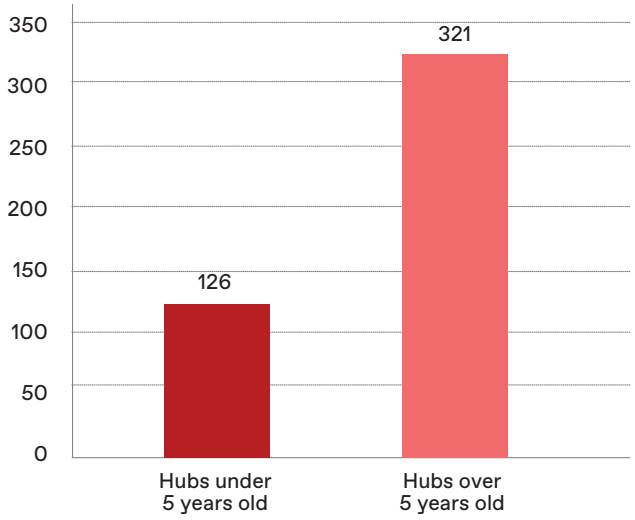
Average number of employees per hub



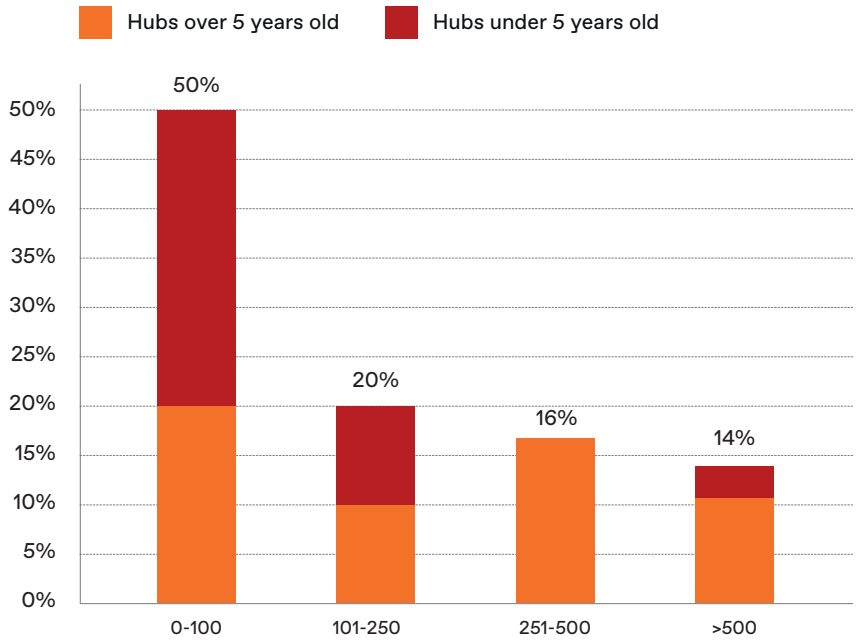
The newer hubs have an average of 126 employees, while those over 5 years old employ an average of 321 people, a contrast that shows how hubs grow and consolidate over time.

By 2026, a significant increase in the average workforce of the hubs is expected as 18% of hubs with fewer than 100 workers plan to go over this figure and evolve toward a higher segment.

Average number of employees by the age of the hub



Distribution of hubs by size[6]



[6] Relative frequency calculated for the total number of hubs for which this information is available.

“PepsiCo’s Digital Hub, with more than 350 employees, delivers outstanding results while the company continues to move forward in digital transformation. The teams take part in more than 30 global programs to make better decisions at all stages of the business. At the same time, our digital talent has evolved parallel to the growth and transformation of the company. We have improved in talent and diversity, with 43% female representation in the hub and celebrate the cultural diversity of more than 36 nationalities.”

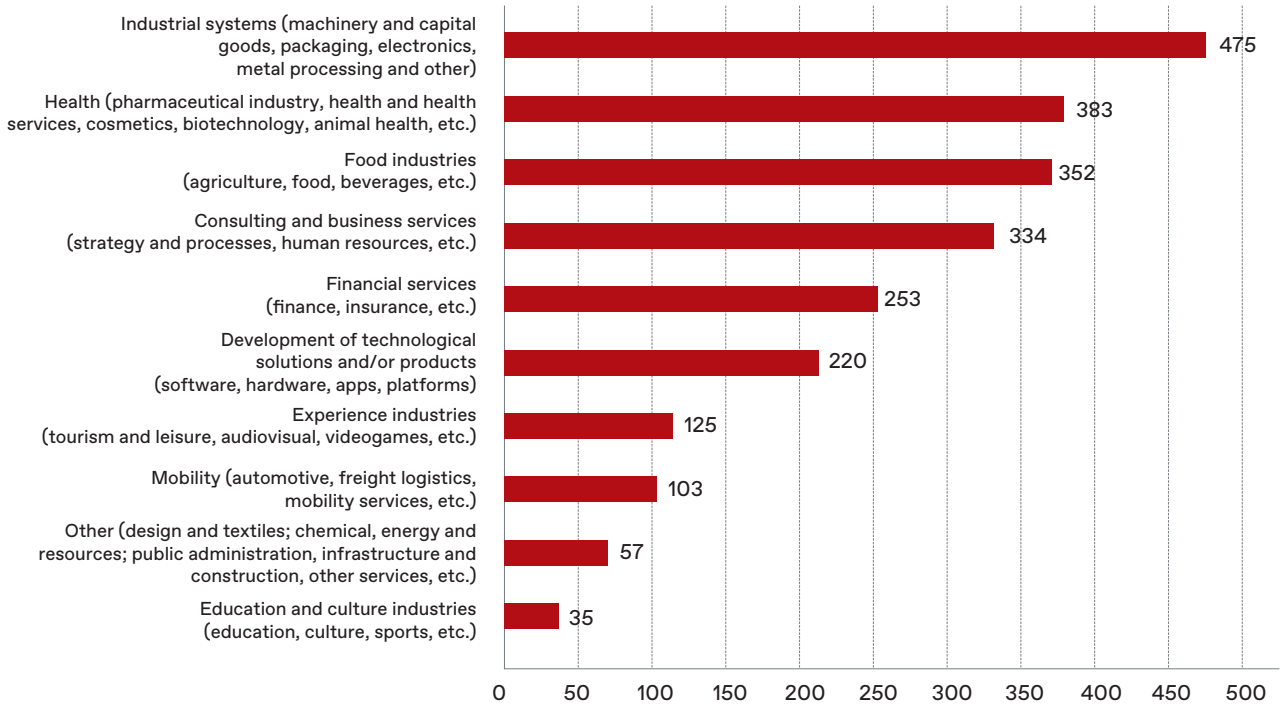
Gaston Besanson
VP Global Data Science and Advanced Analytics and Digital Hub Lead Spain - PepsiCo

Picture of jobs in the various economic sectors

The sector that generates the most employment in Catalonia is industrial systems, with 475 employees on average.

Along with the industrial systems sector, hubs in the health, food industries, and consulting sectors lead the list of those with the highest average number of employees. In fact, all four sectors exceed the overall average employment of tech hubs.

Average number of employees in hubs by sector



The most in-demand ICT profiles for hubs in Catalonia

The software engineer profile leads the ranking of the technology professions most sought after by the hubs established in Catalonia.

Demand for technological talent continues to rise with software engineer, consultant, and cyber security analyst at the forefront. Data analysis and management specialists, such as data analysts, data scientists, and data engineers, also stand out. This is additionally the case for professionals in videogame development, SAP professionals, business analysts and DevOps, who play an increasingly significant role in a highly digitized market.

Top 10 of the most in-demand professional profiles in tech hubs

- Software engineers
- Consultants
- Cybersecurity analysts
- SAP professionals
- Data analysts
- Videogame developers
- Business analysts
- Data scientists
- Data engineers
- DevOps engineers

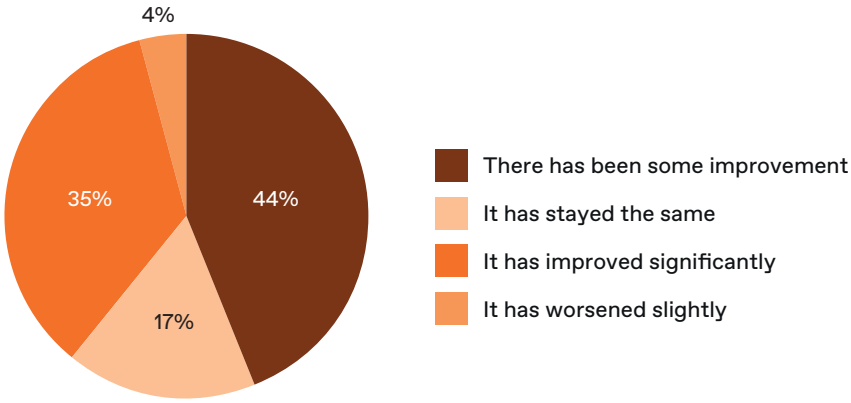
The presence of female talent in the hubs' workforce

Female talent accounts for 30.4% of the total workforce on average, a figure in line with sector data in Barcelona (30.64%)[7] and slightly above the European average (30.03%) [8].

Representation of female talent within tech hubs varies depending on the age of the hub. In hubs set up more than 5 years ago, the percentage of women averages 32.2% of the total workforce, a figure that shows the efforts of the most consolidated hubs to achieve gender parity. In fact, 78% have seen an improvement over time in terms of gender distribution. However, in the hubs set up in recent years, this figure falls to 28%.

These data are against a backdrop in which the female presence in university degrees and vocational training in ICT is still small at around 10-15% . This suggests that, despite the gender gap in training, tech hubs are currently above this threshold and shifting toward real inclusion.

Perception of the evolution of gender parity in the workforce



[7] Source: Mobile World Capital Barcelona (2024). *Digital Talent Overview 2024*

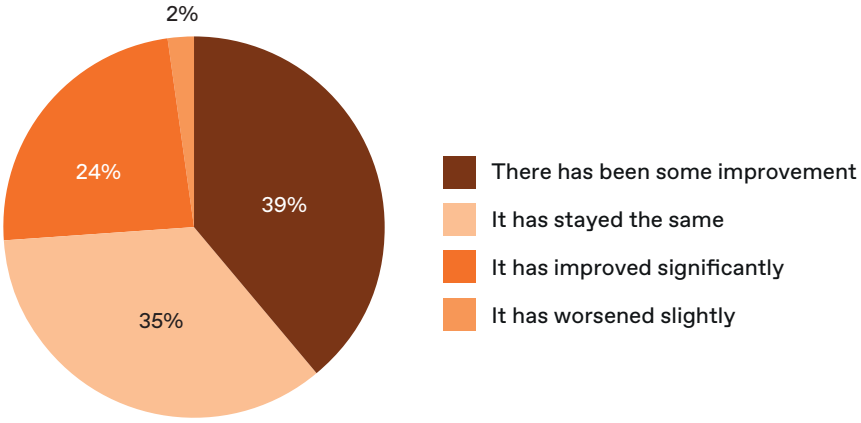
[8] Idem

[9] Source: Mobile World Capital Barcelona (2024). *Digital Talent Overview 2024* and Institut Català de les Dones (2023). Statistical Dossier: Women in ICT.

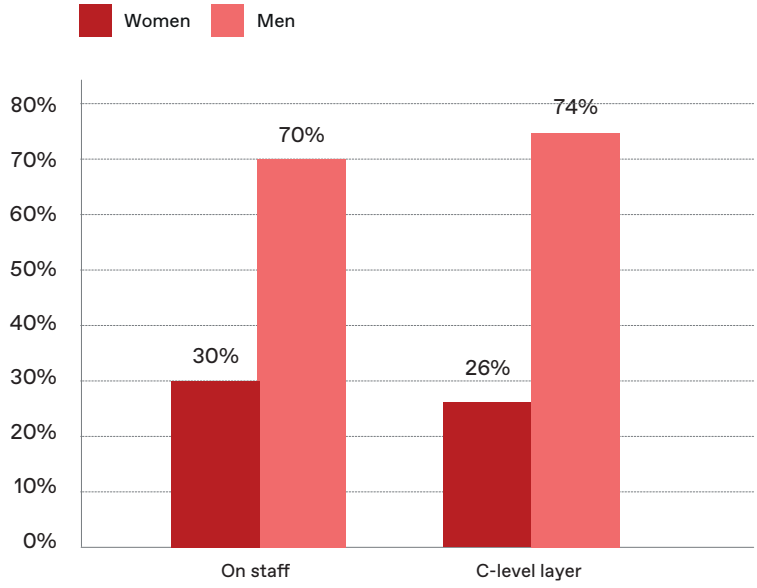
Women account for 26.13% of tech hub directors in Catalonia, a figure higher than the percentage of women on the boards of directors of Spanish ICT companies which is less than 25%[10].

In the tech hubs set up more than 5 years ago, this figure increases significantly and stands at 32.3%. By contrast, in the newer hubs, the percentage of female talent in managerial layers is down to 20.8%. The difference according to the age of the hub shows the efforts over time to move toward gender equity in leadership levels. Specifically, 63% of the hubs surveyed consider that progress has been made in gender parity in management layers since their creation to this day.

Perception of the evolution of gender parity in the managerial layer (C-level)



Female presence in tech hubs in Catalonia



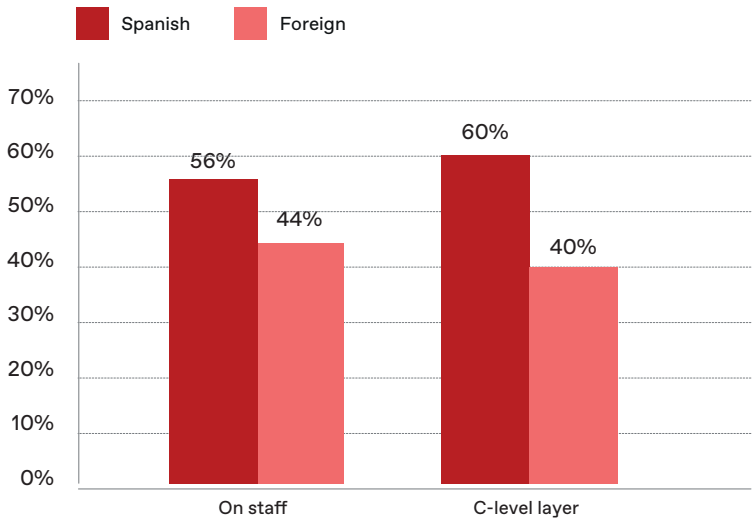
[10] Source: INFORMA (2024). Presence of women in Spanish companies

Diversity of origin in employees

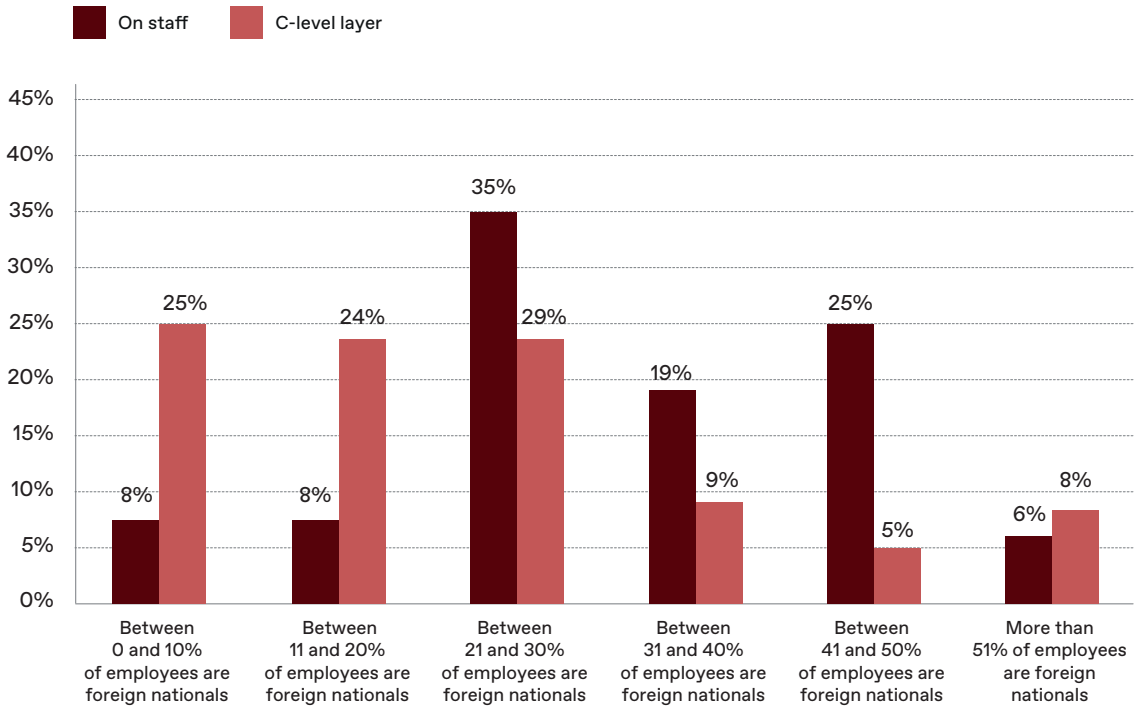
On average, 56% of the workforce of the hubs are Spanish nationals, a figure that rises in managerial layers to 60%

As for the origin of employees, no significant differences are observed between the newer hubs and those over 5 years within the general workforce. However, there are certain relevant trends within managerial layers. Thus, hubs set up more than 5 years ago have 63% Spanish national executives as opposed to 55% of the most recently founded hubs.

Average percentage of nationalities in workforce and managerial layer (C-level)



Proportion of hubs by nationality of employees



"Catalonia, and specifically Barcelona, is an excellent gateway to the world that helps us attract talent from any country. A place highly valued by professionals, who can develop their professional career with global impact from a location that improves their quality of life."

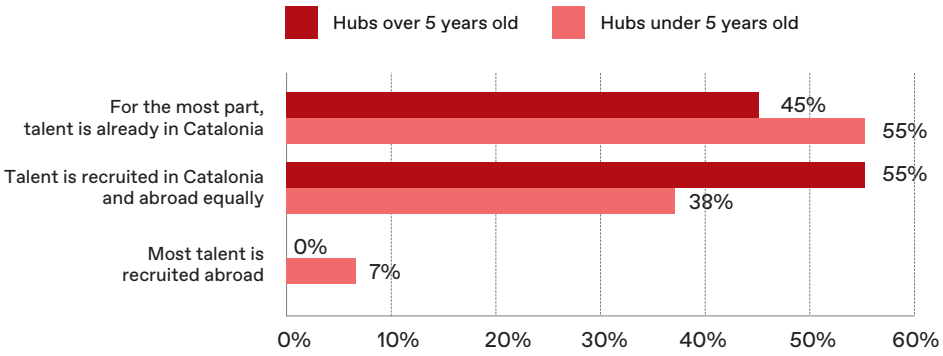
Jacinto Estrecha Cádiz
Head of Artificial Intelligence - NTT DATA Europe & LATAM

Attracting local talent

Highly qualified talent, one of the key factors in attracting hubs, is found to a greater extent in Catalonia according to 49% of respondents.

The availability of talent in the territory is even more relevant among hubs less than 5 years old (55%). By contrast, hubs over 5 years old say that they recruit talent equally in Catalonia and abroad at 55% of the answers.

Where does talent come from?



7.
The tech cutting edge: The core of the hubs

Technology changes, evolves, and transforms the environment and society at an ever faster pace. This section looks at technologies developed by the hubs and how they have evolved.

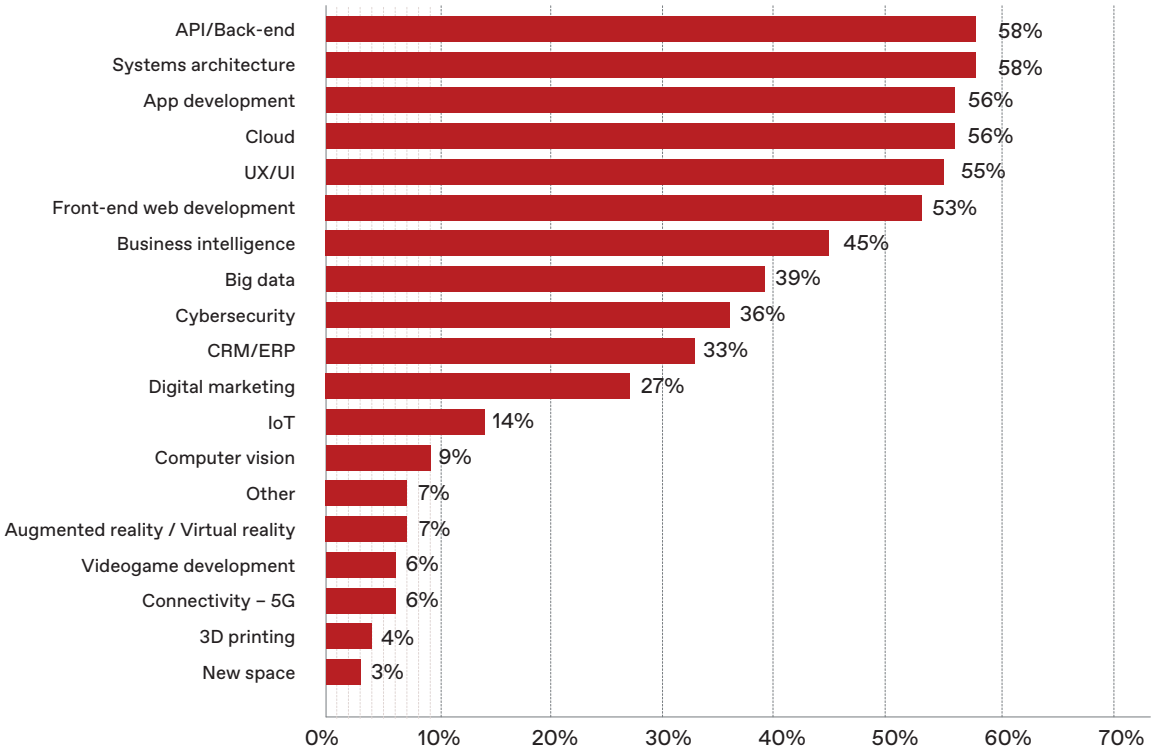
The tech cutting edge: The core of the hubs

The technologies developed by hubs in Catalonia

The technologies essential for software development, which contribute to the design, operation, and experience of apps, are the most representative.

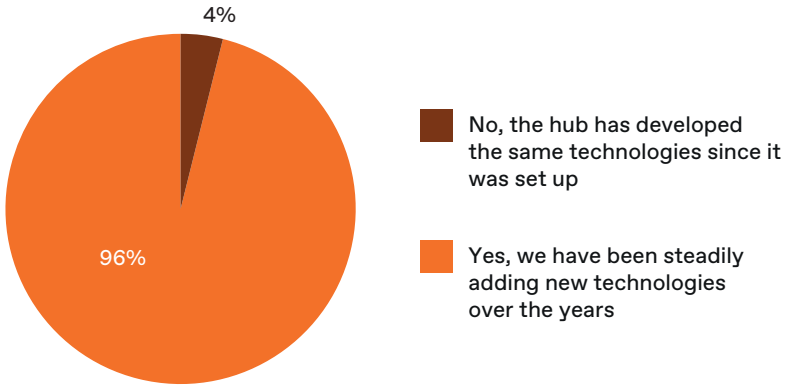
The hubs ecosystem of Catalonia maintains the technological diversity observed in the previous edition of this report. In fact, the catalog of the hubs' technologies has evolved upwards, and 70% of hubs expect this dynamic to continue. With regard to new trends, the **development of cloud technologies** is the area in which greatest growth is observed: From 45% in 2023 to 56% in 2024.

Hubs' specialization technologies

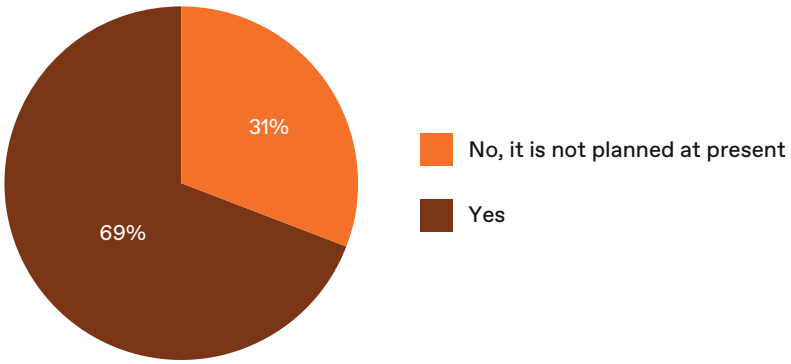


Over the years and up to the present, there has been a progressive increase in the **incorporation of new technologies** in the hubs' portfolio, as reported by 96% of respondents, and with prospects of this natural trend continuing in the coming years. The forecast is that 69% will incorporate new technologies in the next 3-4 years.

View of the past: "Has the hub been developing and acquiring new technologies since its inception?"



View of the future: "Is the hub expecting to acquire new technologies in the next 3-4 years?"



“Since the hub was established in Barcelona, we have achieved important milestones and gained confidence and recognition thanks to our contributions to Bayer’s transformation. This solid foundation has allowed us to expand to high value areas, such as R&D and the supply chain, taking advantage of exceptional local talent and innovative technologies. The evolution of the hub highlights its strategic role within Bayer’s global operations.”

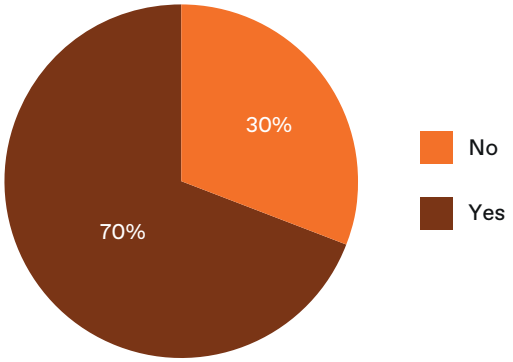
Marc Ferré Hausmann
Managing Director - Bayer GBS Barcelona

Deep tech and artificial intelligence: The commitment to technological innovation

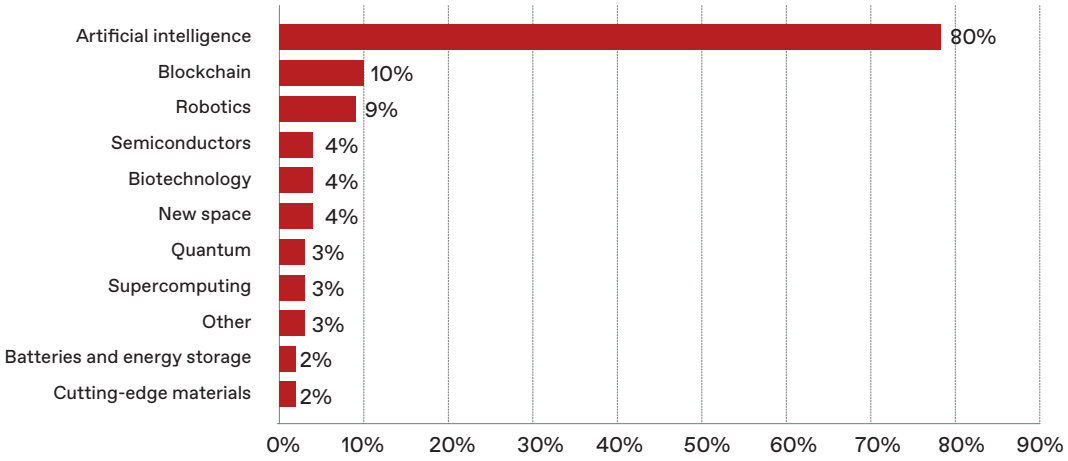
The deep tech segment has a strong presence in the hubs of Catalonia, and currently 70% develop one or more of these technologies.

With the focus on artificial intelligence (80%), projects related to generative AI hold a relevant place in the catalogue of services of the hubs. Blockchain (10%) and robotics (9%) have just rounded off the deep tech technology podium.

Proportion of hubs that develop deep tech



In what deep technologies do these hubs work?



“Salesforce’s commitment to Barcelona is firm and very focused on our new capabilities to create artificial intelligence players such as Agentforce. The uptake of this technology by companies will be exponential in the coming months. For this reason we have implemented a free AI training strategy in 2025 for everyone with the aim of increasing AI certification in the Salesforce ecosystem by 30%.”

Jordi Ossó
Regional VP - Salesforce Barcelona

8.
The hubs' commitment to sustainability

More and more companies recognize the importance of operating responsibly with the planet and with the communities where they perform their operations, thus meeting a growing social demand. This chapter explores the measures tech hubs apply in Catalonia to minimize their environmental impact while driving ethical, inclusive, and social labor practices.

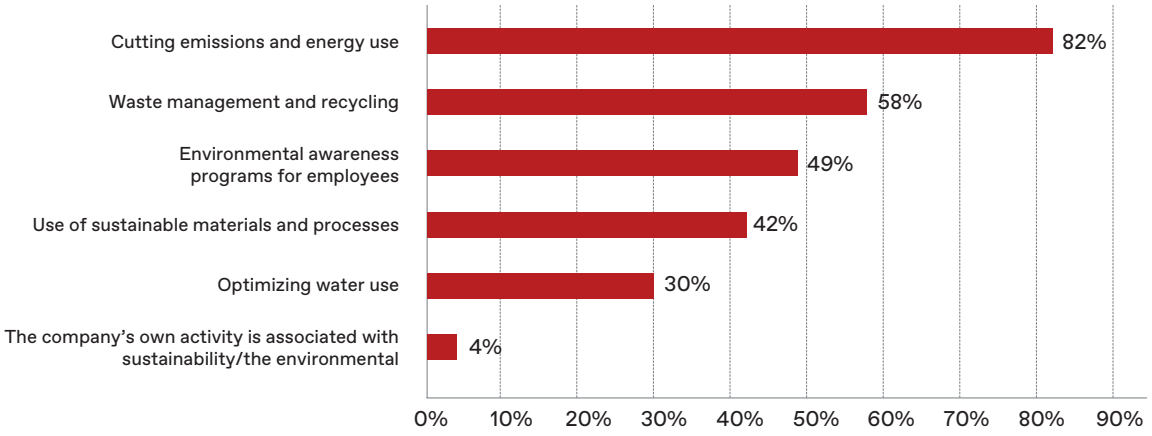
The hubs' commitment to sustainability

Environmental sustainability in hubs

About 80% of hubs prioritize the implementation of initiatives with a positive environmental impact.

Of the hubs that promote initiatives with a positive impact on the environment, 82% focused on reducing both polluting emissions and energy usage, while 58% have steered their efforts to more efficient and sustainable waste management.

Major environmental initiatives of hubs

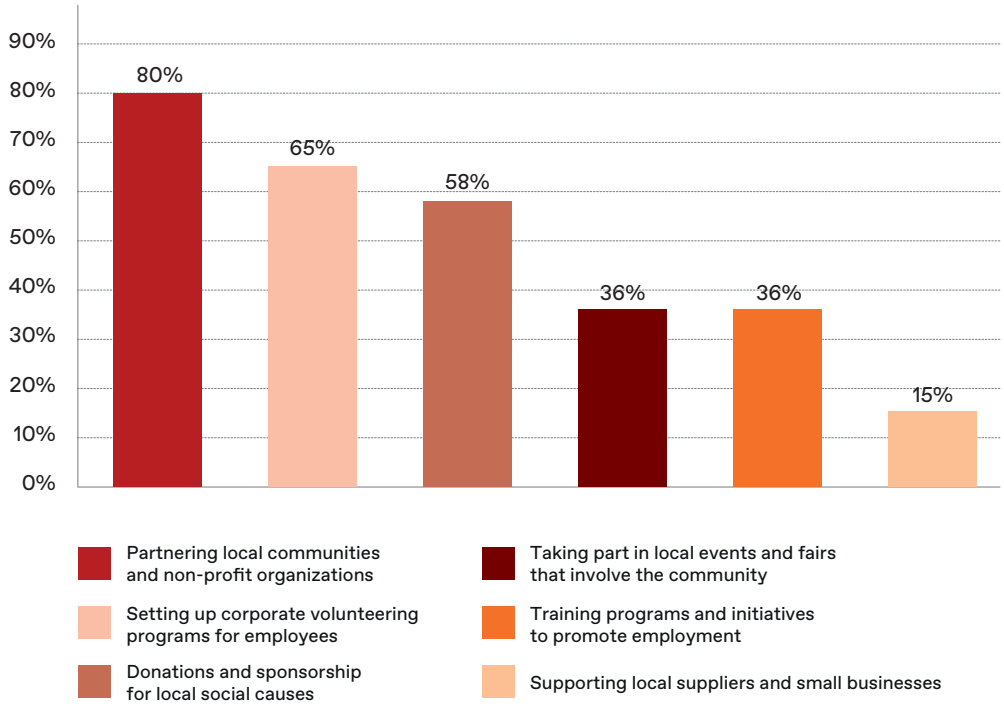


Social responsibility in the ecosystem

80% of the hubs in Catalonia participate in social initiatives that promote inclusion, well-being, and equal opportunities.

Among the most common social initiatives promoted by tech hubs in Catalonia, 80% collaborate with local communities, 65% promote voluntary programs, and 58% contribute donations and sponsorship to social causes.

The main social initiatives of the hubs



9.
The hubs in detail

IRP Systems Europe

Fran Ribas
Strategic Marketing Director

Key company data:

Company sector: Mobility (automotive, freight logistics, mobility services, etc.)

Key hub data:

Year hub set up: 2023

Location: Avinguda Parc Logístic, 22-26, edif. B, local 2, 08040 Barcelona

Scope: Europe and Asia (India)

Number of employees: 12

Percentage of female employees: 13 %

Percentage of female Percentage of foreign staff: 13 %

Technologies developed:

- Electronic systems architecture
- Big data

Other technologies:

- Electrification

Hub description:

IRP Systems' hub focuses on the **development of technological solutions for electric mobility.** The hub **designs and supplies essential components** for electric vehicle manufacturers, such **as electric motors, electronic controllers and control software**, with a strong focus on innovation and sustainability.

After its initial success and with the aim of expanding in Europe, IRP Systems picked **Barcelona as the core of its internationalization** attracted by the talent it offers in the automotive industry, proximity to customers and high quality of life. It has also become the **nerve center for decision-making** with the board of directors working out of the same facilities.

Filtered and bounded The hub additionally integrates the latest technological advances in the industry from its strategic base in Barcelona. This includes innovations such as **Open Winding** technology, which increases the overall efficiency of engines, and the integration of **artificial generative intelligence**, with projects under development for advanced data processing and the provision of new features to customers.

IRP Systems Europe

The **commitment to innovation** has enabled the hub to post exponential growth and it has doubled its turnover annually owing to the acquisition of new customers, the expansion of programs, and the development of new business lines.

With the EU target set for all new vehicles to be 100% electric by 2035, IRP Systems is **well positioned to lead the industry and shape the future of mobility with advanced technology solutions from the heart of Barcelona**.

Successes of the last year:

Technology:

- **Building key customer loyalty by establishing trusted relationships and new product launches**

  One of IRP Systems' greatest successes has been to consolidate the relationship with key customers, such as Silence and Mahindra, by forging bonds of trust and contributing to joint new product releases. Outstanding examples include the release of cars, microcars, scooters, auto rickshaws and trucks up to 3.5 T, thus expanding their supply and positively impacting the mobility sector.
- **IRP Systems' consolidation as a leading supplier of automotive components: A crucial success story driving expansion in the European market in 2024..**

Talent:

- **Talent acquisition: The key to fostering a fully capable R&D laboratory**

  Recruiting specialized talent, setting up a fully equipped R&D laboratory with the capabilities to perform all tests required. For example, the sales and engineering team in Barcelona has been instrumental in this growth and has cemented its role as an essential mainstay of the company's continuous innovation.

Vision and perspective of the hub's future:

In the short term, not only will product launches be prioritized for key customers but the portfolio will also be expanded with **high voltage components** and **new segments** will be explored such as scooters and light trucks. Furthermore, the hub seeks to **consolidate the team in Barcelona** by ramping up both operations and commercial activities.

In the medium and long term, the hub aims **to lead the electric mobility industry** by delivering competitive components that unlock accessible and sustainable mobility. To achieve this goal, the hub is committed to **bringing in innovative technologies** such as advanced control software and **generative artificial intelligence**. The plan further includes expansion in Europe to set up new partnerships in electrification coupled with diversification in the supply of products to dovetail with new customers' needs.

"From Barcelona, IRP Systems leads the sustainable growth of electric mobility backed by a resolute commitment to innovation and the green future."

MediaMarkt

Xavier Morejon Balta
MediaMarkt Tech Hub Director

Key company data:

Company sector: Retail (consumer electronics)

Key hub data:

Year hub set up: 2021
Location: El Prat de Llobregat i Barcelona
Scope: Europe, in a total of 11 countries
Client: The MediaMarkt Group
Number of employees: 140
Percentage of female employees: 18 %
Percentage of female Percentage of foreign staff: 46 %

Technologies developed:

Main:

- Frontend Web Development
- API/Backend
- CRM / ERP

Other technologies:

- App Development
- Systems architecture
- Cybersecurity
- Augmented reality / Virtual reality
- Digital marketing
- UX/UI
- Business Intelligence
- Artificial intelligence
- Cloud
- Big data

Hub description:

The tech hub is an innovation center that delivers **technological solutions across the MediaMarkt Group**. It operates in two main areas: Firstly, maximizing operational efficiency and optimizing processes within the organization, a task in which the improvements achieved in finance and logistics stand out. Secondly, it supports the design and development of products with a direct impact on end consumers such as the website, app and various point-of-sale solutions.

Technologies include cloud computing solutions and advanced data analytics (big data). It also develops emerging technologies to optimize both the user experience and processes. In addition, it has a permanent team specialized in artificial intelligence.

IRP Systems Europe

Over time, it has been consolidated in **product management**[1], which has significantly enhanced collaboration with the various business units. Currently, it not only leads project implementation but is also taking on growing responsibility in setting strategic priorities. This evolution has brought it a key role in decision-making and a decisive strategic influence in MediaMarkt's future.

Finally, there is MediaMarkt's "Better Way" environmental sustainability strategy which involves three objectives: Lessening the environmental impact of the operations generated by the business; offering consumers more sustainable products and services, and enhancing social commitment.

The hub's successes over the last year:

Technology

- **Website and app presence in the 11 markets in which they operate**

  One of the great milestones has been the implementation and deployment of the corporate website and app in all the markets where MediaMarkt operates. This expansion has made it possible to reach a wider audience since it has improved accessibility to the company's products and services.

- **Migration to the cloud infrastructure**

  The transition to a cloud infrastructure has been decisive for the company: It has provided flexibility and scalability and has facilitated adaptation to variations in market demand. In addition, it has significantly improved operational efficiency, enabling better management of large volumes of data and offers more agile and effective solutions to technological challenges.

- **Improved logistics and delivery services**

  During 2024, it introduced new technologies and more agile processes in logistics. These innovations enables products to be distributed quicker and more efficiently which means customers get their orders earlier and better.

- **Enhanced omnichannel strategy**

  A major breakthrough has been made in the omnichannel strategy, ensuring a seamless and consistent shopping experience across all available channels. Whether customers choose to shop online or in brick-and-mortar stores, service is more integrated, personalized, and higher quality, resulting in easier information exchange and enhanced customer interaction.

Talent

- **Workforce expansion and more strategic influence**

  In the last 12 months, the workforce has doubled to 140 employees. This growth has been fundamental to gain prominence in the group's digital transformation strategies and cement the hub as a key player in change and innovation processes.

Vision and perspective of the hub's future:

Looking to the future, the tech hub's objectives are to fully consolidate its role within the organization, keep growing, and bolster its reputation within the group by maximizing the value it brings.

One of the main work strands in this respect operates on the principle of the user at the center and thus seeks to design an end-to-end, cross-border experience for all MediaMarkt customers in Europe.

"2024 has been the year when the hub's consolidation within the MediaMarkt Group has been most evident, resulting in expanding staff numbers and growing strategic influence on decision-making."

[1] Department responsible for defining the product vision, setting feature priorities, and ensuring that the final product aligns with customer needs and company goals.

SEAT CODE

Isaac Partal Calvo
CEO of SEAT CODE

Key company data:

Company sector: Mobility (automotive and mobility services)

Key hub data:

Year hub set up: 2017

Location: Carrer Badajoz, 97, 08018 Barcelona

Scope: Global, in more than 70 markets where the brands CUPRA and SEAT operate

Client: Seat, CUPRA, other Volkswagen Group brands and mobility service operators

Number of employees: 280

Percentage of female employees: 38 %

Percentage of female Percentage of foreign staff: 21 %

Technologies developed:

Main:

- Software Development
- UX/UI
- Digital marketing (Search & Content)
- Artificial intelligence
- Big data

Other:

- API/Backend
- App Development
- Frontend Web Development
- Cloud & Platforms
- CRM / ERP
- Business Intelligence

Hub description:

Seat CODE, originally known as the Metropolis Lab, was set up as the mobility innovation center for the Volkswagen Group. It works collaboratively with other group companies and brands. SEAT CODE is now the leading digital hub for CUPRA and SEAT, **driving digital transformation through innovation and the development of technology products and services for mobility.**

The hub mainly targets two aspects in this digitization process: Firstly, **enhancing the user experience**, such as developing infotainment apps for CUPRA and SEAT vehicles, and all the customer's digital touchpoints with the brand; and, secondly, **optimizing commercial operations** (sales, after-sales and marketing) through data exploitation. Machine learning models enable SEAT CODE to deliver increasingly precise solutions tailored to customer needs.

SEAT CODE

The hub is made up of a highly qualified team of almost 300 people in which 38% are female professionals in both the management layer and in the rest of positions; a highly positive aspect in the automotive and tech industries where the gender imbalance is usually more marked.

The hub's successes over the last year:

Technology

- **SEAT CODE: Strategic hub in the development of commercial solutions for SEAT and CUPRA**

  In 2024, SEAT CODE has cemented its leadership in the development of digital solutions for SEAT and CUPRA and achieved significant milestones: 85 projects completed since its inception in the last 5 years; 9 projects added to the CODE portfolio in 2024, which steps up its innovation capacity; and 36 active initiatives addressing key areas such as digital business, sales, after-sales, and marketing.

Product

- **Giravolta: The SaaS solution for all mobility service operators both inside and outside the Volkswagen Group**

  Giravolta is a multimodal mobility platform developed by SEAT CODE that has more than 500,000 users and has already operated in more than 5 million trips. It is a SaaS (software as a service) solution that allows mobility operators to digitally manage vehicle fleets, whether cars, motorcycles, bicycles, or electric scooters, and provides multimodal and multi-product mobility services. This project is a fine example of how digital transformation can unlock efficiency and flexibility in the sector.

Talent

- **Consolidation of the hub with annual growth coming to 30% until 2024 and hiring 39 new members over the last year.**

  The hub has seen significant growth within the Volkswagen Group and has become a leader in innovation and mobility. Since its inception as SEAT Metropolis Lab, SEAT CODE has experienced annual growth coming to around 30%: It has gone from 20 to 280 professionals. In 2024, 39 new jobs were created.

Vision and perspective of the hub's future:

The main challenge for SEAT CODE's new strategy is to achieve end-to-end responsibility (from design to deployment and operation) for all digital products (both SEAT S.A. and SEAT CODE). The following factors will be pivotal in achieving these goals:

- Expanding **digital capabilities** by taking on multidisciplinary profiles specialized in research, operations, and user experience.
- Specifying UX/UI aspects anchored in **business requirements and user feedback.**
- Maintaining and improving **delivery quality and speed**, emphasizing high performance equipment.
- Having the ambition to generate a real impact in the digital mobility sector, contributing to the **transformation of SEAT, S.A. and the market, and positioning SEAT CODE as a leader** in the creation of innovative solutions.

"The real potential of digitalization in the automotive industry has been discovered, which at the same time paves the way for more efficient and sustainable mobility."

Airbus

Roser Roca-Tohà
CEO of the Airbus Tech Hub
in Barcelona, Airbus GeoTech.
Winner of the DonaTIC 2024 Award

Key company data:

Company sector: Aerospace

Key hub data:

Year hub set up: 2007

Location: Carrer Entença 95, 08015 Barcelona

Scope: Global

Client: Government, international organizations, and private clients

Number of employees: 40

Percentage of female employees: 38.8%

Percentage of female Percentage of foreign staff: 5.2%

Technologies developed:

- New Space
- Computer Vision
- App Development
- Systems architecture
- Business Intelligence
- Artificial intelligence
- Cloud
- Big Data

Hub description:

Airbus GeoTech, Airbus's tech hub in Barcelona, was set up with the aim of providing **radar imaging services and digital mapping services in the territory**. Over time, these activities have evolved and mapping has been consolidated as the core business of the hub, especially in the **creation of digital maps in 2D and 3D.**

The hub not only develops digital technologies to extract information from images but also can also program Airbus satellite constellations to obtain the most relevant images. The Barcelona subsidiary is one of the few Airbus entities authorized to **distribute the images captured by its Earth observation satellites**, which reaffirms its key role in the sector.

Currently, the hub specializes in **geospatial digital technologies and geoinformation,** and focuses on the **transformation of data obtained from images captured by satellites, drones and planes,** whether stratospheric or lower level. Through sophisticated digital processes, these images become **actionable data**, enabling innovative and efficient solutions in all types of markets. This specialization has allowed the hub to develop **outstanding expertise** and consolidate a relevant **regional, national, and international** presence while becoming a benchmark in geoinformation within the group.

Airbus GeoTech

The Airbus GeoTech hub also reinforces the **commitment to sustainability**, fully aligned with the decarbonization strategy for the aerospace industry. Following Airbus's commitment to innovate in aircraft with sustainable engines, the hub is investing in a revolutionary **solar electric drone which is neutral** in CO_2 emissions, designed for Earth observation from the stratosphere. This drone guarantees clean propulsion and is 100% reusable.

The hub's successes over the last year:

Technology

- **Airbus decides to consolidate in Barcelona the R&D or industrial project for observation of the Earth from the stratosphere by Airbus Defence & Space**

  An outstanding success for Airbus's tech hub in Barcelona has been the contribution to Airbus Defence & Space's R&D project, focusing on the **development of technology for Earth observation from the stratosphere.** Through this collaboration in proofs-of-concept and operations, the hub **designed and manufactured the first five payloads** for this technology.

  Thanks to the success achieved and the operational capacity demonstrated by the hub, Airbus decided in 2024 **to transfer part of R&D and manufacture of this technology to the subsidiary in Catalonia.** This decision is an outstanding opportunity to consolidate Barcelona as a benchmark in aerospace technology.

- **The European Space Agency's trust in Airbus's tech hub**

  One of the hub's major milestones has been the **trust placed in it by the European Space Agency (ESA),** which has commissioned it to work jointly on **advanced projects for Earth observation from the stratosphere** both at sea and on land. This project will also feature the involvement of local professionals and users in Catalonia, thus helping to make the Catalan public ecosystem more vibrant.

Talent

- **Committed to female talent**

  In the last two years, the tech hub has **invested heavily in female technological talent** and achieved significant progress in gender balance. Almost **40% of its workforce is made up of women**, a remarkable achievement that reflects its commitment to diversity and gender equality.

Vision and perspective of the hub's future:

As a result of Airbus's decision to **fully transfer the development of key technology for Earth observation from the stratosphere**, the tech hub is looking towards a future packed with challenges and opportunities.

The main goal is **to cement this new work strand** with the challenge of developing the **new next generation payload**. This new technology, anchored **in cutting-edge innovations**, will be designed and built from scratch incorporating new advanced technological features.

"Airbus GeoTech, a leader in the Earth observation from the stratosphere technology market, saw significant growth in geospatial data services in 2024."

Towa International

David Peix
CEO of Towa International

Key company data:

Company sector: Health
(pharmaceutical industry and health services)

Key hub data:

Year hub set up: 2020

Location: Carrer Sant Martí, 75 - 97,
08107 Martorelles (Barcelona)

Scope: Global

Client: Subsidiaries of the company and marketing and manufacturing for third parties

Number of employees: 912

Percentage of female employees: 42 %

Percentage of female Percentage of foreign staff: 16 %

Technologies developed:

- App development
- Cybersecurity
- Cloud
- Front-end web development
- Augmented reality / Virtual reality
- Big Data
- CRM/ERP
- Digital marketing
- Business intelligence
- Artificial intelligence

Hub description:

The hub was set up in Barcelona in 2020 as part of the internationalization and diversification strategy rolled out by Towa Pharmaceutical, a leading generic medicine company based in Osaka, Japan. Its core business is **developing and distributing generic value-added medicines**, increasingly focused on diversification into new sectors such as cancer drugs. These initiatives are led from Barcelona as a site carefully chosen by the Japanese head office. This is all under the umbrella of the mission of ensuring **universal access to quality medicines at affordable prices for people and public health systems.**

Towa International

The hub has a **plant dedicated to research and development (R&D)** which **develops new pharmaceutical formulas, validates products,** and **enhances production processes.**

Today the hub operates holistically on **a global scale and manages operations in various international markets**, directly in Spain, Italy, Portugal, and the United States through commercial subsidiaries, and indirectly in more than 30 markets across all continents.

Towa International's hub pursues its strategic objectives with respect for the environment and people based on three ESG pillars which include milestones such as cutting emissions by 50% by 2030, fostering an inclusive and equitable culture focused on its employees, and cementing its position as a transparent and responsible company.

The hub's successes over the last year:

Technology

- **Towa's tech hub in Barcelona leads the development of modified-release drugs**

  Towa's hub in Barcelona has developed **pelletization or modified-release drug technology**, designed to ensure they last longer in the body. This innovation, which is a groundbreaker in Europe, has cemented Towa's position as a leader in the industry. Products are already being developed with this technology for export to Japan, demonstrating the hub's efficiency and influence in international markets.

Talent

- **The evolution of Towa's hub: From an operational center to an international center of excellence**

  One of the hub's great achievements has been its impressive evolution since its inception in 2020: It has built up a workforce of more than 900 professionals in just 5 years. Originally designed to provide transactional support to the business, Towa's hub has turned into high-performance international center of excellence specializing in product development, business intelligence, and operational strategy.

Vision and perspective of the hub's future:

Towa is looking to the future with a twofold objective: Firstly, to continue driving the development of value-added, quality generic drugs, and secondly to establish itself as a **leader in solid oral cancer treatments** with the commitment to meeting an essential medical need and enhancing the quality of life of patients around the world. To achieve this, Towa is building **plants specialized** in these products equipped with **advanced isolation technologies** to ensure utmost safety.

"Today we have begun to develop the medicines that as patients we will need in the future."

Allianz Technology

Gerard Esparducer
Head of the Spain Hub – Allianz Technology

Key company data:

Company sector: Financial services (finance, insurance)

Key hub data:

Year hub set up: 2017

Location: Avinguda Icària, 199, 08005 Barcelona

Scope: Global

Client: Mainly the Allianz Group's global business units

Number of employees: 583

Percentage of female employees: 40 %

Percentage of female Percentage of foreign staff: 51 %

Technologies developed:

- API/Back-end
- App development
- Systems architecture
- Big data
- Cybersecurity
- Cloud
- Front-end web development
- UX/UI
- Business intelligence
- Artificial intelligence

Hub description:

Allianz Technology's tech hub in Spain is engaged in delivering end-to-end technology solutions for the Allianz Group. From its foundation in 2017 to the present, it has evolved to position itself as a strategic decision-making core for the multinational. With a highly qualified team of more than 600 people of 61 nationalities, the hub stands out for its ability to attract and develop talent.

Currently, it pivots around two key areas:

- **Developing digital solutions for the entire Allianz universe:**

  The tech hub **promotes innovative technological solutions** for the entire Allianz ecosystem, such as the implementation of artificial intelligence in call centers. These solutions are designed to bring value to **end customers, intermediaries, partners** and **professionals**. This area accounts for about **60% of the hub's activity.**

- **Development of global internal services for Allianz Technology:**

  The **remaining 40%** of the tech hub's activity involves supporting **Allianz Technology**'s internal operations and covers areas such as **operations, finance, risks,** and **global services.** Although these solutions are deployed internationally, the **tech hub** works especially for the headquarters in Munich (Germany) as a direct extension of the head office to ensure efficient operation on a global scale.

The hub's successes over the last year:

Technology

- **Conversational AI: The solution that harnesses high technology to improve customer service in call centers**

  The implementation of conversational AI at Allianz's tech hub has been a great success and has become one of the **most outstanding innovations within the company's global operations.** This application has made it possible to automate processes and improve efficiency in internal communication and with customers, facilitating the resolution of incidents and quick responses.

- **The Barcelona hub is essential in People Analytics for the Allianz Group**

  A major milestone for the **Barcelona tech hub** is leading the **People Analytics** division for the entire Allianz Group. From here, a specialized team conducts data analysis for the more than 100 companies in the group and the more than **157,000 employees** worldwide.

Talent

- **The consolidation of Allianz's tech hub in Barcelona as a global benchmark in digital solutions and strategic decision-making**

  One of the tech hub's main achievements owing to the work done in both digital solutions and global services has been its **designation as the company's strategic hub in Europe.** This recognition has resulted in the **relocation of global teams and executives** who lead from Barcelona the process of defining and making key decisions for all the countries in which they operate.

Vision and perspective of the hub's future:

The hub seeks to leverage the huge volume of data generated by the Allianz Group to forge strategic partnerships with the city's innovation ecosystem and institutions. It aims to harness Barcelona's technological resources and talent to unlock advances in data analytics and management to drive innovation.

Allianz has a clear vision for the future: Creating **scalable global solutions.** These solutions will be aimed at improving productivity and globalizing services while maintaining the flexibility needed to accommodate the special features of each market.

This vision cements the Barcelona tech hub as a key piece in Allianz Technology's strategic development. This is why the hub is evolving into a global decision-making center, a role that goes beyond the traditional hub concept.

As for **growth and talent,** the tech hub has ambitious plans: Doubling its workforce over the next **2-3 years** and reaffirming its commitment to innovation and its position as the nerve center of Allianz Technology.

"The Allianz Technology hub is evolving into a global decision-making center, moving beyond the traditional hub concept and cementing its position as a key strategic location for the Allianz Group."

Akzonobel

Sergio Olivas
Manufacturing Director EMEA Liquid Coatings

Key company data:

Company sector: Decorative paints, industrial paints, and specialized chemicals.

Key hub data:

Year hub set up: 2021

Location: Carrer Feixa Llarga, 14-20, 08040 Barcelona (Zona Franca)

Scope: Global

Client: Mainly the different global business units of the Allianz Group

Number of employees: 149

Percentage of female employees: 45%

Percentage of female Percentage of foreign staff: 32%

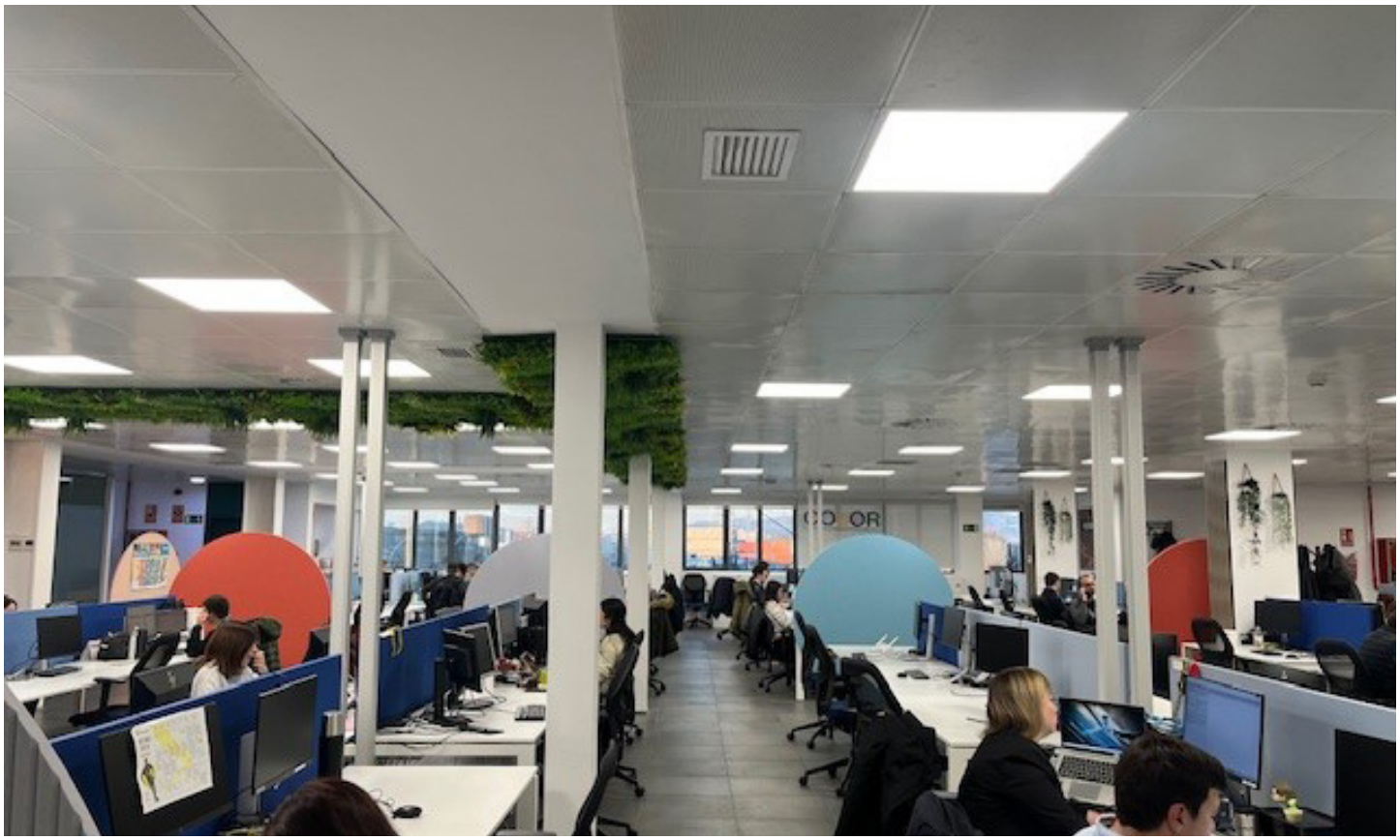
Technologies developed:

- Front-end web development
- API/Back-end
- App development
- Systems architecture
- ERP
- Business intelligence
- Big data
- Augmented reality / Virtual reality

Hub description:

AkzoNobel's tech hub was set up with the purpose **of integrating and centralizing key operations of the parent company,** such as **planning, logistics,** and **raw materials management** including the technological development needed to support these functions. For example, the hub is committed to rolling out advanced solutions such as data lakes and harnessing data analytics to improve data visibility and enable informed decision-making.

These operations have been mainly centralized in two strategic locations: Barcelona and Sassenheim. The attraction of talent, the vibrant and robust business environment, and institutional opportunities were some of the most decisive variables for the selection of Barcelona as its headquarters.



With **two main areas**, the hub is considered a specialized supply chain center:

- The first, **the planning hub**, in charge of planning and centralizing the production of raw materials for various business units. Its main function is to **standardize processes and apply good practices** with the aim of optimizing operational efficiency while eliminating duplication and inefficiencies.
- The second, the ***Logistic Control Tower***, is responsible for centralizing all logistical activities and **cloud data management** associated with the EMEA (Europe, Middle East, and Africa) region including transport and storage.

The hub's successes over the last year:

Technology

- **Internalization of the Control Tower with 4PL (fourth-party logistics): An investment in operational efficiency and maturity**

  The Control Tower, which was previously outsourced, has been integrated with 4PL, a change that reflects a significant degree of maturity. This evolution has made it possible to implement substantial improvements in supply chain indicators and optimize the efficiency of logistics processes.
- **Consolidation of automotive R&D: Driving innovation with entrepreneurial spirit**

  Automotive production and R&D has been consolidated in AkzoNobel by establishing a strategic center for the development of innovative solutions. This success reflects a strong entrepreneurial spirit with a resolute focus on exploring new initiatives and tackling challenges with creativity.

Talent

- **The hub: A strategic center for the development and retention of internal talent**

  The hub has been consolidated as a key center for the **development of internal talent,** as it has allowed professionals to interact with various business units. This exposure to different operational areas encourages talent retention and promotes professional growth within the organization.

Vision and perspective of the hub's future:

Looking to the future, the hub seeks further stabilization and consolidation by tapping **new digital tools and unlocking greater automation and efficiency**. For example, one of the initiatives in the organization's global roadmap is rolling out a tool designed for **end-to-end planning.**

This tool will be embedded across the entire demand chain, delivering a complete view of the process and enhancing the user experience in the use of systems.

The hub's main priority is to **make it an attractive environment for talent** with the aim of becoming a **benchmark within its sector.**

"A major success of AkzoNobel's tech hub has been the internalization of the Control Tower with 4PL. This milestone has led to a substantial improvement in operational efficiency, reflected in supply chain indicators."

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