

Ecosystem of Start-Up in Spain

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Growing Number of Start-Up Businesses in Spain

DIGITAL STARTUP ECOSYSTEM OVERVIEW 2017
SPANISH STARTUP ECOSYSTEM

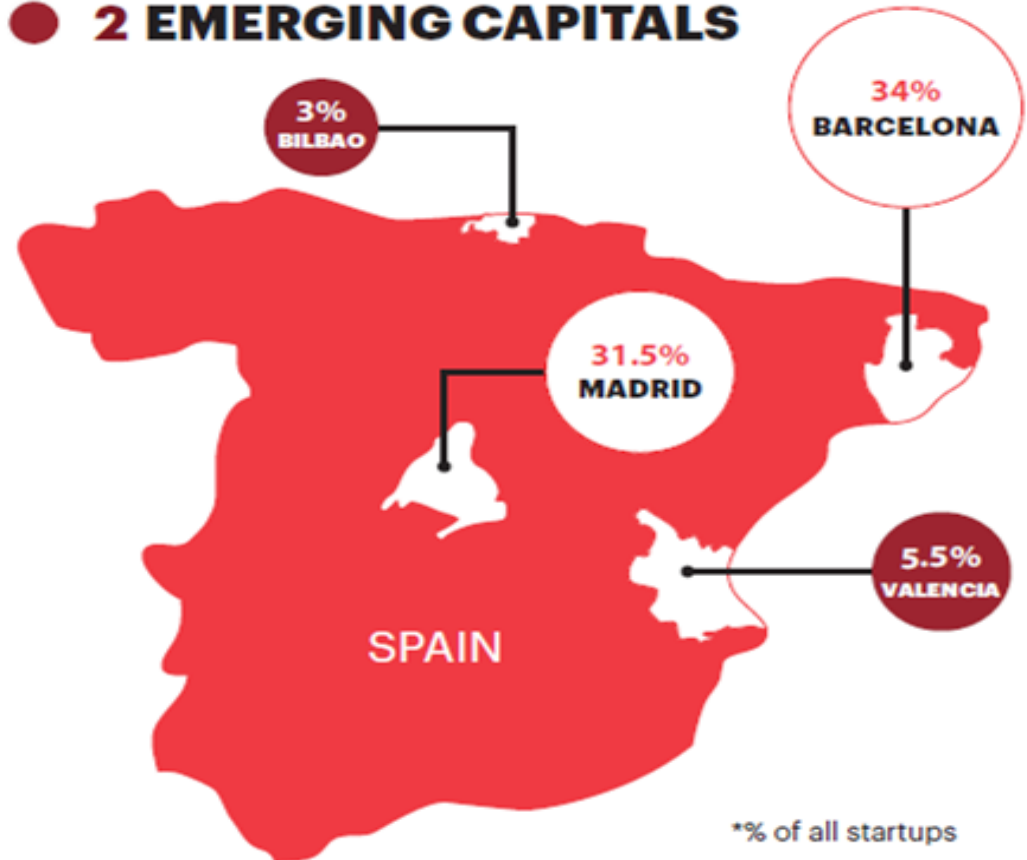
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STARTUPS IN SPAIN IN 2017

The Spanish startup community has grown around 20% with respect to the previous year (2.663 in 2016).

Barcelona remains at the head while Bilbao asserts its position as an emerging capital and already accounts for 3% of all Spanish startups.

○ **2 MAIN HUBS**
● **2 EMERGING CAPITALS**



Source: Crunchbase (Although this report gathers and analyses information from different sources (Pitchbook, Dealroom, Startup Explore, or Atómico among others), all of them considered benchmark studies for the startup ecosystem, MWCBarcelona has selected Crunchbase as the main database in order to give consistency to the data exposed in this report).

Growing Number of Start-Up Businesses in Spain

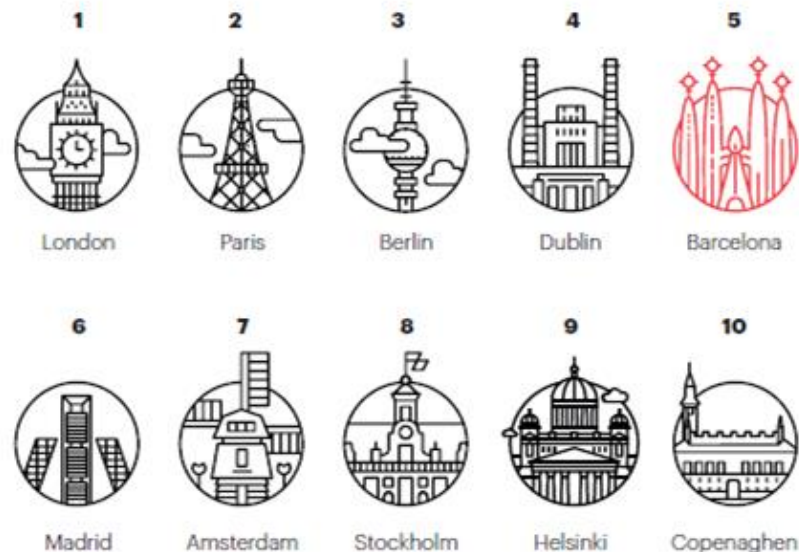
DIGITAL STARTUP ECOSYSTEM OVERVIEW 2017
SPANISH STARTUP ECOSYSTEM: **EUROPEAN TECH HUBS**



European hubs ranked by number of startups

AROUND **78 TECH HUBS** IN EUROPE

Barcelona and **Madrid** stand among the **Top 10 European Hubs** and validate their position by number of Startups.



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REPORT BY MOBILE WORLD CAPITAL BARCELONA, 2018

Source: StartupHeatMap, Atomico, Dealroom

Benefits of Having Startups in Spain

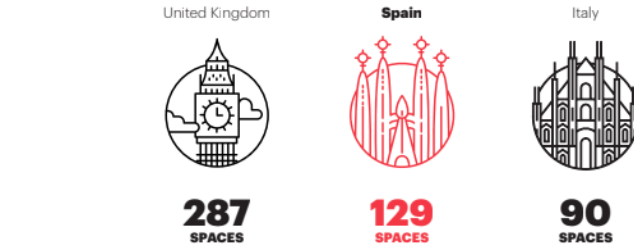


International Incubators & Accelerators



Attracts Talent

Source: ACCIO CATALONIA TRADE & INVESTMENT
Mobile World Capital Barcelona 'Startup Ecosystem Overview 2018'

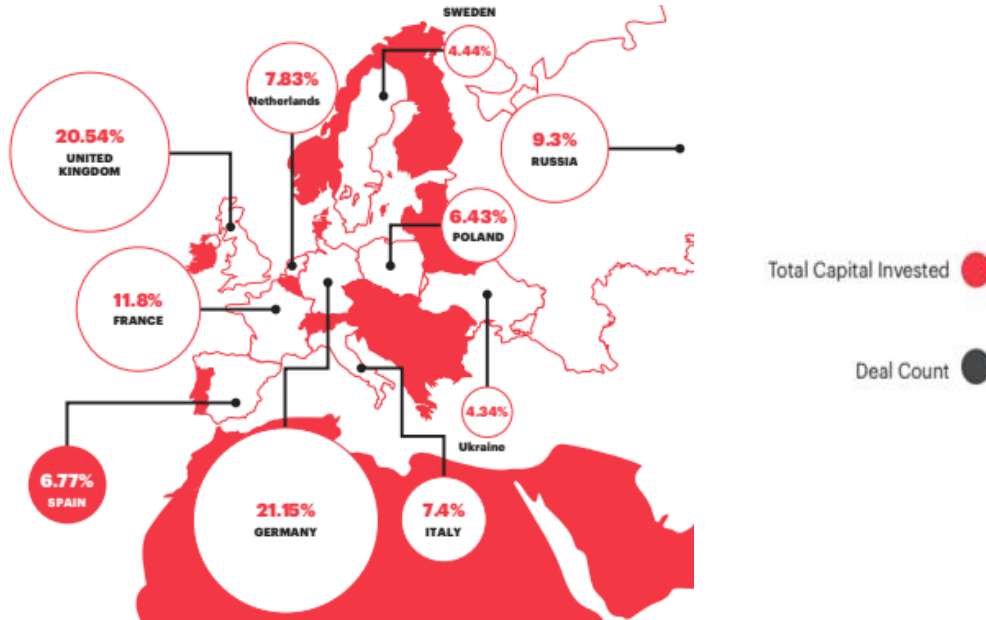


Large amount of coworking spaces



Competitive economy

Benefits of Having Startups in Spain



Professional Developers



Increase in investment

Source: Mobile World Capital Barcelona
'Startup Ecosystem Overview 2018'

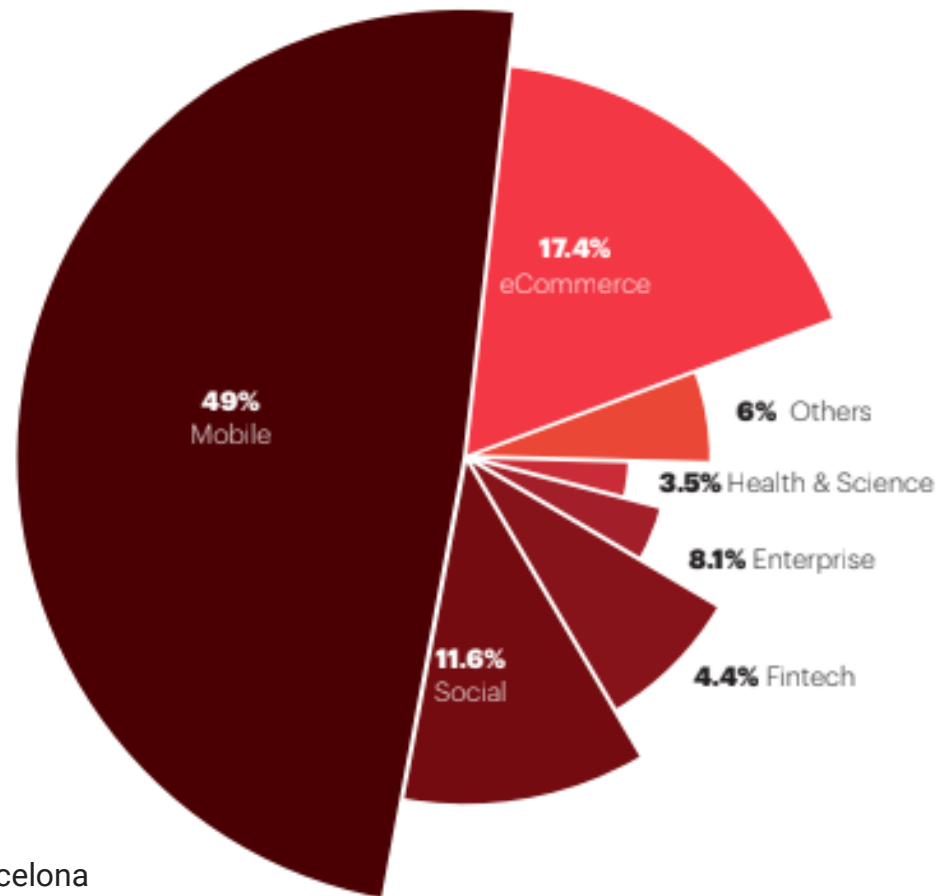
Benefits of Having Startups in Spain

Other...

- Mobile World Congress and other leading technology International Trade Fairs
- A proven success model
- First class business schools
- Quality of life
- Access to business angels and venture capital
- Excellent infrastructures in a strategic location
- And more...

Rising Start-up Sectors in Spain

% Capital Invested by Industries



Source: Mobile World Capital Barcelona
'Startup Ecosystem Overview 2018'

Rising Start-up Sectors in Spain

STRONG GROWTH OF STARTUPS FOCUSED ON **SOCIAL** AND **ENTERPRISE** PLATFORMS

Social replaces e-commerce on first place due to the maturity of the market and the diversification of the activities.

Creation of new startup focused on new sectors with high growth potential.



18.3%
Social



16.1%
Enterprise



14.7%
e-Commerce



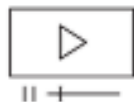
12.8%
Mobile



7.2%
Tourism



7.1%
Health & Science



6.7%
Media



5.9%
Education



5.5%
Fintech



1.7%
Gaming



4.1%
Others

Source: Mobile World Capital Barcelona
'Startup Ecosystem Overview 2018'

How to make Start-up in Spain?

CONTENT



Source : Icx Report

Growing Number of Start-Up Businesses in Spain



Start-up Hubs (BARCELONA)

- Compared to most of the world's ecosystems, Barcelona is more connected
- The startup ecosystem in Catalonia is valued at \$ 6.400M *
- Its main values: global connectivity, reduced talent loss and experience in startups.

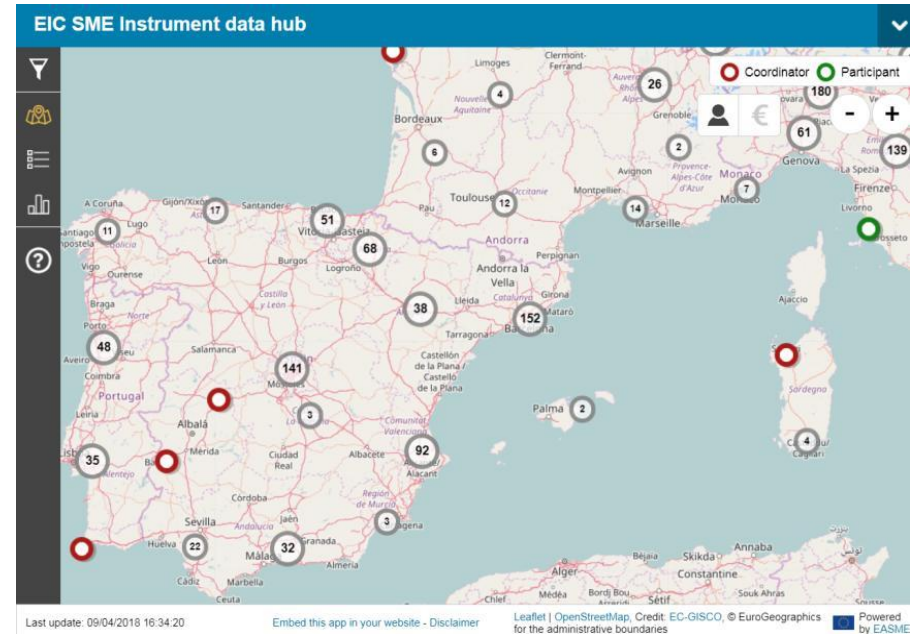


Startups in Barcelona, low loss of talent and high connections with startups from other systems. Good indicators for a future destination in open innovation.

Source: itbusiness.ca October 2017)

Start-up Hubs (BARCELONA)

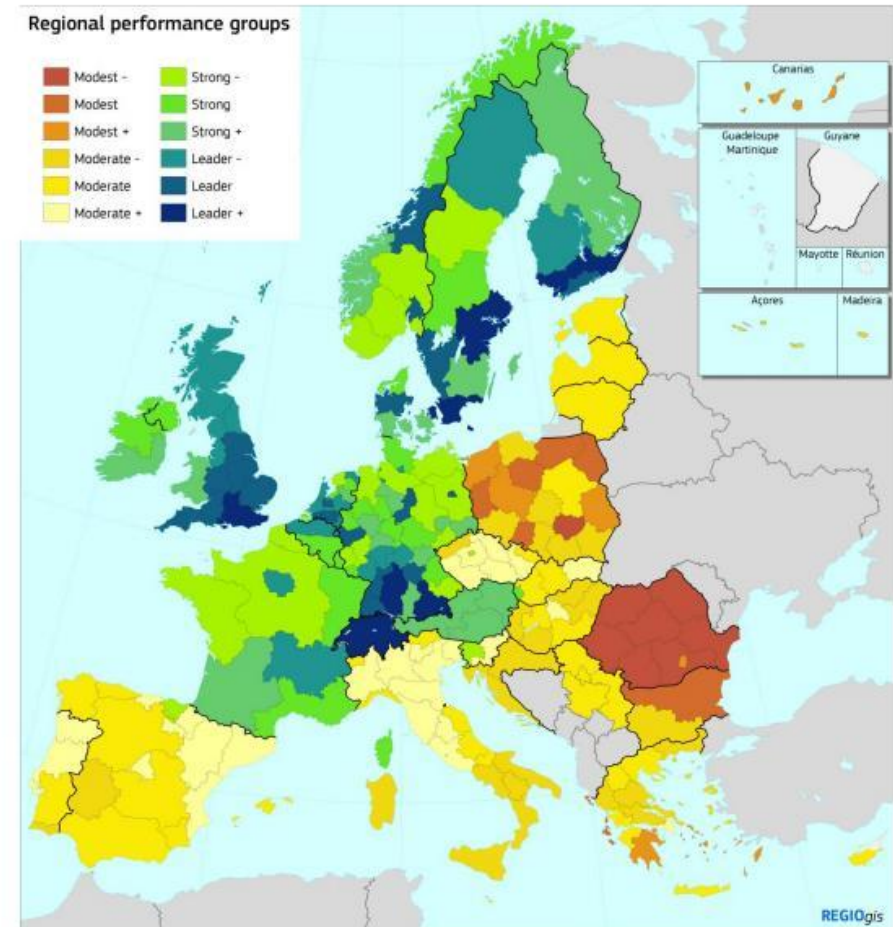
- H2020: € 800 million, 27% for SMEs. Leader in Proof of Concept (7.5% of awarded, with 1.5% of European researchers).
- Financial Times: Catalonia, the best region in Southern Europe for future investments.
- Solid industrial base and powerful ICT sector: key elements that make it an engine of industry 4.0.



Catalonia is one of the main poles for raising funds in the "Instruments for SMEs" of the European Innovation Council (EIC).

Start-up Hubs (BARCELONA)

- Regional Innovation Scoreboard 2017:
- Catalonia appears as a moderate innovator.
- Below the majority of European regions with which it could be compared.
- Despite the fact that scientific excellence is among the European leaders.



Catalunya is a moderate innovator. There is a great opportunity for improvement and the role of the university is key.

Source: itbusiness.ca October 2017)

Start-up Hubs (BARCELONA)

Catalonia, the land of Barcelona, concentrates **more than 1,200 startups** listed in startupshub.catalonia.com
Several items matter to be positioned at the top: density of startups, presence of incubadors/accelerators, Venture builders, VCs, Corporate Disruptive Innovation Hubs, major events organised, as well as funding and talent available.



EU-Startups and MWCcapital, 2017

- **Barcelona is the 5th startup city in Europe**

Ranking of Europe's biggest startup hubs by EU-Startups and Digital Startup Ecosystem Overview by MWCcapital

Startup Heatmap Europe, 2017

- **Barcelona ranks 3rd in preferred European cities by founders**

Ranking of Startup Heatmap Europe

Startup Genome, 2017

- **Barcelona is the 1st hub in Southern Europe in terms of startups**

Global Startup Ecosystem Report

CITIE and NESTA, 2017

- **Barcelona ranks 4th in the top tech cities in the world**

City Initiatives for Technology, Innovation and Entrepreneurship (CITIE) and NESTA

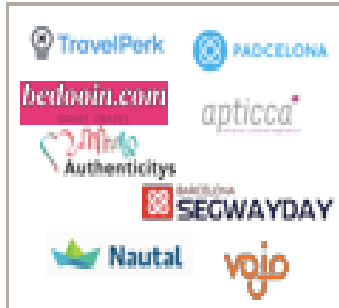
Start-up Hubs (BARCELONA)

Startups classified by sectors (I)

Internet & Other Software



Traveltech & Leisure



Mobile Software



Healthtech



Biotech & Pharma



Adtech & Marketing



Greentech



Internet of Things



Smart Cities



Big Data



Productivity Tech



Gaming



Mediatech & Content



Hardware & Wearables



Cloud Computing




Start-up Hubs (BARCELONA)

Startups classified by sectors (II)

	Mobility	Virtual Reality / Augmented Reality	Fintech & Insurtech	Edtech
Fashion & Design	Sports	Human Tech & Jobs	Wellness & Beauty	Telecom
Logistic Tech	Agritech	Film & Video & Photo	Robotics	3D Printing / Additive Manufacturing

Start-up Hubs (BARCELONA)

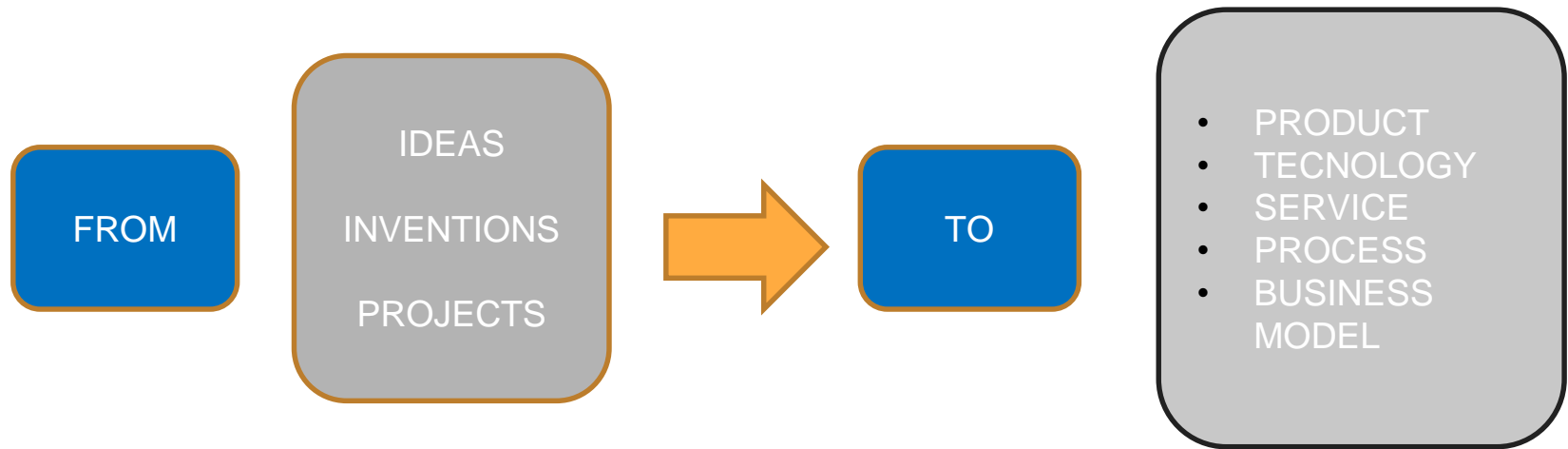
Incubators, Accelerators and Venture Builders

 <p>Internet-related technologies and software sector incubator.</p>	 <p>Seed funding venture programme for technology-based startups</p>
 <p>Startup incubator focused on Big Data projects.</p>	 <p>Accelerator for disruptive projects using blockchain technology</p>
 <p>Startup accelerator for social impact businesses.</p>	 <p>Videogames startups incubator</p>
 <p>Global network of industry focused startup accelerators.</p>	 <p>Venture Builder which builds startups from business ideas validated in other markets</p>
 <p>Accelerator of digital technology-based startups.</p>	 <p>Acceleration Programs in Smart cities, Smart content, Smart agrifood, Smart manufacturing. Powered by Corporates</p>

Others



Transfer Office of Research Results



Satisfies a need,



Create economic value or/and social



Replicable with a cost assumable



The company is a fundamental part Society,

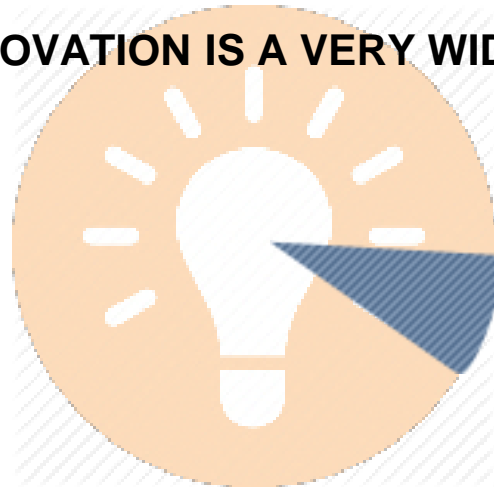


Market and government

Transfer Office of Research Results



INNOVATION IS A VERY WIDE WORLD

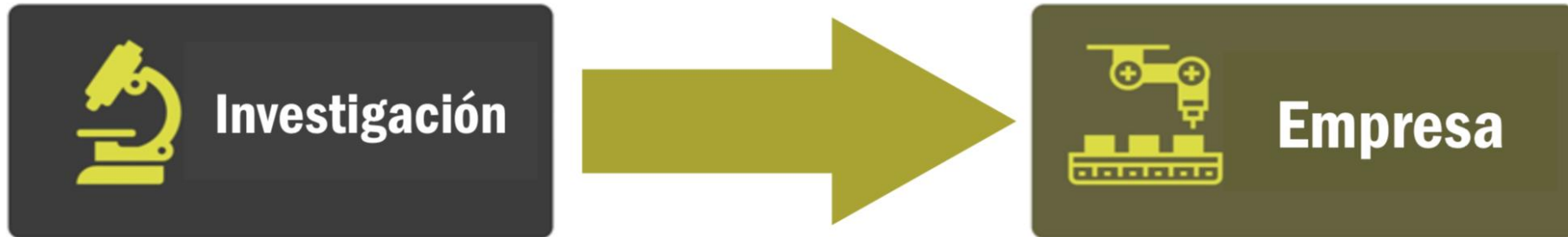


A small part comes from
research (14%)

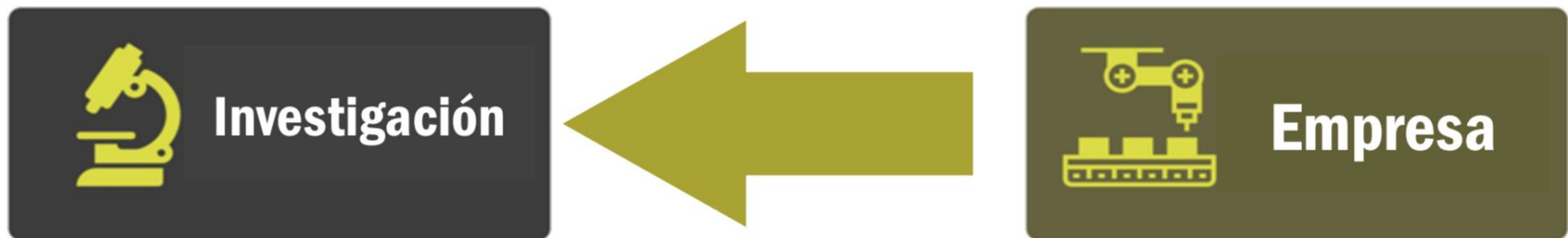


Transfer Office of Research Results

PUSH



PULL



Transfer Office of Research Results



70
Universities

48 public
and
22 private

- The OTRIs are part of the [interface entities](#) or interrelation structures (EDI) within the Science and Technology [System](#) or [Innovation System](#) of a territory.
- EDIs are intermediaries in the [science-technology-enterprise system](#) , and their mission is to dynamize the relationships between the agents of the system.
- The OTRIs, attached to universities and public research centers, have as mission to promote and stimulate cooperation between research groups and the productive sector, as well as the [valorisation](#) and [transfer of technology](#) and research results to the productive environment and to society in its set (third mission of the university).

Tech Transfer offices

Facilitate collaboration between researchers and companies, identifying the most appropriate experts to meet their needs.

Promote the catalog of available research results to be transferred to society.

Support the establishment of contracts and other forms of collaboration between the university or OPI and the company.

Help find public funding sources for collaborative activities between university or OPI groups and other entities.

Manage patents and other forms of R & D protection.

Assist in activities aimed at the creation of companies based on the exploitation of knowledge generated in the university or OPI.

The OTRIs are the agents of the university ecosystem that are called to grow more and to be more relevant in the coming years and its universities lead the creation of spin-offs (**more than 70% of those created by the public research system**).

The European experts and the DG Research of the EC see the future of Europe in the field of open innovation, together with open science. It is necessary to reduce the gap between **the global position in research and in innovation (more than 10 positions of difference**.

Col·laboració de les empreses innovadores 2016. Per tipus d'agent:
(% sobre el total d'empreses innovadores)



Challenges and actions

- Promotion of the role of the OTRIs. Between 2011 and 2016 the public universities of Catalonia created 71 spin-offs.
- Catalan universities receive 23.4% of the resources generated through patent licenses
- - iCERCA has created the Gínjol patent fund (€ 317K): 30 proposals from 18 centers.
- The CERCA add 91M € of services to third parties.

OTRIs PROGRAMS

- Projects for the preparation of the portfolio of products and services susceptible to be valued.
- Technology maturation projects.
- Patentability studies.
- Patent license and / or technology exploitation plan.
- Market studies and activities to know the potential of a technology.
- Business plan, technology marketing plan and activities to validate the business model.
- Support in the preparation of the financial structure and in the search for investors and partners (EBT).
- Other actions: training, dissemination, etc.

Tech Events in Spain (Barcelona)

AUTOMÒBILE BARCELONA
CONNECTED HUB

CIRCULAR ECONOMY
european summit

GSMA Women4Tech

bizbarcelona
Solutions for business owners and entrepreneurs

YO MO BARCELONA
YOUTH MOBILE FESTIVAL
SCIENCE+TECH
MEETS MOBILE
FRA HONTEJAC 27 FEB - 3 MAR 2017

Drones show
INTERNATIONAL DRONES EXPO & CONGRESS

vmworld

gamelab
Barcelona

eDelivery
Barcelona

WebVisions

BIG DATA CONGRESS
BARCELONA

Sonar +D
Startup Garden
+D

ADVANCED FACTORIES
EXPO & CONGRESS

INVESTMENT FORUM XXII Edition in 2017

ACCIÓ

- +580 attendees
- 24 Investors in the panel
- 450 pre-scheduled meetings
- 105 startups applied
- 21 pitches

bdw BIG DATA WEEK
A GLOBAL FESTIVAL OF DATA

SCALE UP BARCELONA

eshow

APPCIRCUS

IN(3D)USTRY
FROM NEEDS TO SOLUTIONS
Additive & Advanced Manufacturing Global Hub

Startup Events in Spain



- **South Summit**

- October 3-5 2018
- Leading Innovation Global Platform which connects top innovators to the world's most powerful investors, and corporations.



- **4 Years From Now (4FN)**

- Barcelona 25-27 February 2019
- Innovation platform for MWC, enabling startups, investors, corporations and public institutions to discover, create and launch new ventures together.

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