



COMPARISON OF THE INNOVATIVE POTENTIAL OF THE LEADING EUROPEAN ECONOMIC ZONES

INNOVATION POTENTIAL OF THE BARCELONA FREE TRADE ZONE

EXECUTIVE SUMMARY

May 2021

THE PURPOSE OF THE STUDY

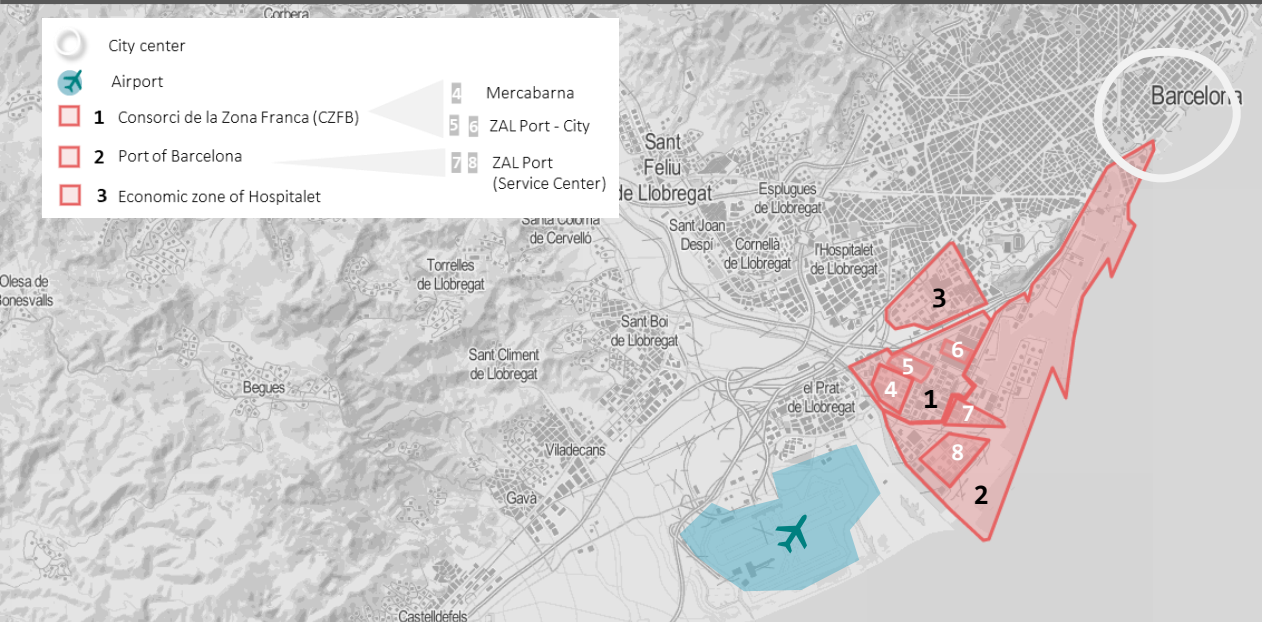
In this document, the Consorci de la Zona Franca in Barcelona **emphasizes its commitment to sustainability, innovation and new technologies** as differential elements that maintain and increase its competitiveness and attractiveness for the economic and business environment.

For this purpose, the **economic zone of Barcelona** is characterized as the sum of the areas that make up the Consorci de la Zona Franca in Barcelona (CZFB), the Port of Barcelona, and the economic zone of Hospitalet, located around the La Pedrosa industrial estate, and a comparative analysis has been carried out with eleven economic zones of reference in Europe.




THE ECONOMIC ZONE OF BARCELONA

Scope of the "economic zone of Barcelona".



11 EUROPEAN ECONOMIC ZONES ANALYZED

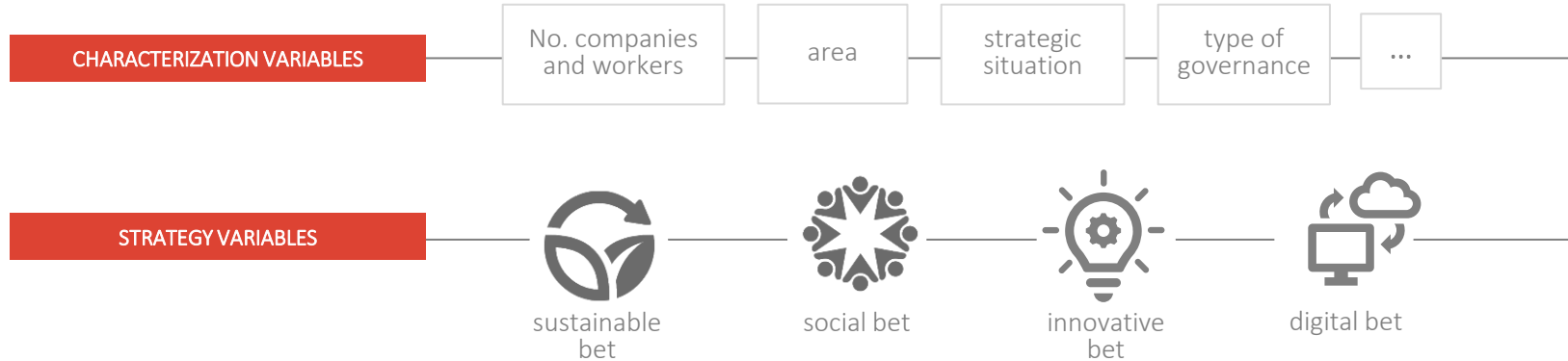
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|----------------|---|-------------------------------|
| Netherlands |  | 1. Rotterdam |
| Belgium |  | 2. Antwerp |
| Germany |  | 3. Hamburg |
| France |  | 4. Marseille |
| France |  | 5. Le Havre |
| Poland |  | 6. Katowice |
| Italy |  | 7. Milan |
| France |  | 8. Lyon |
| United Kingdom |  | 9. East London Tech City |
| Ireland |  | 10. Dublin's Grand Canal Dock |
| Spain |  | 11. Barcelona |



COMPARISON OF ECONOMIC ZONES

ANALYSIS VARIABLES

A comparative analysis has been carried out for the 11 economic zones, focusing on their nature and their different **sustainability policies, innovation and new technologies.**



COMPARISON OF ECONOMIC ZONES

CHARACTERIZATION OF THE ECONOMIC ZONES STUDIED

➤ The economic zones studied have **similar characteristics** in the number of companies, workers, and business or industrial land area.

➤ Different governance models identified :



Technology districts do not usually have a representative body: they are driven by public bodies and managed by private agents, who drive collaborations (PPP) to create synergies with companies in the surrounding area.



Industrial areas are diverse...



Port and free trade zones, in general, tend to have a public mandate, although their representative bodies are usually workers and installed companies.



Industrial estates or industrial zones are privately managed.

	No. of companies	No. direct jobs	Surface (land)	Type of governance		
			ha	publ.	priv.	PPP
EZ ROTTERDAM	-	-	-	●		●
EZ ANTWERP	970	1.625	610			●
EAST LONDON TECH	3.200	48.000	-		●	
DUBLIN DOCKLANDS	500	39.000	129		●	
EZ LYON	6.500	72.500	1.314		●	●
EZ MILAN	-	-	10			●
EZ HAMBURG	290	130.000	10.930			●
EZ MARSEILLE	12.326	124.947	1.579	●		●
EZ LE HAVRE	1.200	70.364	2.480			●
EZ KATOWICE	450	80.000	2.749		●	
EZ BARCELONA	2.675	253.522	8.312	●	●	●

□ real number
 ■ estimation

COMPARISON OF ECONOMIC ZONES

CHARACTERIZATION OF THE ECONOMIC ZONES STUDIED

- The **installed sectors are diverse**, with a predominance of industrial and activities in the service industry.
- **Different specialization models** are identified, depending on the type of economic zone:



Technology and financial centers (Milan, East London Tech City, and Dublin) develop activities related to the service sector.



Industrial zones (Lyon, Katowice, and Le Havre) specialize in secondary sector activities.



- Economic zones with reference ports (Rotterdam, Antwerp, Hamburg, Marseille, and Barcelona) are strongly conditioned by port activity and are often specialized in the trade they receive.

- The logistics sector stands out in all EZs.

INSTALLED SECTORS													
PRIMARY		INDUSTRIAL						SERVICES					
Food products sector	Other/ Not specified	Automotive	Energetic	Maritime	Chemist	Steel industry	Other/ Not specified	Educational	Financial	Logistics	Physician-pharmacist	Media-TIC	
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COMPARISON OF ECONOMIC ZONES

IMPORTANCE OF GEOSTRATEGIC POSITIONING

➤ In terms of location, the most strategic enclaves are those surrounded by or located next to critical infrastructures...



airport



port







railway
terminal



nearest
center

➤ In this regard, the **Antwerp** and **Barcelona** EZs stand out, minimizing the combined **distances*** to the port, airport, railway terminal and city center by 16km and 17km, respectively.

					Joint distance (in km)
EZ ROTTERDAM	38 km	0 km	38 km	15 km	91
EZ ANTWERP	11 km	0 km	3 km	2 km	16
EAST LONDON TECH	12 km	5 km	5 km	0 km	22
DUBLIN DOCKLANDS	14 km	3 km	4 km	0 km	21
EZ LYON	15 km	4 km	6 km	4 km	29
EZ MILAN	8 km	147 km	1 km	0 km	156
EZ HAMBURG	20 km	0 km	3 km	0 km	23
EZ MARSEILLE	25 km	0 km	2 km	0 km	27
EZ LE HAVRE	15 km	0 km	9 km	4 km	28
EZ KATOWICE	50 km	0 km	0 km	0 km	50
EZ BARCELONA	7 km	0 km	6 km	4 km	17

* the joint distance is the sum of the lengths from the EZ to each of the critical infrastructures and the city.

COMPARISON OF ECONOMIC ZONES

IMPORTANCE OF STRATEGIC VARIABLES

Barcelona is, together with Rotterdam, the EZ with the most identified strategic innovation leadership. With 23 and 22 projects, respectively, both territories stand out for the plurality of initiatives promoted in sustainability and digitization. In the third and fourth position, they are followed by Marseille and Antwerp (with 14 and 13 projects each).

- ↗ On average, the economic zones studied have 12 initiatives launched.
- ↗ On the other hand, the cities with the fewest strategic innovation initiatives are Katowice and Milan, with 5 and 4 initiatives.

BARCELONA AND ROTTERDAM LEAD IN NUMBER OF PROJECTS

Economic zone	# init.
1 EZ BARCELONA	23
2 EZ ROTTERDAM	22
3 EZ MARSEILLE	14
4 EZ ANTWERP	12
5 EZ DUBLIN	12
6 EZ LYON	11

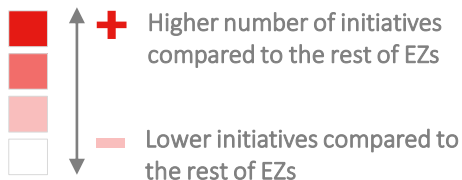
Economic zone	# init.
7 EZ LONDON	9
8 EZ HAMBURG	9
9 EZ LE HAVRE	9
10 EZ KATOWICE	5
11 EZ MILAN	5

COMPARISON OF ECONOMIC ZONES

NUMBER OF STRATEGIC INITIATIVES BY TYPE

*BARCELONA LEADS IN
SOCIAL, INNOVATION AND
SUSTAINABILITY PROJECTS*

Legend:



	SUSTAINABLE BET	SOCIAL BET	INNOVATIVE BET	DIGITAL BET
EZ ROTTERDAM	7	4	6	5
EZ ANTWERP	6	1	4	1
EAST LONDON TECH	-	3	4	2
DUBLIN DOCKLANDS	3	4	3	2
EZ LYON	5	2	3	1
EZ MILAN	2	1	1	1
EZ HAMBURG	2	4	1	2
EZ MARSEILLE	4	2	4	4
EZ LE HAVRE	4	1	1	3
EZ KATOWICE	-	2	1	2
EZ BARCELONA	7	5	8	3

COMPARISON OF ECONOMIC ZONES

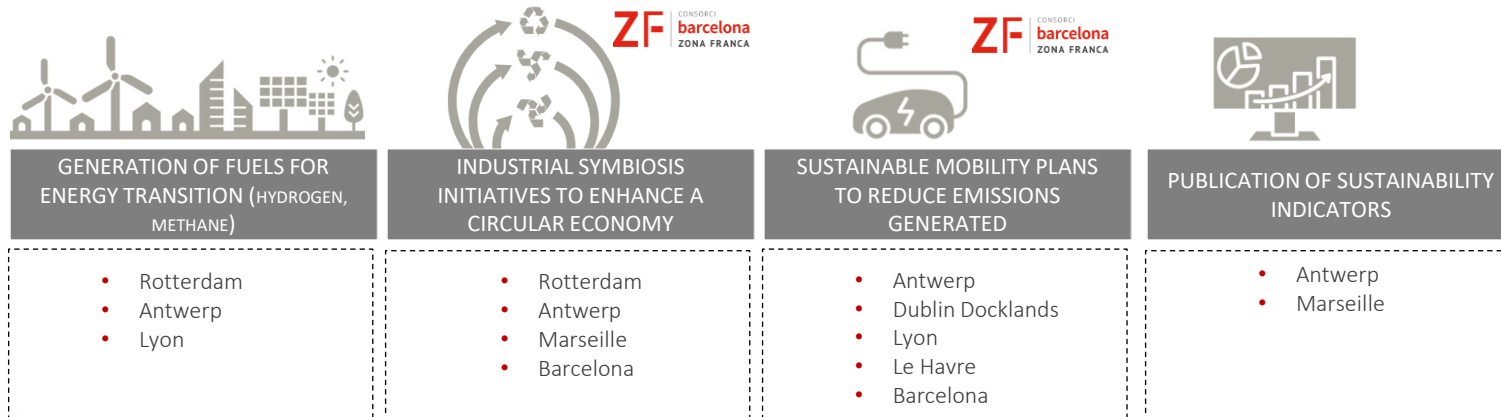
LEADING SUSTAINABILITY INITIATIVES



40 initiatives

The sustainability projects stand out in number, representing 31% of the initiatives of the 11 EZs studied.

➤ Sustainability initiatives are related to decarbonization, CO₂ reduction, and initiatives to promote the circular economy and industrial symbiosis.



Economic Reference Zones

COMPARISON OF ECONOMIC ZONES

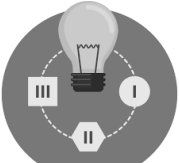


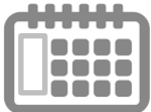
LEADING INNOVATION INITIATIVES



36 initiatives

Innovation is the second strategic axis with the most projects, representing 25% of the initiatives identified.

- Innovation-related initiatives include, among others, the creation of accelerators or incubators for the development of ideas through mentoring and financing and the provision of different infrastructures/materials for companies to promote innovation.

			
ZF CONSORCI barcelona ZONA FRANCA	ZF CONSORCI barcelona ZONA FRANCA	ZF CONSORCI barcelona ZONA FRANCA	ZF CONSORCI barcelona ZONA FRANCA
CREATION OF ACCELERATORS OR INCUBATORS	PROVISION OF INFRASTRUCTURES TO PROMOTE INNOVATION	NETWORKING PLATFORMS OR SECTOR HUBS	CONFERENCES OR EVENTS TO ENCOURAGE INNOVATION
<ul style="list-style-type: none">• Rotterdam• Antwerp• East London• Dublin Docklands• Lyon• Milán• Marseille• Katowice• Barcelona	<ul style="list-style-type: none">• Rotterdam• Antwerp• East London• Dublin Docklands• Lyon• Marseille• Le Havre• Barcelona	<ul style="list-style-type: none">• Rotterdam• Antwerp• East London• Dublin Docklands• Marseille• Hamburg• Barcelona	<ul style="list-style-type: none">• Rotterdam• Antwerp• Lyon• Hamburg• Barcelona

COMPARISON OF ECONOMIC ZONES

LEADING SOCIAL INITIATIVES



29 initiatives

Social projects represent 22% of the initiatives identified.

➤ Initiatives related to social projects range from training programs for workers or managers in the economic zones studied to networking initiatives to foster relationships and collaborations in the economic zone.



ZF CONSORCI
barcelona
ZONA FRANCA

SUPPORT FOR EMPLOYABILITY IN
THE TERRITORY

- Rotterdam
- Barcelona



ZF CONSORCI
barcelona
ZONA FRANCA

PROMOTION OF A RESIDENTIAL /
BUSINESS DISTRICT IN THE
ECONOMIC ZONE

- Rotterdam
- Milan
- Barcelona



TRAINING PROGRAMS FOR THE
QUALIFICATION OF WORKERS

- Rotterdam
- Antwerp
- Lyon
- Barcelona



ZF CONSORCI
barcelona
ZONA FRANCA

GENDER EQUALITY INITIATIVES

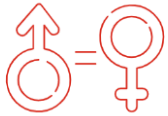
- Rotterdam
- East London
- Dublin Docklands
- Hamburg
- Le Havre
- Barcelona

Economic Reference Zones

COMPARISON OF ECONOMIC ZONES

SOCIAL INITIATIVE: GENDER EQUALITY

In the social initiatives section, the CZFB stands out as the most proactive of the EZs studied to generate gender initiatives. Together with Rotterdam and London, they lead the implementation of equality policies.



TYPE OF INITIATIVES PROMOTED



PUBLICATION OF EQUALITY INDICATORS



AWARENESS CAMPAIGNS



CONFERENCES OR DISCUSSION DAYS



WOMEN'S DAY AT THE EZ



ORGANIZATIONS OR ASSOCIATIONS

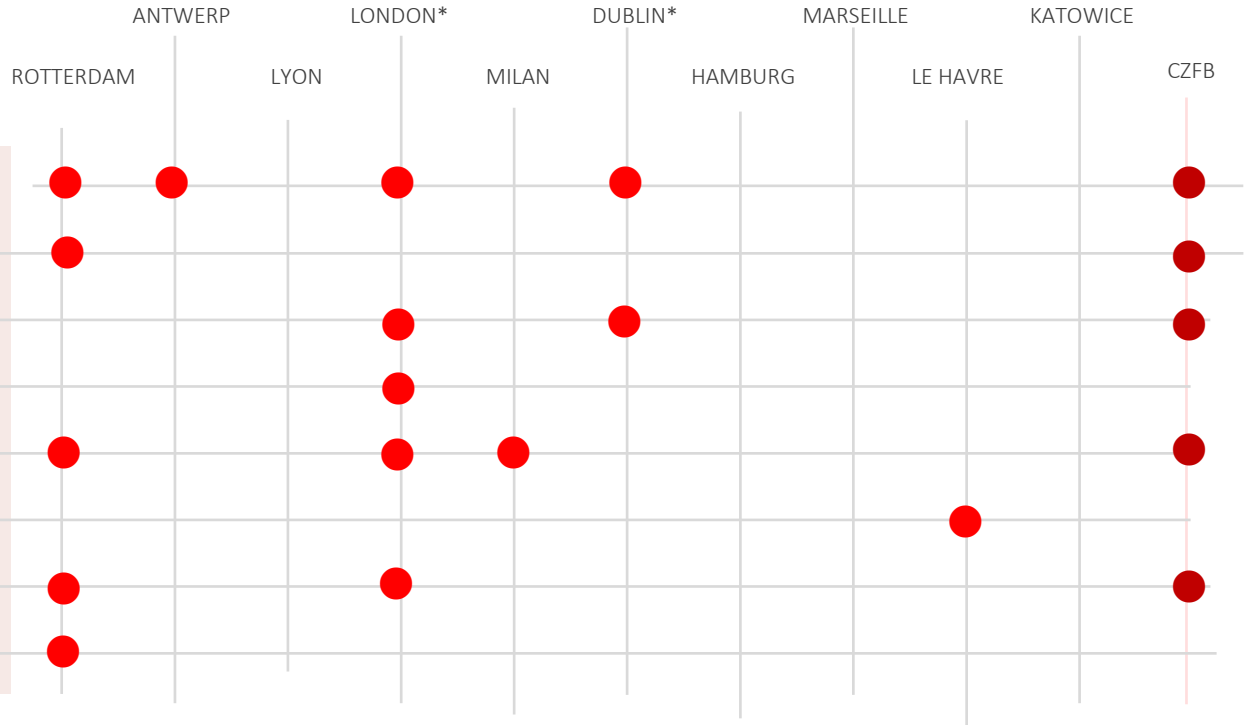


TRAINING ACTIVITIES



POLICIES FOR EQUALITY

• • • OTHER INITIATIVES



COMPARISON OF ECONOMIC ZONES

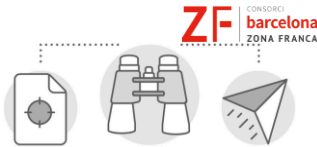
LEADING DIGITAL INITIATIVES



26 initiatives

The digital bet groups 20% of the identified projects.

- The initiatives linked to the digitization of organizations and processes are very diverse in nature. Their primary focus is developing 4.0 technology, promoting information management platforms, and promoting conferences or events to promote digitization.



COLLABORATIONS OR PILOT TESTS TO PROMOTE THE USE OF 4.0 TECHNOLOGY.

- Rotterdam
- Dublin
- Lyon
- Marseille
- Le Havre
- Katowice
- Barcelona



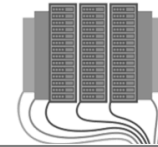
DEVELOPING APPLICATIONS TO DRIVE DATA SHARING AND EFFICIENCY IN THE EZ

- Rotterdam
- Antwerp
- East London
- Marseille
- Le Havre
- Barcelona



COLLABORATIVE INITIATIVES TO PROMOTE CYBERSECURITY

- Le Havre



SUBMARINE CABLING FOR THE INSTALLATION OF TECHNOLOGY SERVERS

- Marseille

Economic Reference Zones

