



GALLERY OF INDICATORS  
BASQUE COUNTRY  
2004-2024

**Saindegia**

Euskal Herriaren garapen sozial eta  
ekonomiko iraunkorrerako behategia  
Observatory for the sustainable social and  
economic development of the Basque Country

**GALLERY OF INDICATORS,  
BASQUE COUNTRY**

**2004-2024**

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GALLERY OF INDICATORS  
**BASQUE COUNTRY**  
2004-2024



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## PROLOGUE



***Iñaki Dorronsoro***  
President

This year we commemorate the twentieth anniversary of the founding of GAINDEGIA, and the global health crisis of 2020-2021 has also forced us to adapt to the new reality. Therefore, in the two years we have spent adapting, and this year, in order to do something special and take advantage of the resurgence of GAINDEGIA, the new Board of Directors has set itself the task of drawing up a statistical report on two decades that have seen significant events in the socio-economic sphere, which I will mention below. This is the report we began several months ago and which you can read in the following pages. In the last part we review the beginnings of this observatory, and we end with a brief report in which the revived GAINDEGIA talks about itself, i.e. what it has done to keep going in the immediate future.

After outlining the context of the following pages, allow me to share a simple reflection regarding our work.

I remember the days when I played an active part in strategy, working in-company, assisting the heads of different regional organisations and giving classes at university. We learned that strategic goals are attained through strategic lines of work that are systematically, dynamically determined by a series of environmental factors.

I remember the value of both internal and external information. And how we tried to develop systems we described as “strategic intelligence” here and there.

Whatever the organisation, strategic goals determine the basic elements of success and their respective indicators. At the same time, strategic lines of work define the crucial steps to be taken and the indicators pertaining to each of these. And finally, the key environmental factors are determined by environmental indicators. In the case of the Basque Country, this context includes other nations and the entire world.

I am convinced that the sum of data is not information, much less knowledge. In other words, information and a set of data do not necessarily constitute knowledge. Because knowledge requires thought and analysis. Therefore, the available data must make up a system that possesses meaning and a heart. And this heart is provided by the strategic goals of a person, business or people.

Data are not neutral, nor are the strategic goals of the Basque Country, products of the asymmetrical interplay of interests and power. The knives in the kitchen drawer are neutral, but when they are taken out they are as useful to prepare a tasty potato omelette as they are to cut someone’s throat.

Strategy and indicators are two sides of the same coin. Without a national strategy, measuring a broad set of indicators runs the risk of obscuring their meaning and priorities, and without indicators it risks drifting



without any meaning at all. Unfortunately, Basque citizens feed three systems of indicators. The lack of a comprehensive system of indicators is a clear sign of a lack of a national strategy. A reality that denies the meaning of a people and leads to dispersion.

32 years ago, in 1992, Robert Kaplan and David Norton proposed the famous Balanced Scorecard, which set out to go beyond companies' financial data. In a very similar way, in 2013 Joseph Stiglitz and Amartya Sen proposed a Human Development index made up of fifty-four indicators, in order to overcome the limitations of GDP. Since then, similar systems of indicators have emerged worldwide. Twenty years ago, GAINDEGIA implemented a system of 29 indicators, and has been publishing its report since then.

Over the last two decades there have been multiple geopolitical, demographic, technological and cultural changes at global and European level that have affected our country and, at the same time, offered opportunities.

The number of people in the world has risen from 5,660 million to 7,240 million, but the growth rate has been slowing down. The number of people living in extreme poverty has fallen, but economic inequality is rising. The world is becoming increasingly urbanised and never before have so many people migrated. At the same time, the global population is ageing and the number of people leaving their countries due to conflicts is breaking records, especially in the case of women and children.

This civilisation that promotes unlimited economic growth has endangered climatic balance, resources and ecosystems worldwide. It cannot be determined just where the disruptive changes caused by digital technology and the speed of the latest wave (artificial intelligence) are leading.

After the attacks of 11th September 2001, in 2007-2008 a major financial crisis broke out. In 2020, the COVID-19 pandemic caused an economic and social crisis, and in 2022 Russia began its invasion of Ukraine. Finally, in 2023 the savage war between Israel and Palestine broke out.

The techno-economic centre has shifted towards east Asia at the expense of the supremacy gained by the United States after the Second World War. Europe, on the other hand, has been pushed out into a semi-peripheral status. The BRICS bloc has consolidated and expanded, challenging Western supremacy.

In this scenario, we have attempted to take a descriptive snapshot of trends in the Basque Country, providing coherent statistical material in order to consider and consolidate strategy.

Without the moral and financial support of public bodies, groups, savings banks, partners and volunteers this would not have been possible. Thanks are due to all of them.



**GALLERY OF  
INDICATORS**

**2004  
2024**





# 1

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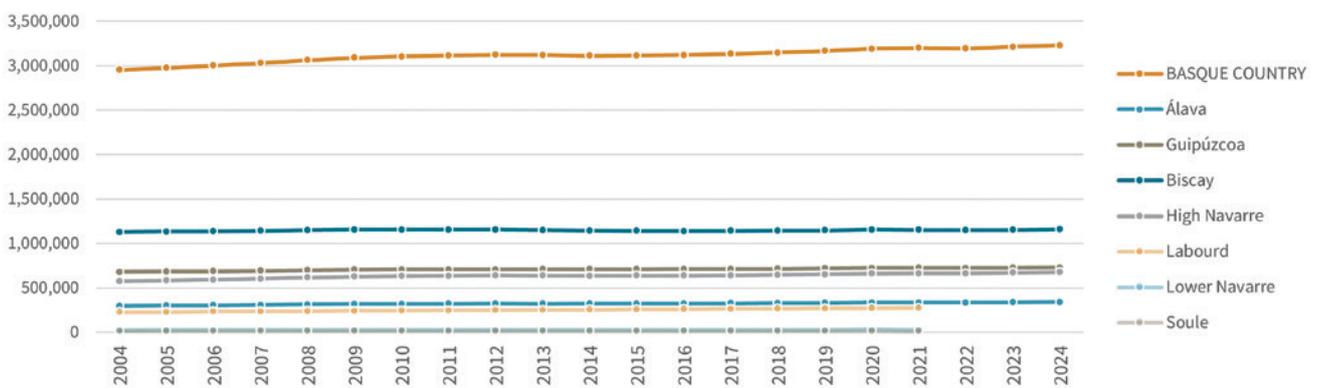
## DEMOGRAPHICS

# 1.1 POPULATION

The population of the Basque Country has increased gradually over the last twenty years. In 2004 it had 2,953,004 inhabitants, and in 2024 it has reached 3,231,287 inhabitants. This growth has occurred in most regions, especially Navarra and Alava; Bizkaia, on the

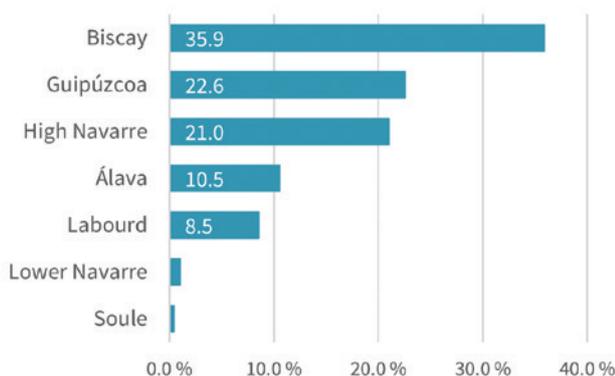
other hand, has seen lower growth. There has also been an increase in Lapurdi (Labour) and Basse Navarre, while in Zuberoa (Soule) the population has continued to fall year after year.

● Evolution of population in the Basque Country and its regions. 2004-2024 (Iparralde 2021)



Among the regions of the Basque Country, Bizkaia accounts for 35.9% of the population, followed by Gipuzkoa (22.6%) and Navarra (21.0%). Zuberoa is the most depopulated region, with 0.5%.

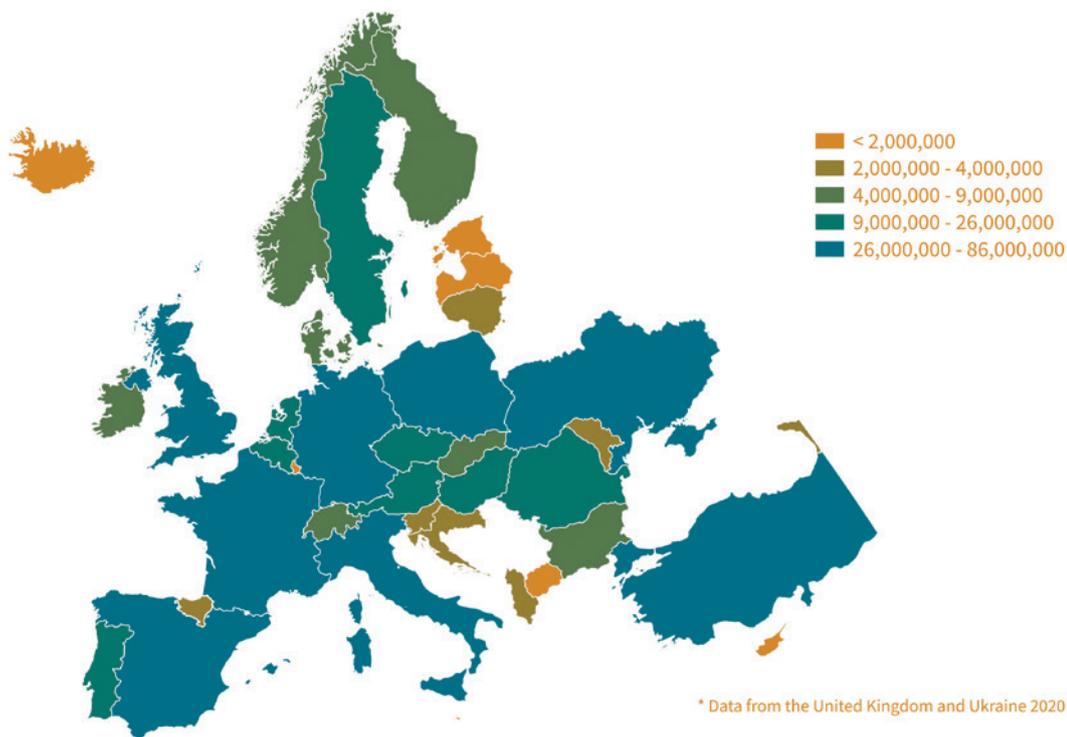
● Population distribution in the Basque Country by regions (%). (Hegoalde 2024; Iparralde 2021)



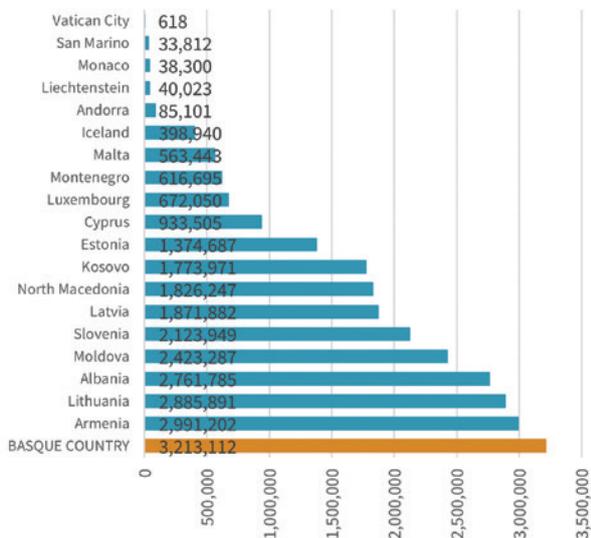
The Basque Country has an average-sized population compared to European states, with 3,213,112 inhabitants. Compared to European states, the Basque Country is in 20th place, ahead of Moldova, Albania, Lithuania and Armenia.

In Europe, Turkey and Germany have the largest populations, followed by France, the United Kingdom, Italy and Spain. With three million inhabitants, the Basque Country is considerably smaller than them.

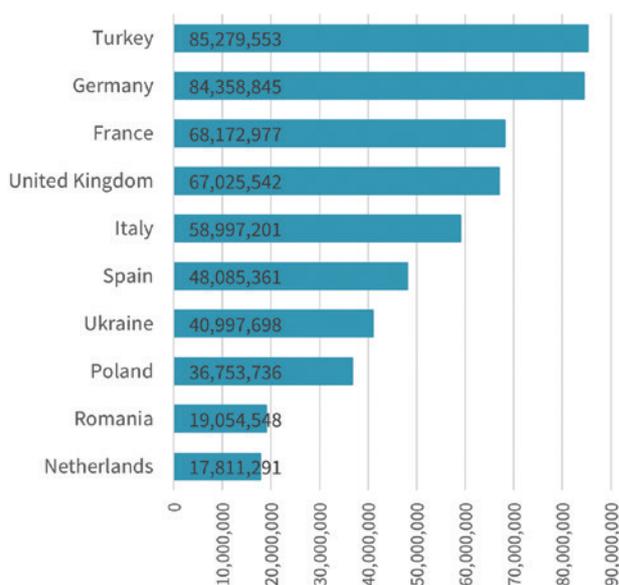
● Number of inhabitants. Basque Country & European states. 2023\*



● The 20 smallest European states (2023\*)

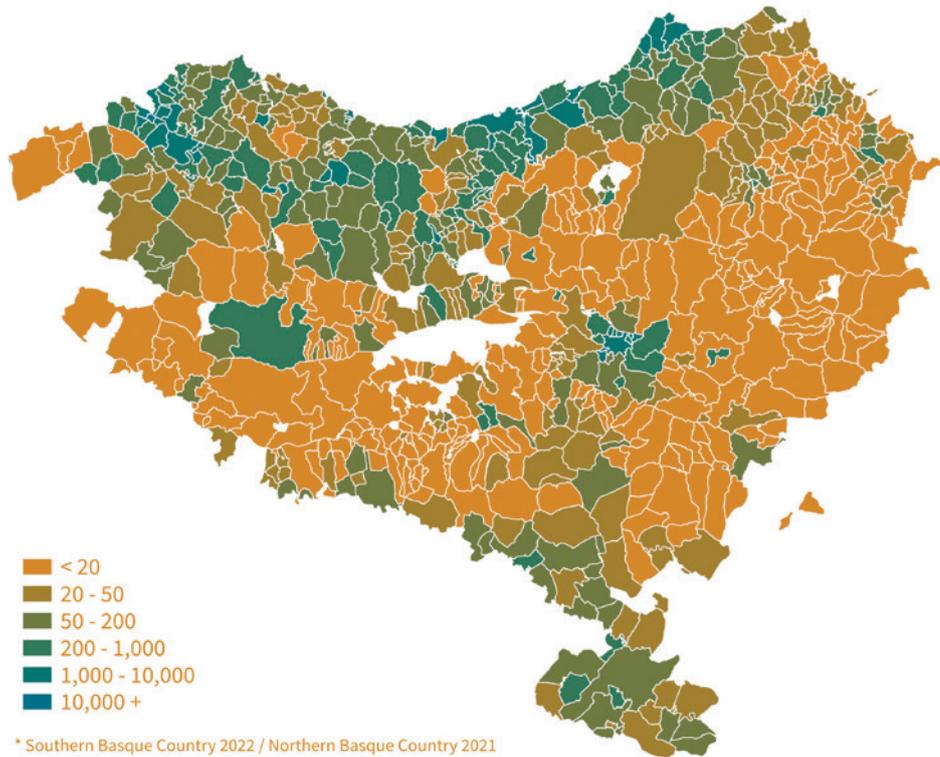


● The 10 largest states in Europe (2023\*)



## 1.2 POPULATION DENSITY

● Population density of Basque Country, by municipality (pop/km<sup>2</sup>)



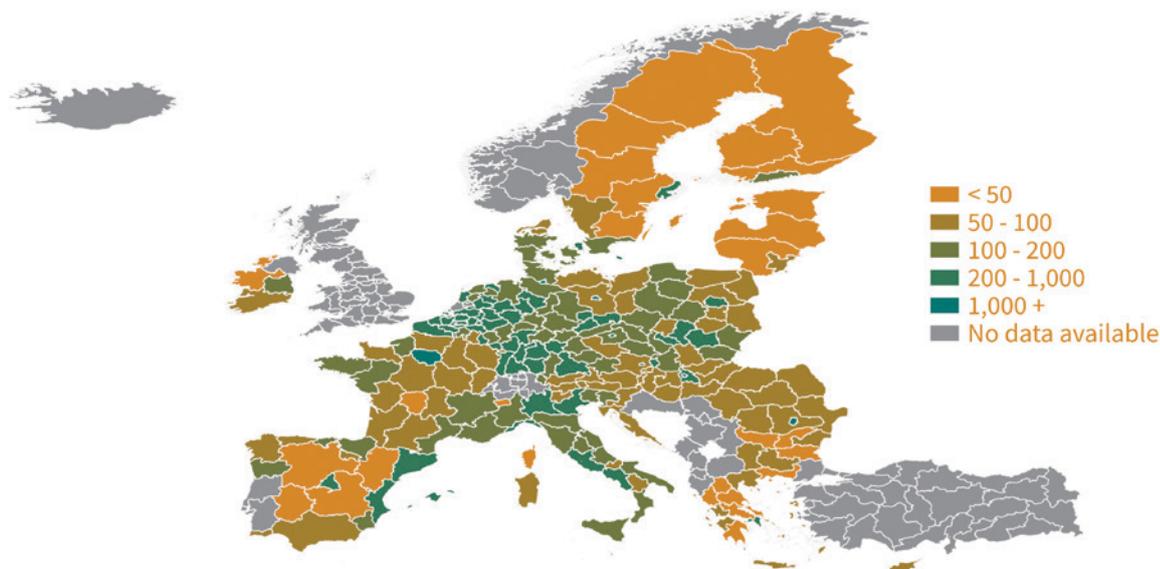
The localities and cities with the largest population are in Bizkaia, Gipuzkoa and Nafarroa (Navarre), where the largest number of residents is clustered in smaller geographical areas. Portugalete (14,075 inhabitants per km<sup>2</sup>) and Barañáin (14,048 inhabitants per km<sup>2</sup>) are the municipalities with the highest population densities in the Basque Country, followed by Burlada, Villava, Bilbao and Pamplona, all with a population density of over 8,000 inhabitants per km<sup>2</sup>. There are also municipalities with high densities around the major urban centres, such as Santurtzi, Basauri and Getxo. In some smaller municipalities, on the other hand, the density is considerably lower, with less than 100 inhabitants per km<sup>2</sup>, because of their more dispersed populations. The ten places with the lowest density are: Gallipienzo, Ujué, Larrau, Güesa, Roncesvalles, Navascués, Petilla de Aragón, Ezprogui, Urraúl Alto and Castillo-Nuevo.



Compared to other European regions, the Basque Country in general has an average density, but points with higher densities can be observed in its urban areas, comparable to other major European conurbations, such as Berlin, Brussels and some districts of the Île de France. On the other hand, rural areas of the Basque

Country are more similar to other more dispersed mountain and country regions of Europe. Thus, the Basque Country shows contrasts in terms of population density and distribution: a high concentration in the metropolitan areas and a greater dispersion in rural areas.

● Population density. Basque Country & European regions 2023 (pop/km<sup>2</sup>)



\* Data from Ukraine 2020



# 1.3 AGE STRUCTURE OF THE POPULATION

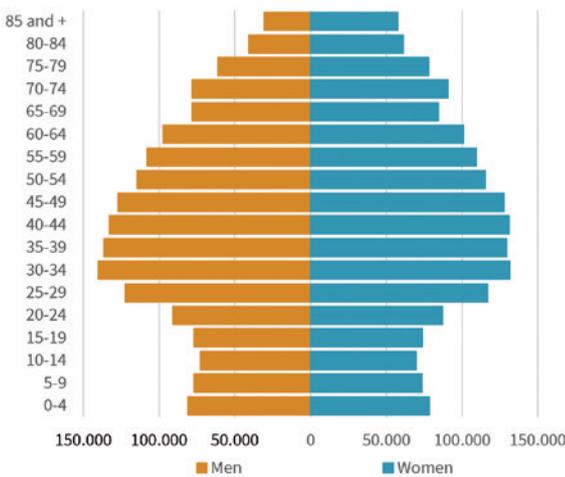
In 2007 the population in the age bracket between 0 and 4 years old and that between 5 and 9 years old was high, showing a high birth rate. The working-age population, specifically the bracket from 30 to 44 years old, was the most numerous. The number of people over 65 years old was fairly modest. Higher survival of women to more advanced ages was observed.

In 2012, and increase in the population from 0 to 9 years old was observed, indicating a slight increase in the birth rate compared to previous years. Among the working-age population, the group from 40 to 49 years old predominated, showing overall ageing. The population over 65 years old had grown, largely due to the increase in the number of women over 70 years old.

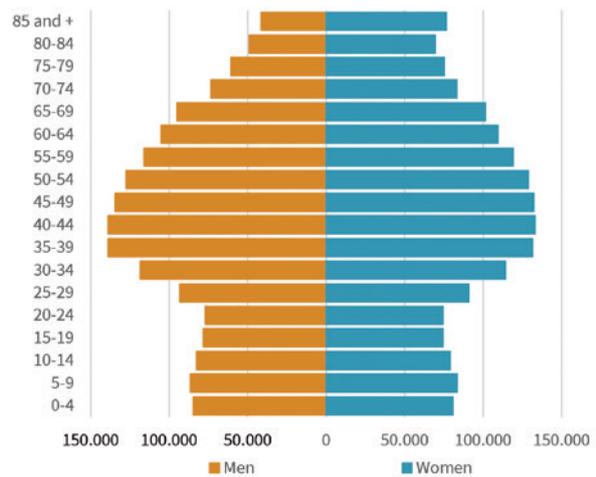
In 2017, the group from 0 to 4 years old fell again, showing a falling trend in birth rates. The generation from 40 to 54 years old remained the most numerous. The ageing trend continued to be consolidated, with the number of individuals over 75 years old growing, showing a gradual increase in the proportion of people of advanced age, with more women surviving.

Age-sex/gender pyramid of Basque Country. 2007-2022

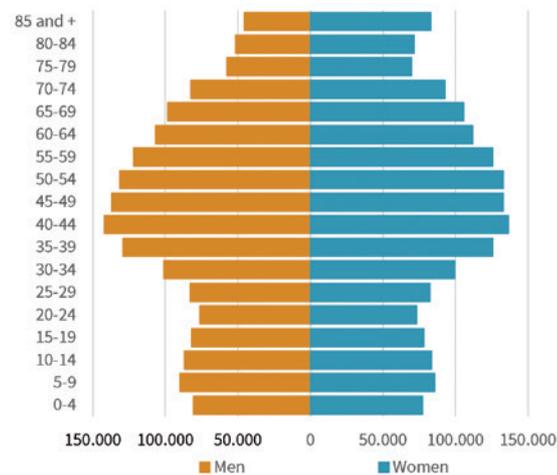
Basque Country, 2007



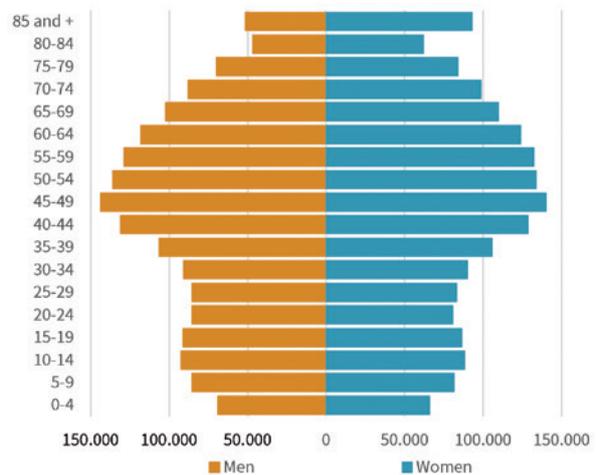
Basque Country, 2012



Basque Country, 2017



Basque Country, 2022



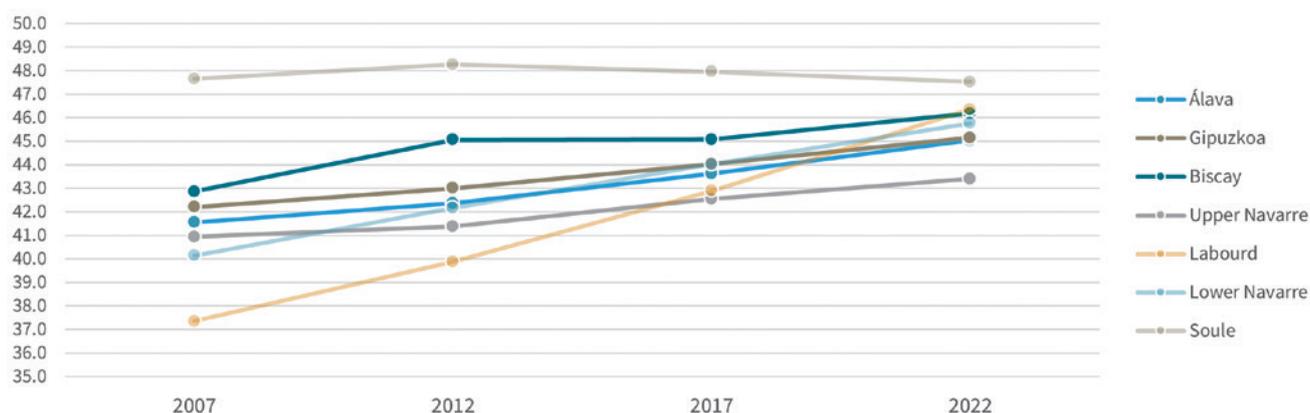
In 2022 the age bracket from 0 to 4 years old decreased even further. The population of working age began to fall, in particular that from 30 to 44 years old. The groups over 65 years old continued to grow and the number of women over 85 years old was high, pointing to an ageing process among the population of the Basque Country.

Therefore, the age pyramids in the Basque Country clearly show the birth rate falling and the population ageing. From 2007 to 2022 the number of children fell and the working-age population peaked in 2012, before declining. The ageing process is highly significant.

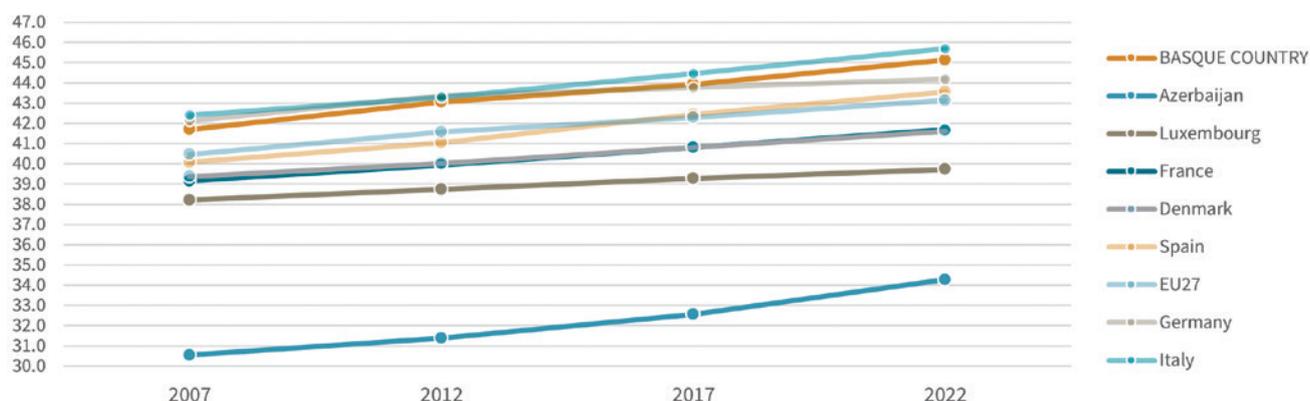
In all areas of the Basque Country, the average age has risen, showing notable ageing. Zuberoa has the highest average age, at 47.5 years old in 2022, and that in Lapurdi has risen significantly: while in 2007 it was by far the youngest region, by 2022 it was the second-oldest, after Zuberoa (from 37.4 to 46.4). Navarra and Alava have the lowest average age, at 43.4 and 45.0 years old respectively.

Compared to other countries in Europe, in terms of average age Spain, Germany and Italy, with a significant increase in age, cover the whole range, and the Basque Country has a similar average to them. Azerbaijan has the lowest average age in Europe, 34.3 years old in 2022, though it is also ageing.

Average age by regions, 2007-2022

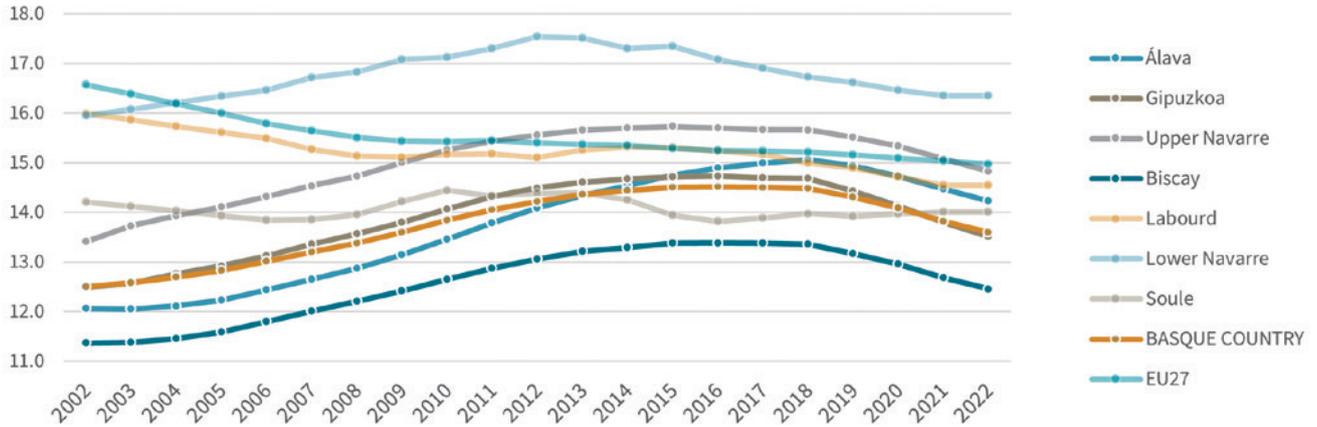


Average age, Basque Country & selected European states, 2007-2022



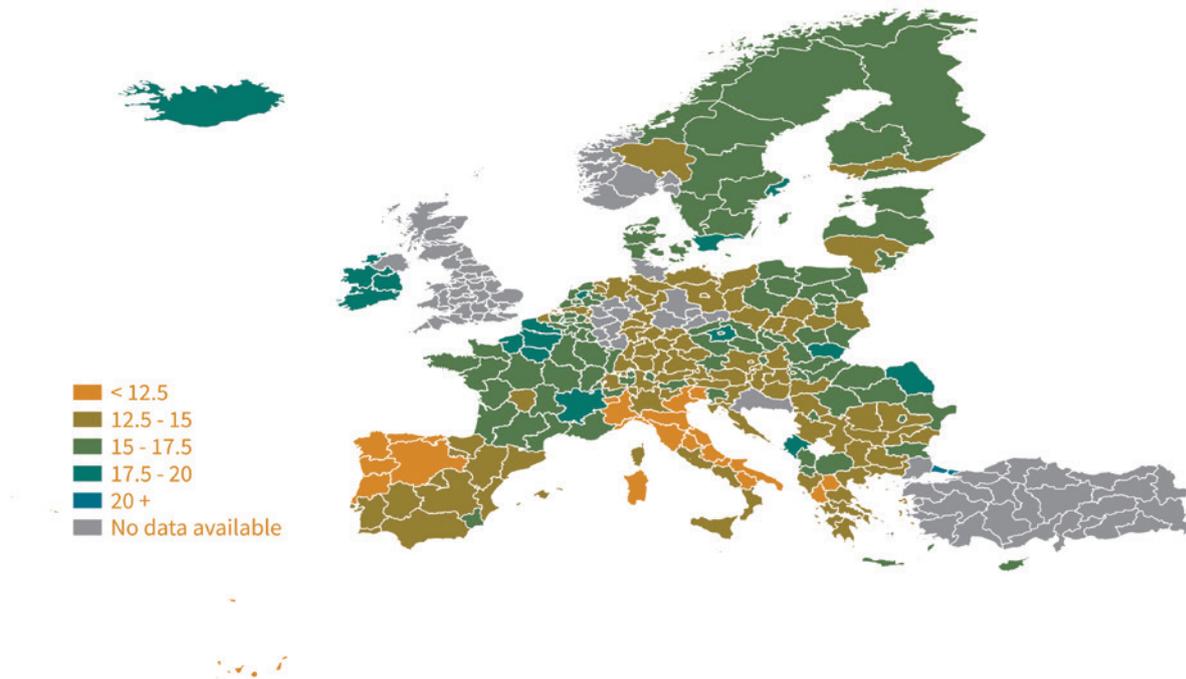
While the youngest group, from 0 to 14 years old, has grown following the increase observed in the first decade of the century, there has been an overall decrease in the Basque Country. In 2022, Bizkaia had the lowest proportion of individuals from 0 to 14 years old, at 12.5%, while Basse Navarre had the highest, at 16.4%.

● Proportion (%) of population under 14 years old, 2002-2022



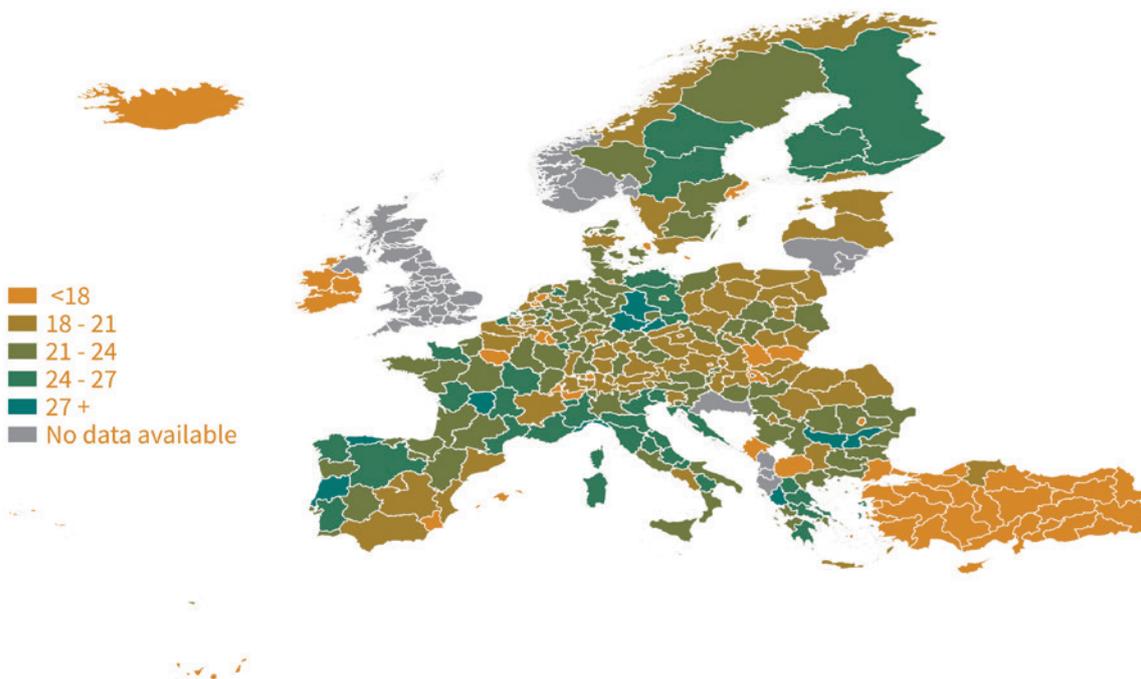
In the EU27 the proportion of children has fallen over twenty years. However, at 13.6%, the Basque Country is currently below the European average.

● % of population under 14 years old. Basque Country & European regions 2023

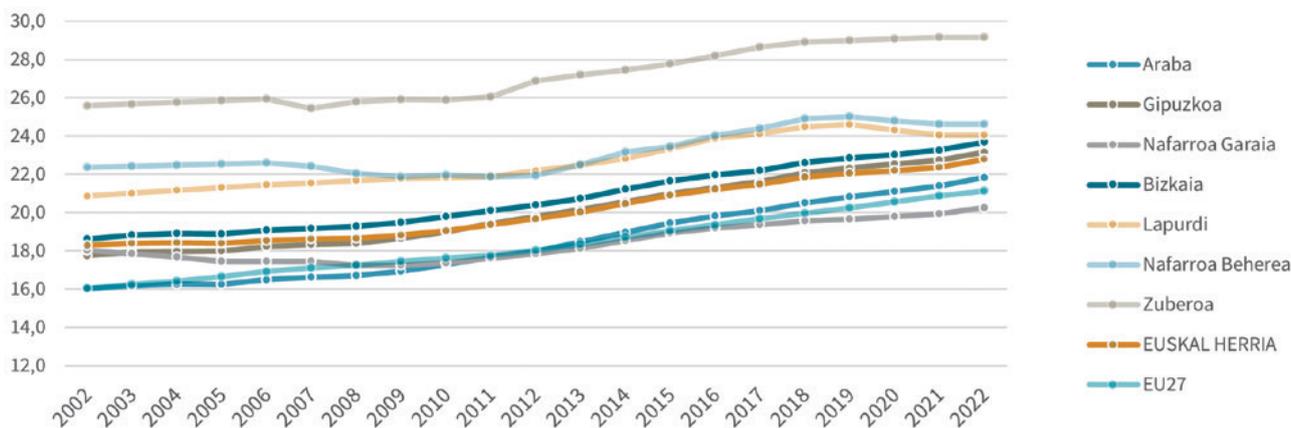


There has been a significant increase in the population 65 years old and above. the percentage of people of advanced age has risen in all regions, reaching 22.8% in 2022 in the Basque Country as a whole. Zuberoa is the region with the highest proportion (29.2%).

● % of population over 65 years old. Basque Country & European regions 2023



● Proportion (%) of population over 65 years old, 2002-2022

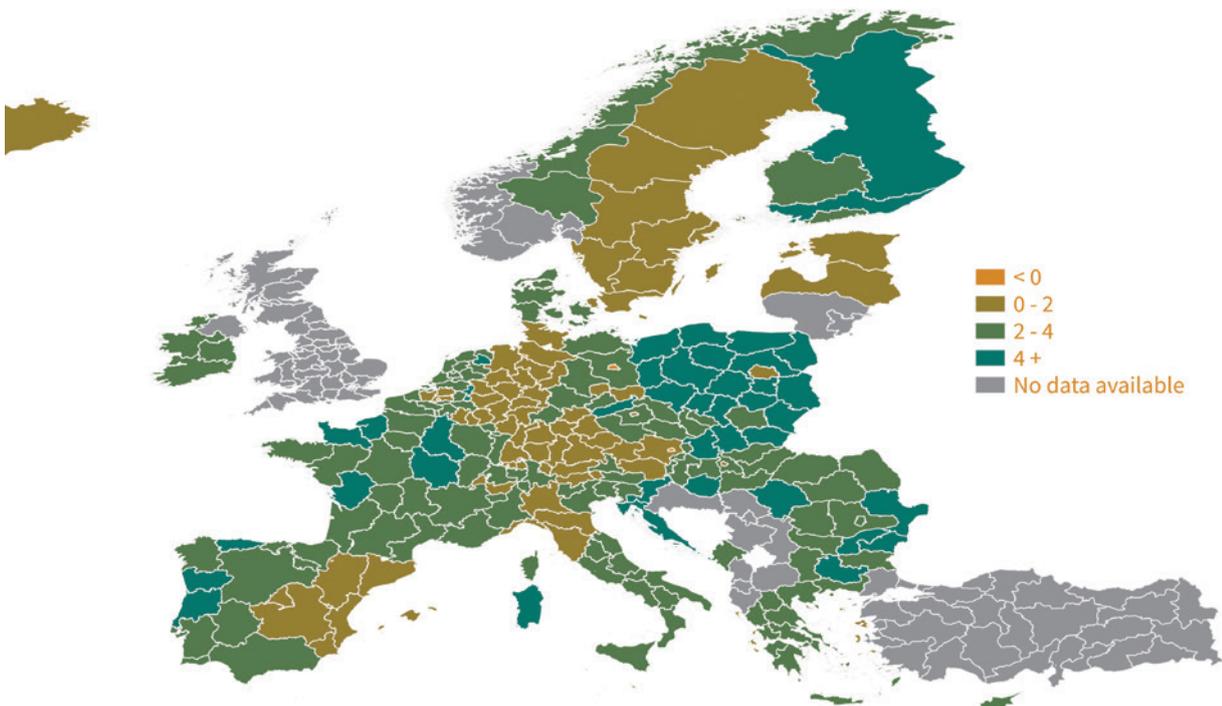


This trend, of the youngest groups remaining steady or decreasing and the oldest groups increasing, is the same across the EU27. Thus, in most European regions, the proportion from 0 to 14 years old has risen slightly or fallen by up to 3 points, depending on the region. Those over 65 years old, however, have risen between one and five points.

● % variation in population under 14 years old. Basque Country & European regions 2014-2023



● % variation in population over 65 years old. Basque Country & European regions 2014-2023

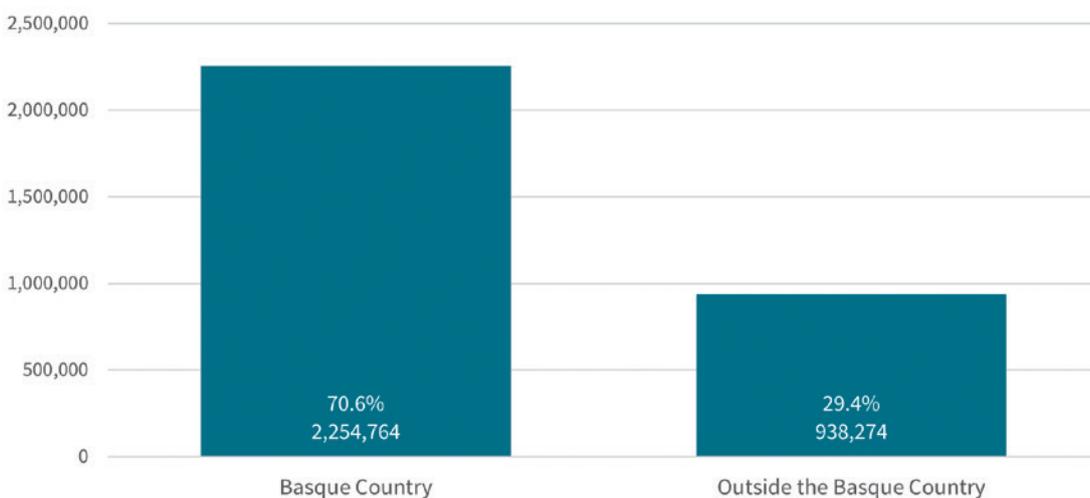


# 1.4 MIGRATIONS

According to 2022 figures, the total number of people born in the Basque Country was 2,254,764, making up 70.6% of the population. Many Basque residents were born outside the Basque Country - approximately 938,274 people - making up 29.1% of the population.

Analysis of the group of people born outside the Basque Country shows that most were born in Spain (437,106) and France (126,387). Many Basque residents were also born in other countries, such as Morocco (50,011), Colombia (40,292), Ecuador (24,069) and Romania (21,821).

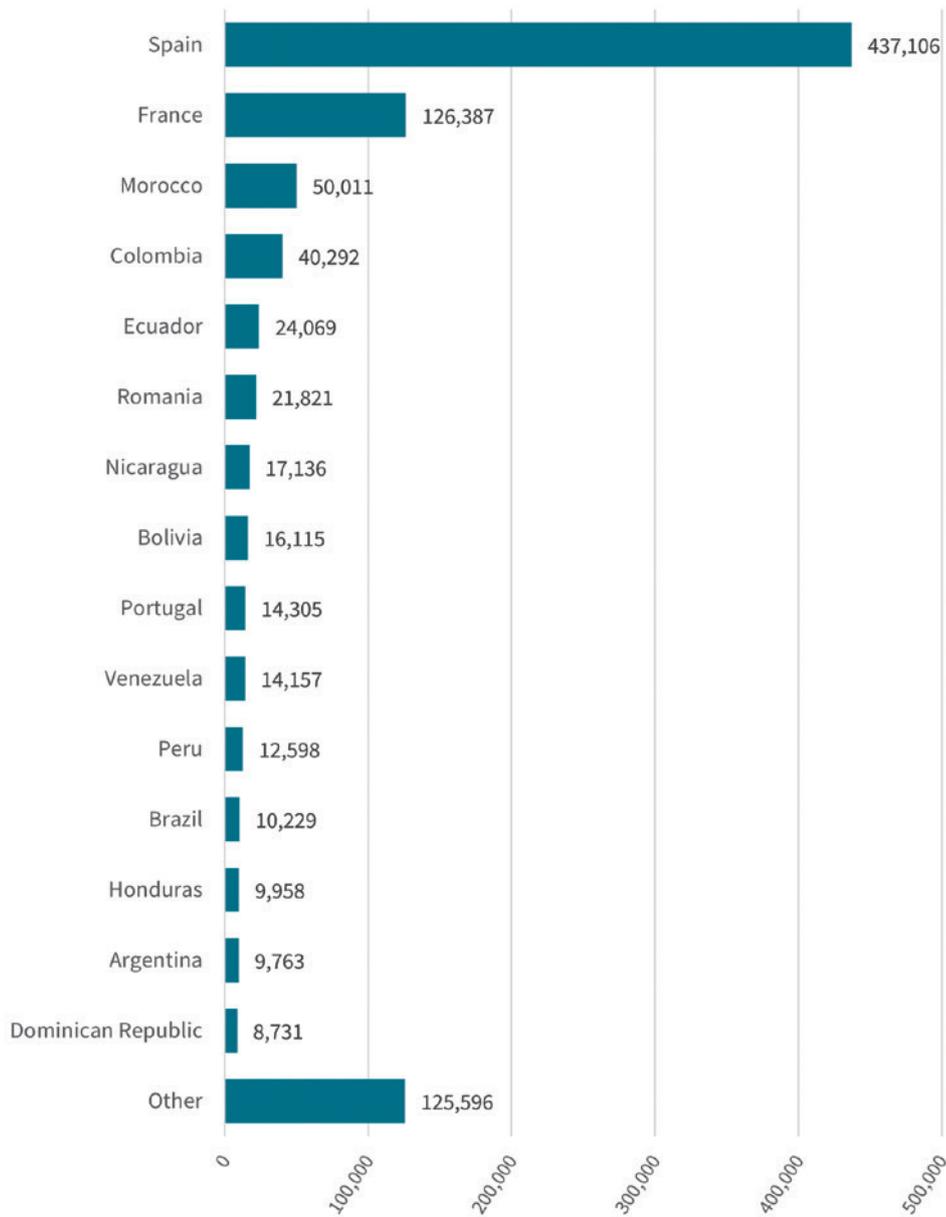
● Population of Basque Country by place of birth. 2022



While the number of births in the Basque Country has fallen, the population has increased over the last twenty years.



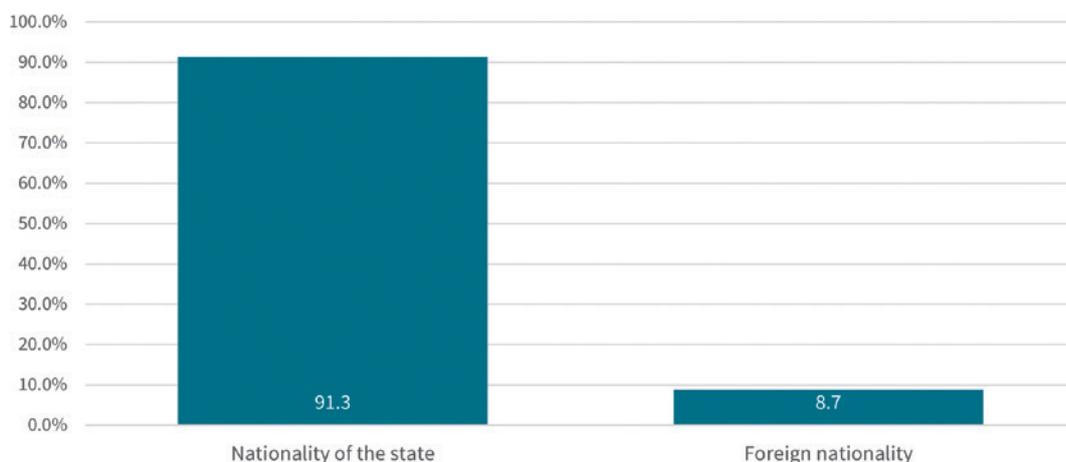
● Population of the Basque Country born outside the Basque Country. 2022



In terms of nationality, however, there are only 8.7% of Basque residents who do not have Spanish or French nationality.

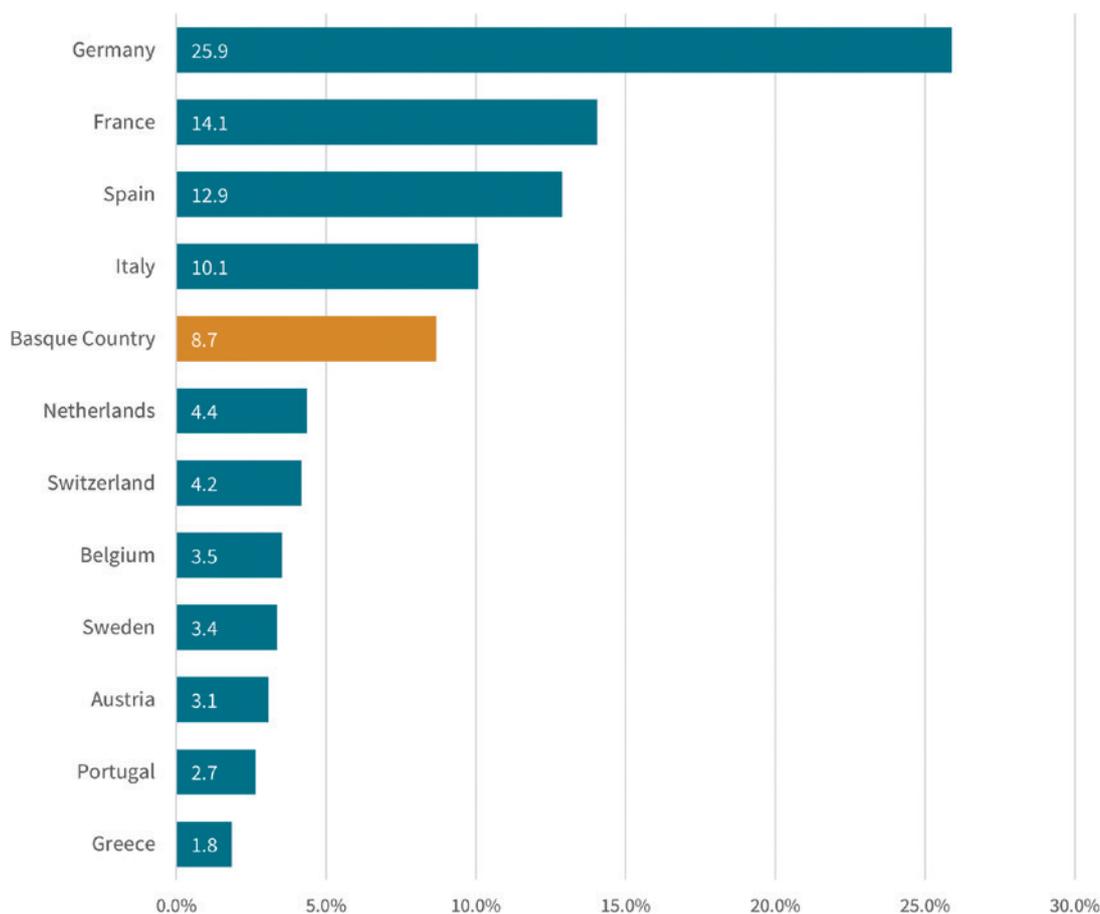
Foreigners without French or Spanish nationality make up 8.7% of the population of the Basque Country.

● Population of Basque Country by recognised nationality. 2022



Compared to European figures, the Basque Country is in the middle, quite far behind Germany. 26% of German residents are currently considered to be foreigners. This is followed by France with 14.1%, Spain with 12.9% and Italy with 10.1%. The Basque Country is behind them, in fifth place.

● Population considered foreign (%) in Basque Country & states. 2022



# 1.5. BIRTHS

Analysis of the trend in the birth rate in the Basque Country between the years 2000 and 2022 shows a fall over this period. In 2000 the rate stood at 8.7 per thousand inhabitants, but by 2022 it had fallen to 6.6.

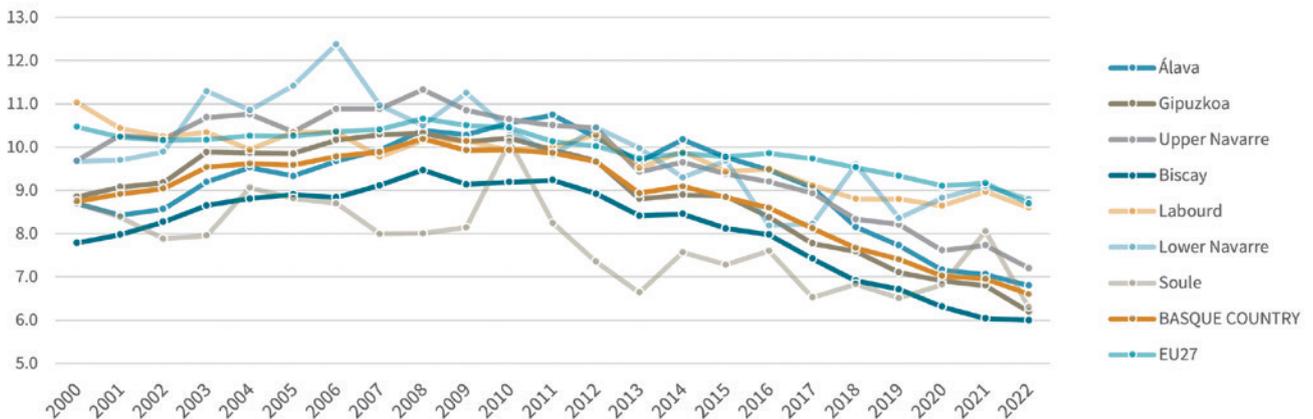
By regions, Navarra had the highest rate in most of recent years, while Bizkaia and Zuberoa had the lowest. In any case, the trend is similar in all of them.

According to 2022 figures, both the Basque Country (6.6) and other areas around it are below the European average (EU27, 8.7), while certain nearby regions (such as Brussels-Capital at 12.1 or Île de France at 13.2) have significantly higher rates.

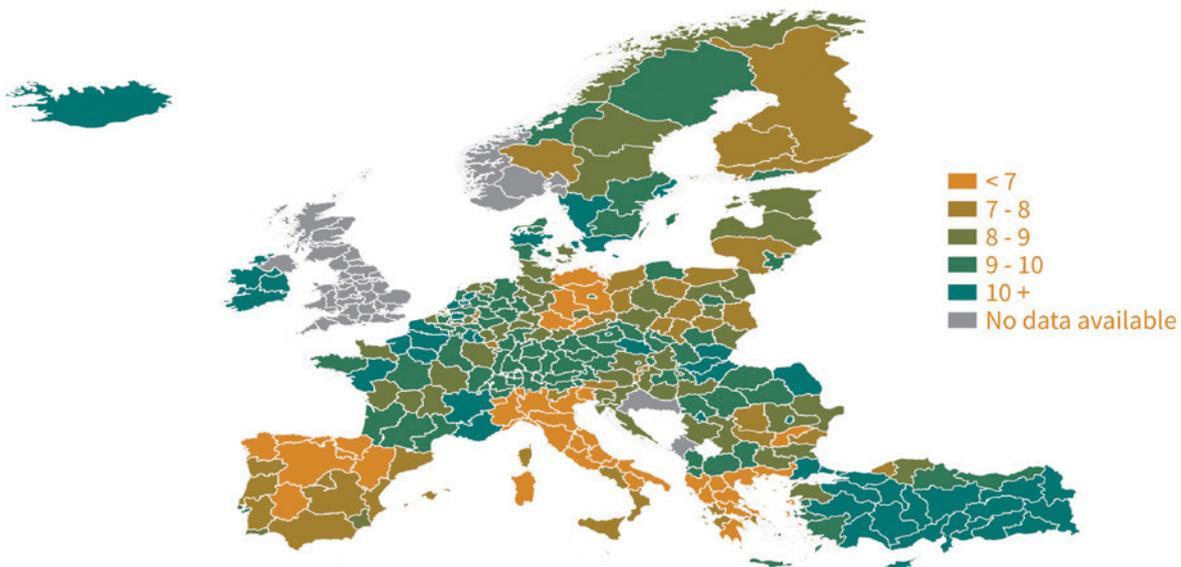
Most Spanish regions have low birth rates (for example Galicia 5.4 and Asturias 4.7).

Other European regions have quite high birth rates; as in the case of Mayotte (36.0), Guyana (26.6) and the Şanlıurfa and Diyarbakır region in north-west Turkey (24.0).

Births per thousand inhabitants. Basque Country, regions & EU27. 2000-2022



Births per 1,000 inhabitants. Basque Country & European regions. 2022

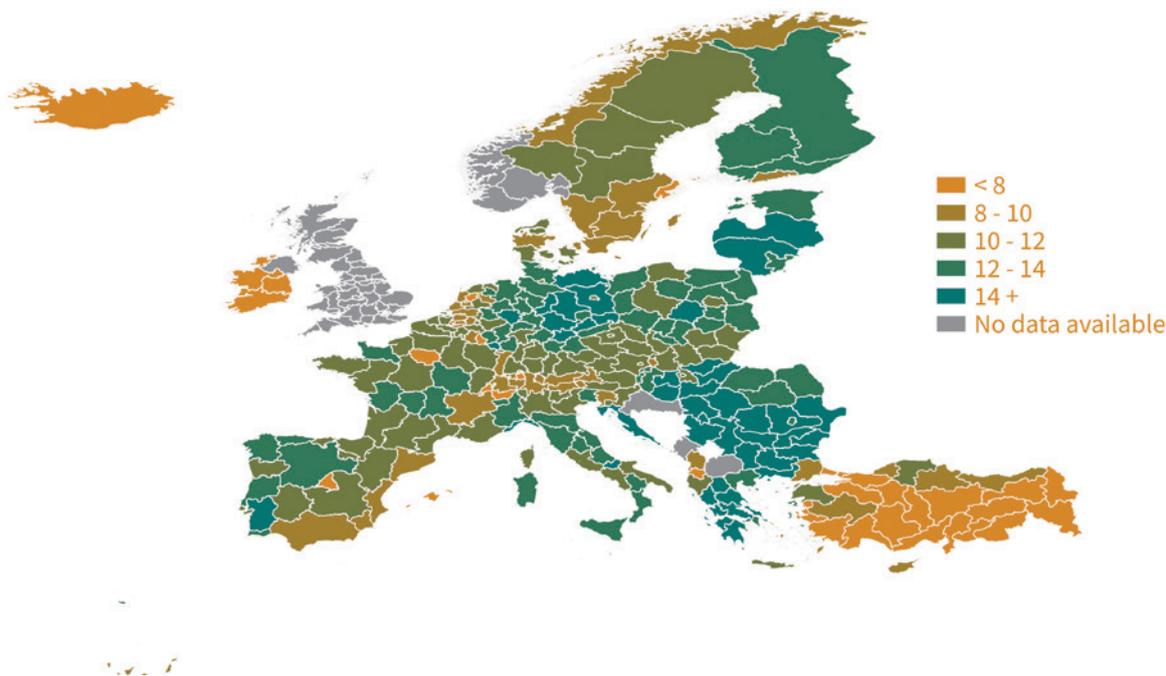


# 1.6 DEATHS

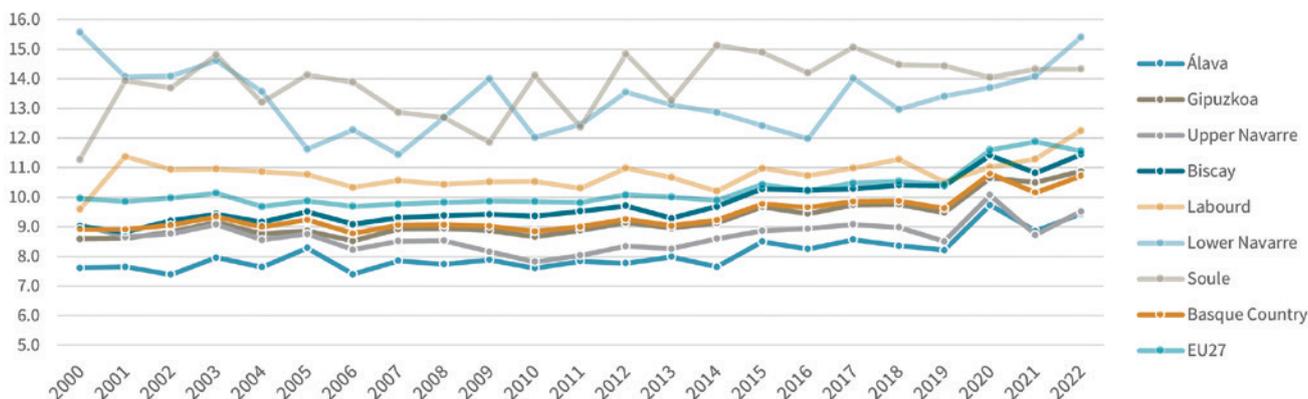
The figures for recent years show a rising trend in the mortality rate in the Basque Country, and while the COVID-19 pandemic caused an even more notable increase in 2020, in general terms this trend persisted in 2022. The average in the Basque Country was 10.7 per thousand inhabitants in 2022, and by regions,

the highest rates were observed in Iparralde (15.4 ‰ in Basse Navarre, 14.3 ‰ in Zuberoa and 12.2 ‰ in Lapurdi) because of demographic ageing. An increased mortality rate has also been observed in the EU27, rising from 10.0 in 2000 to 11.6 in 2022, and this may be attributed largely to the ageing population and to the increase caused by COVID-19. However, there are significantly higher mortality rates in some European regions, such as those of Severozapaden in Bulgaria (22.6) and Saxony-Anhalt in Germany (17.2), where demographically the population is older.

● Deaths per 1,000 inhabitants. Basque Country & European regions. 2022



● Deaths per thousand inhabitants. Basque Country, regions & EU27. 2000-2022



In general terms, the population of the Basque Country has grown in the last twenty years, mainly in Hego Euskal Herria, the regions that form part of Spain. Bizkaia is the territory with the most inhabitants, followed by Gipuzkoa and Navarra. In European terms, the Basque Country is situated among the small and medium-sized states, far from the bigger ones.

Overall, the Basque Country is of average density in comparison with other European regions. However, in its urban areas there are pockets of high density comparable to other major European cities like Berlin, Brussels or some districts of the Île de France. On the other hand, the rural regions of the Basque Country are more similar to other more sparsely-populated rural and mountain areas in Europe. The Basque Country therefore displays contrasts in terms of population density and distribution: a large number of inhabitants in metropolitan areas and greater dispersion in rural areas.

The age pyramids of the Basque Country clearly show that the birth rate is falling, while at the same time the population is ageing. From 2007 to 2022, the number of children fell and the population of working age peaked in 2012, then entering a downward trend. The ageing process is very significant, mainly because the long life expectancy of women is causing a higher density in the oldest groups. The age pyramid in the Basque Country is gradually widening at the top, for the oldest groups.

This trend, of the youngest groups remaining steady or decreasing and the oldest groups increasing, is the same across the EU27. Thus, in most European regions, the proportion of people from 0 to 14 years old has risen only slightly or fallen by up to 3 points, depending on the region. Among those over 65 years old, however, it has risen between one and five points.

Birth figures in recent years show a widespread decline in the Basque Country and in other European regions, though the difference is more obvious in some areas. In the year 2000, the Basque Country had a birth rate of 8.7 per thousand inhabitants, but by 2022 it had fallen to 6.6. The birth rate is low in relation to other parts of Europe, compared to 12.1 in Brussels, 11.7 in Iceland and 13.2 in the Île de France, for example. However, a decline has been observed in many regions; for example, the EU27 average fell from 10.5 in 2000 to 8.7 in 2022. There are big differences between some regions or Turkey or France, with higher birth rates, and some regions of Spain, where these figures are less than 6, as in Galicia (5.4) and Asturias (4.7). Europe in general has seen an overall trend towards a fall in the birth rate, showing an ageing population and a reduction in the fertility rate.

The figures for recent years show a rising trend in the mortality rate in the Basque Country, and while the COVID-19 pandemic caused an even more notable increase in 2020, in general terms this trend continued in 2022. The average in the Basque Country was 10.7 per thousand inhabitants in 2022, and by regions, the highest rates were observed in Iparralde (15.4 ‰ in Basse Navarre, 14.3 ‰ in Zuberoa and 12.2 ‰ in Lapurdi). This trend is similar to that for the EU27, through the Basque Country has a lower rate than that across the EU27.

According to 2022 figures, 70.6% of the inhabitants of the Basque Country were born there (2,254,764 people), while 29.1% were born outside the Basque Country, mainly in Spain (437,106) and France (126,387). Many Basque residents were also born in other countries, such as Morocco, Colombia and Ecuador. Residents in the Basque Country without Spanish or French nationality make up 7% of the population. At European level, the Basque Country is in a middling position for the proportion of foreigners, behind Germany (26%) and France (14.1%).

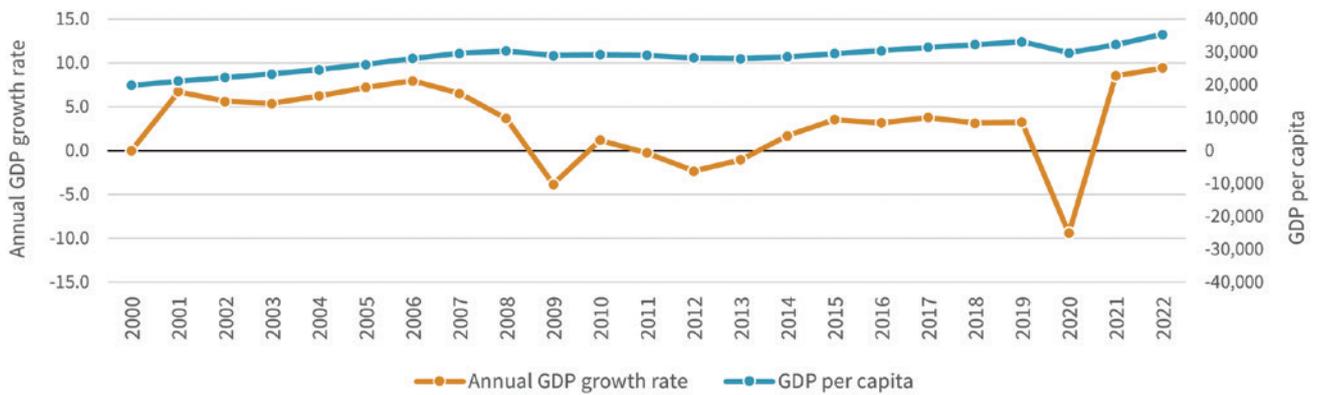


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ECONOMY

## 2.1 GDP: YEAR-ON-YEAR GROWTH

In the year 2000, the Gross Domestic Product (GDP) of the Basque Country stood at 57,629 million euros. In 2022, on the other hand, it stood at 112,811 million euros. Over this period, GDP per capita rose gradually: in particular up to 2008. After this, due to the crisis, it was held back; for example, in 2009 a fall of 3.8% was recorded. During the pandemic (2020), GDP fell again; however, in 2021 it recovered rapidly, with an 8.5% increase, and in 2022 it reached 9.4%, a growth figure that exceeded that of the previous decade.

● Current prices (million €), year-on-year growth rate in GDP, GDP per capita. Euskal Herria 2000-2022



## 2.2 GDP PER CAPITA

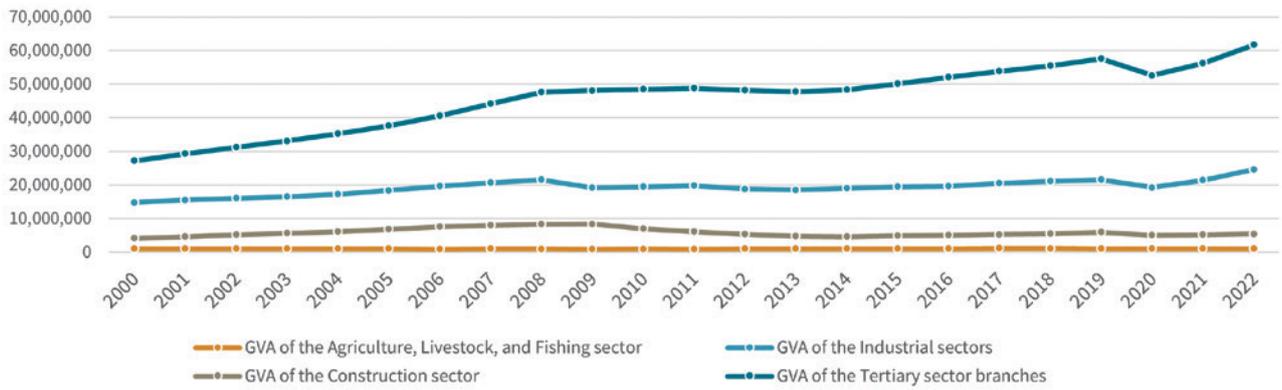
In 2022 the Basque Country recorded a Gross Domestic Product per capita of 35,309 euros, similar to those of its neighbouring regions and states. The most prosperous areas of Europe recorded a GDP per capita of over 70,000 euros; these included Hovedstad (Denmark), with 90,400 euros, and Brussels-Capital, with 77,800 euros. However, there are also areas in Europe with a much lower GDP, such as several regions of Turkey and the Balkans (between 3,700 and 8,000 euros), as well as other areas in Eastern Europe, with figures no higher than 10,000 euros.

Our GDP per capita is €35,309,  
while that of the Hovedstad region  
is €90,400.

● GDP per capita. Basque Country & European states 2022



● Structure of gross value added by branch of activity (thousand €). Euskal Herria 2000-2022

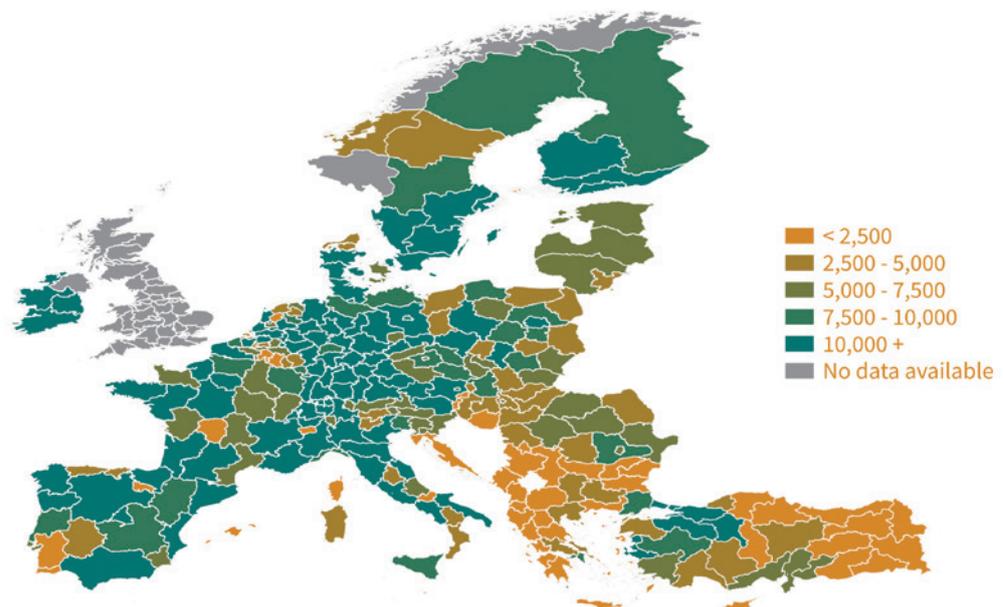


## 2.3 STRUCTURE OF VALUE ADDED

During the five-year period from 2016 to 2021 in the Basque Country, the contribution of the different areas of activity to the VAN fluctuated:

- The contribution of the industrial sector fell from 27.35% in 2016 to 26.12% in 2021, but remains significant.
- The service sector increased significantly, from 63.19% to 65.33%, strengthening most of the Basque economy.
- Construction fell from 6.04% to 5.58%, while agriculture remained relatively stable at around 1.6%.

● Value added in industry (% variation, base year 2000) in Basque Country & European regions, variation 2000-2021



In 2021, industry in the Basque Country generated added value of 21,469.55 million euros, equivalent to 26.12% of the VAN. In Europe, a comparison with certain regions in terms of the contribution of industry shows the following:

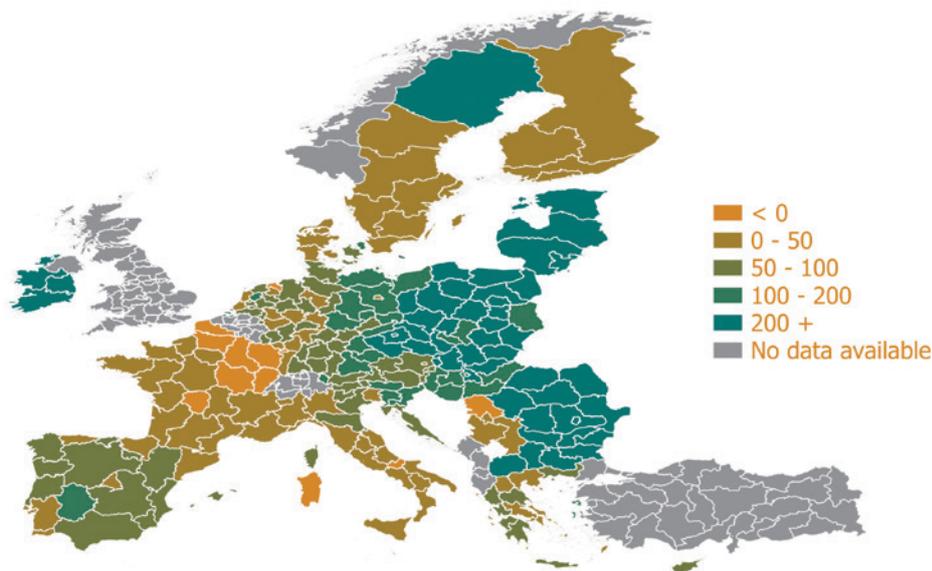
- Lombardy is the region with the highest industrial added value, at 88,484.7 million euros.
- Stuttgart, Upper Bavaria and the Île de France also exceeded 50,000 million euros in added value.
- At the bottom end are the Åland islands in Finland and the Ionian islands in Greece, with Ceuta and Melilla in Spain in last place, below 150 million euros.

In terms of trends, industrial added value has fallen considerably in several French regions, such as Franche-Comté, Picardy, Nord-Pas-de-Calais, Burgundy, Limousin, Lorraine and Champagne-Ardennes.

However, there were considerable advances in Eastern Europe, including many regions in Romania and Bulgaria.

The Basque Country falls into the group with modest growth, along with certain regions of Germany, the Netherlands and Spain.

● Value added in industry in Basque Country & European regions, variation 2000-2021



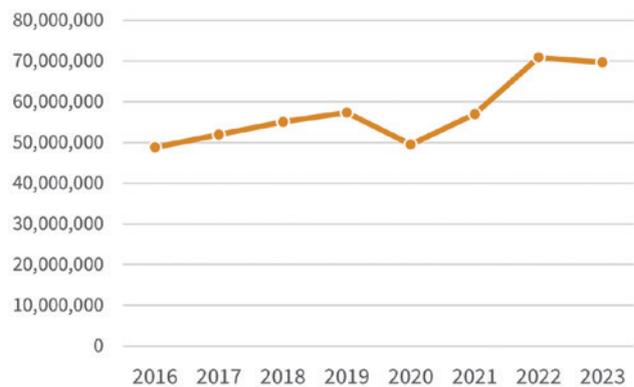
Basque industry  
 makes up 26.12% of the economy  
 and services 65.33%.

## 2.4 EXPORTS OF GOODS AND SERVICES

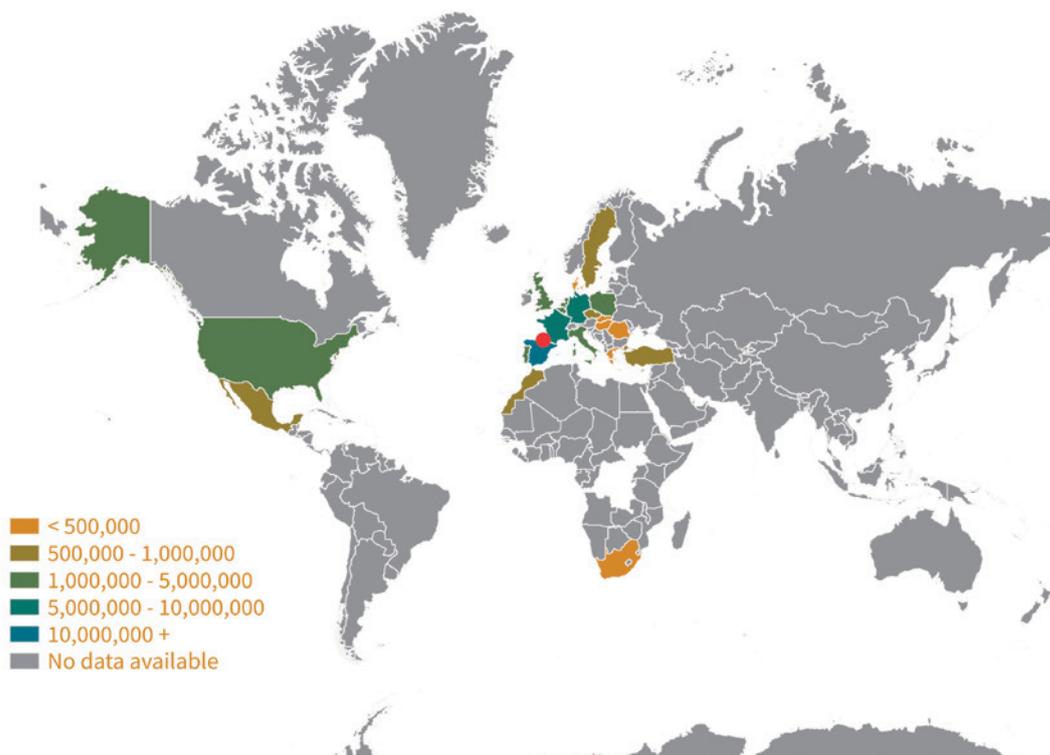
In recent years, exports from the Basque Country have increased. In 2016 they stood at less than 49,000 million euros, but two years later they exceeded 55,000 million. This figure fell significantly in 2020 due to COVID-19. The pandemic was followed by a strong recovery, exceeding 70,000 million in 2022. In 2023, on the other hand, there was a slight fall.

In terms of the destination and distribution of exports, the rest of Spain has consolidated its position as the main market and the steadiest over the years, accounting for between 37 and 39% of total exports from the Basque Country. After Spain, France and Germany were the second and third most important countries, each with a share of nearly 10%, a figure that remained fairly steady in all these years. Also important is the United States, making up around 4-5% in recent years, though this has been more variable. Italy, the United Kingdom and Portugal are other important countries, all with percentages varying between 2 and 4%.

● Exports from the Basque Country. Volume (million €). 2016-2023



● Exports from Basque Country, destination (million €). 2023



Exports from Basque Country, destination. % volume. 2016-2023

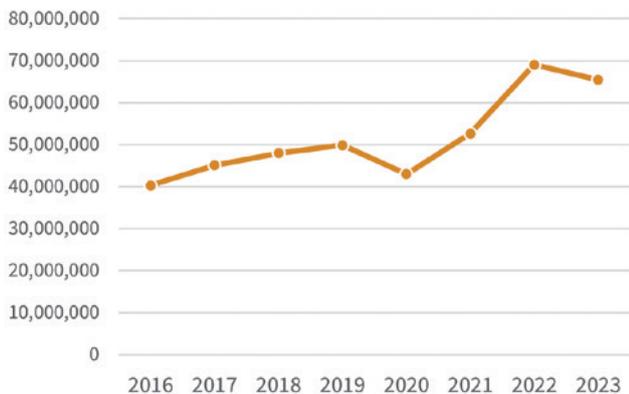


## 2.5 IMPORTS OF GOODS AND SERVICES

The volume of imports to the Basque Country saw a notable increase between 2016 and 2023, in general maintaining an upward trend. In 2016, imports came to 40,262 million euros and in 2023 they reached 65,452 million euros, an increase of 62% over a seven-year

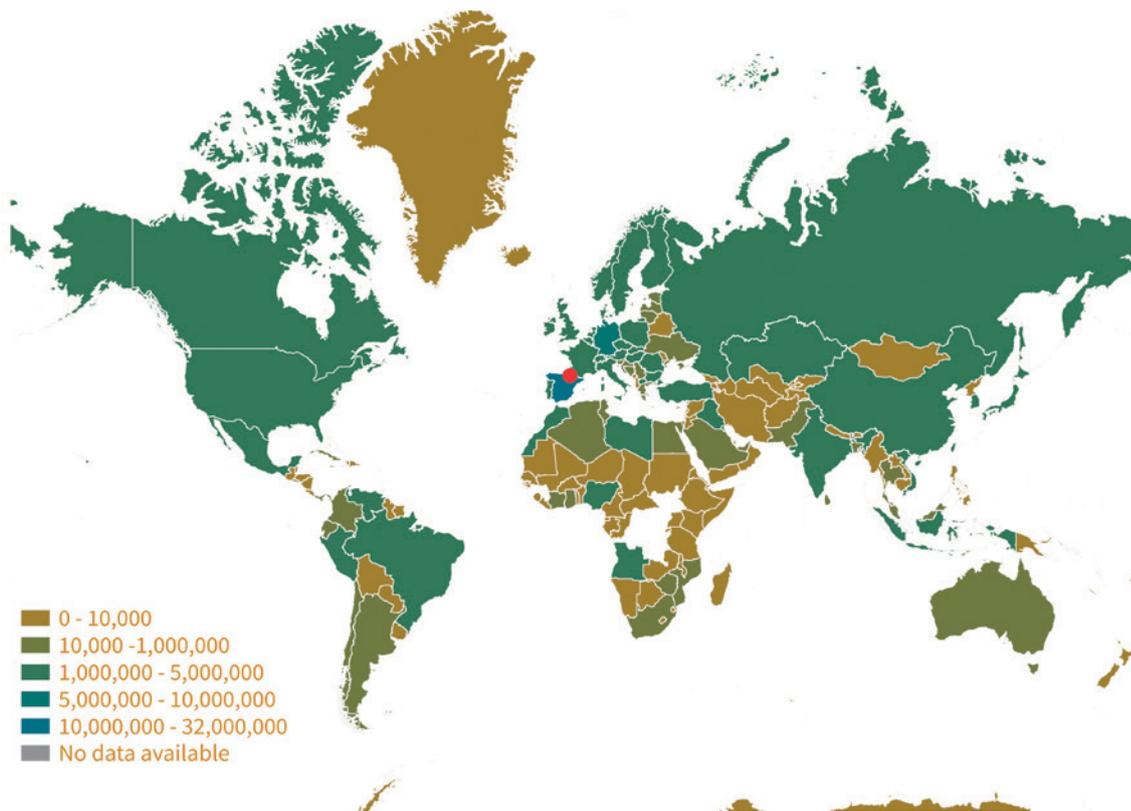
period. As a consequence of the pandemic, imports in 2020 fell to 42,955 million euros; however, since 2021 they increased again, to a peak of 69,038 million euros in 2022. While this figure fell slightly in 2023, it is considerably higher than in the years before the pandemic.

Imports to Basque Country. Volume (million €). 2016-2023



As regards the source of imports, Spain was the Basque Country's main supplier, accounting for 46.3% of the total in 2022 and 48.3% in 2023. Germany (8.5%), France (4.5%) and China (4.1%) are the next countries in importance. Other countries such as the United States (2.9%) and Italy (2.7%) also have a certain weight, though their percentages are considerably lower.

● Imports to Basque Country, source (million €). 2022

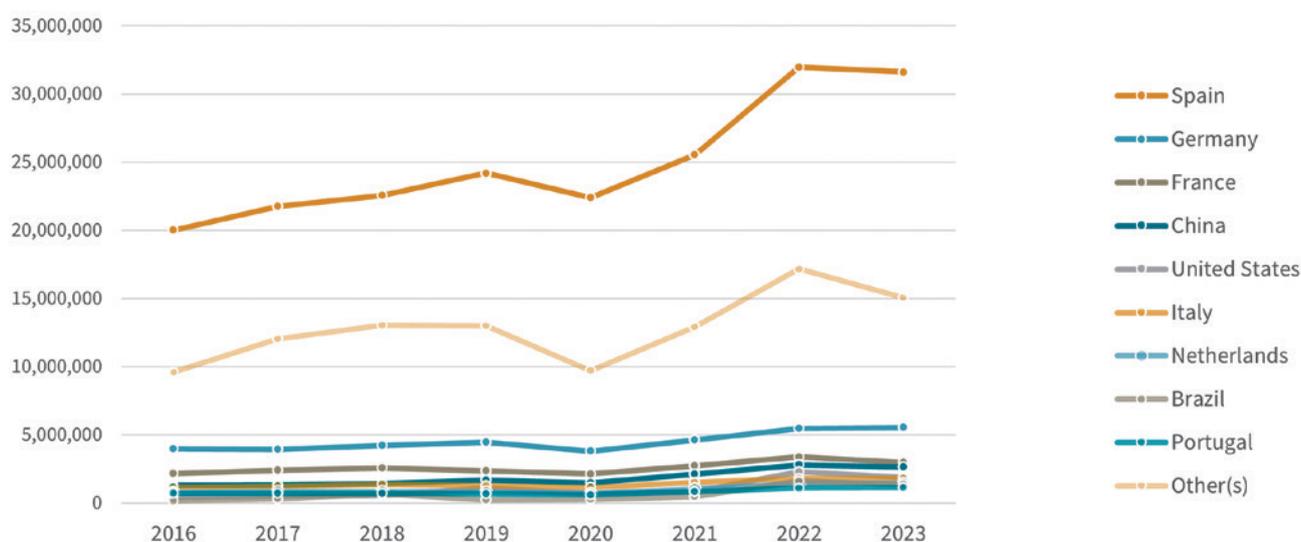


With regard to the origin of imports, Spain is the main supplier to the Basque Country, making up 48.3% of the total.

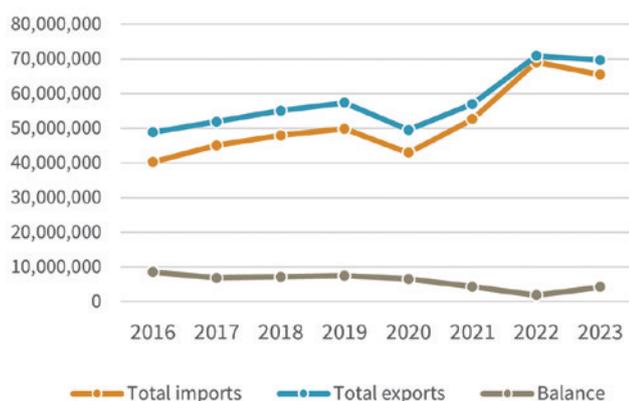
During the period from 2016 to 2023, the source of imports remained largely constant, though the percentages from certain countries varied slightly. Spain was always the most important every year, with a share of around 45-50%. The percentages from Germany and France remained more or less constant,

while China's increased slightly every year, from 3.2% to 4.1%, to stand almost level with France. The share from the United States also grew, mainly from 2021, to reach 3.3% in 2022. The share of imports from other countries (the Netherlands and Poland, for example) has also increased in recent years.

● Imports to Basque Country, source. Volume (million €). 2016-2023



● Basque Country balance of trade (million €). 2016-2023



## 2.6 BALANCE OF TRADE

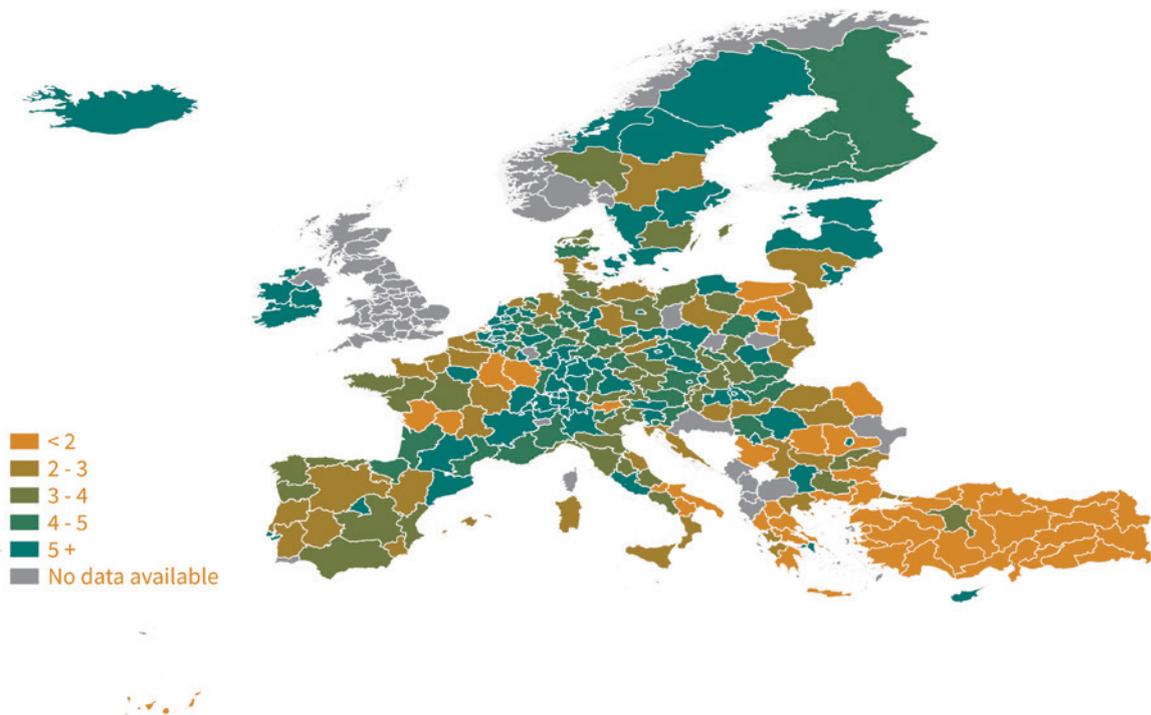
The balance of trade, an indicator that reflects the difference between exports and imports, has been narrow in recent years, though exports exceeded imports throughout the period. In 2016 the balance of trade was positive, with a surplus of 8,589 million euros. However, this fell significantly in 2021, to a surplus of 4,388 million euros. In 2022 the surplus reached its lowest point, at 1,863 million euros, meaning that exports only just exceeded imports that year. To understand this, one must observe the dynamics since 2021, when both imports and exports saw a notable recovery. However, imports have grown more rapidly than exports, which has worsened the balance of trade. In 2023, as in previous years, exports exceeded imports, but the margin was wider. The situation has therefore improved slightly and the surplus has increased to 4,240 million euros.

## 2.7 INNOVATION ACTIVITIES

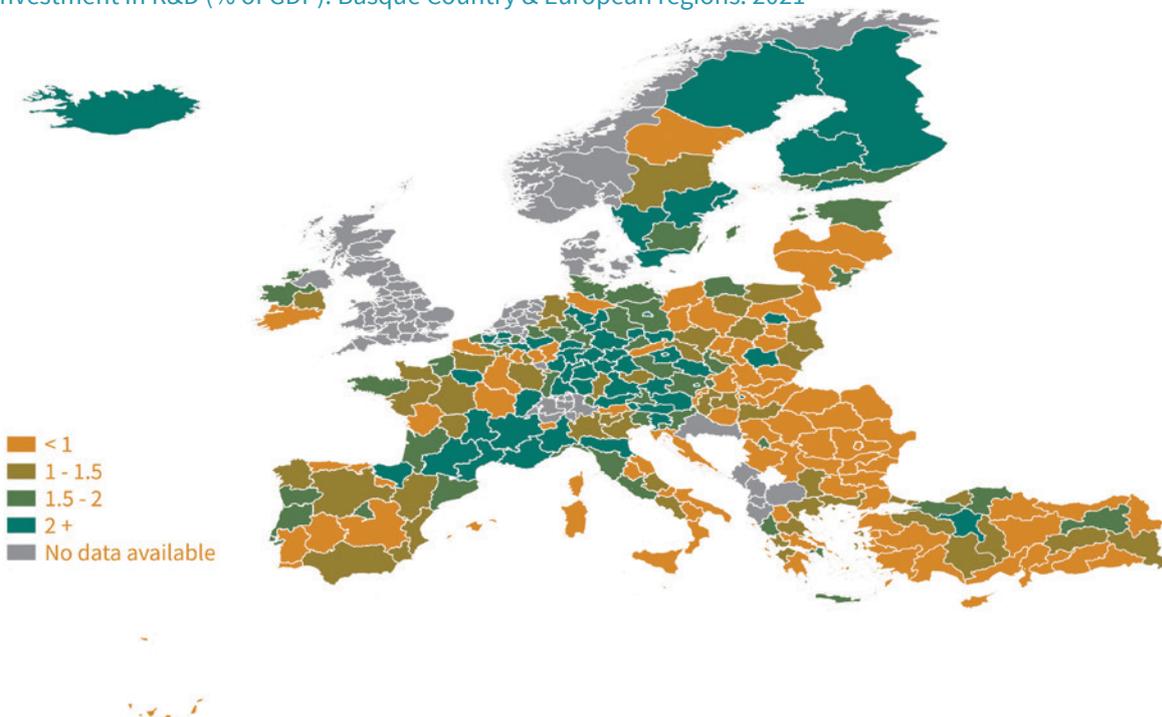
In Europe, every region has its own economic and technological characteristics, with research and development (R&D) determined by the level of investment and of high-tech jobs. For example, in the Basque Country 2.2% of GDP was assigned to research and development in 2021, a figure very similar to the EU27 average (2.3%).

European areas like Brussels (Belgium) and Stuttgart (Germany) stand out for their high levels of employment in R&D and technology. In Brussels, 2.5% is invested in R&D, and high-tech employment accounts for 6.7%. Upper Bavaria in Germany and the Île de France are also competitive in terms of high-tech jobs, at 8.2% and 9.4% respectively.

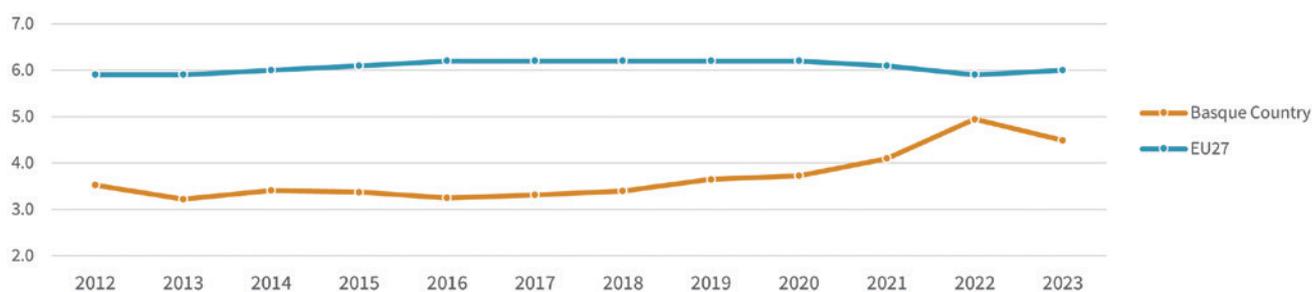
● High-tech activities (% employment) Basque Country & European regions. 2023



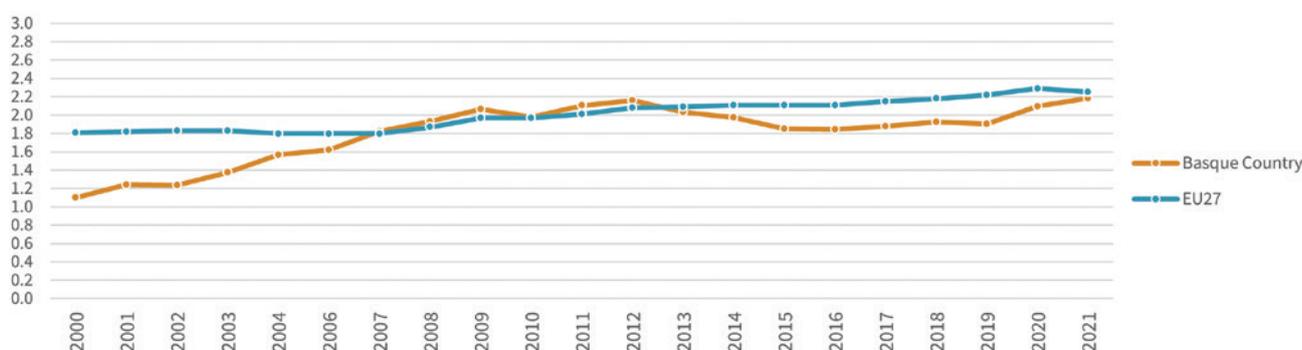
● Investment in R&D (% of GDP). Basque Country & European regions. 2021



### Advanced technology sectors. Percentage of total employment. Basque Country & EU27 2012-2023



### Investment in R&D (% of GDP). Basque Country & EU27. 2000-2021



In Eastern Europe, Prague and Budapest stand out for high-tech jobs. Investment in R&D stands at 2.8% in Prague, and high-tech employment at 12.7%. Scandinavian regions also have high figures, for example Stockholm (11.1%) and Helsinki (10.9%).

Investment in R&D in the Basque Country as a percentage of GDP has come closer to the EU27 over these two decades. In the period from 2007 to 2012 the Basque Country was even above this average. It then slipped back, while remaining closer than in 2000. However, in terms of the percentage of total employment in cutting-edge technology sectors, the Basque Country is further behind the EU27 average. This margin has shrunk. Nevertheless, in 2023 the percentage of employment in cutting-edge technology in the Basque Country remained 1.5 points lower (between 2013 and 2019 an annual difference of at least 2.6 points behind the EU27 was recorded).

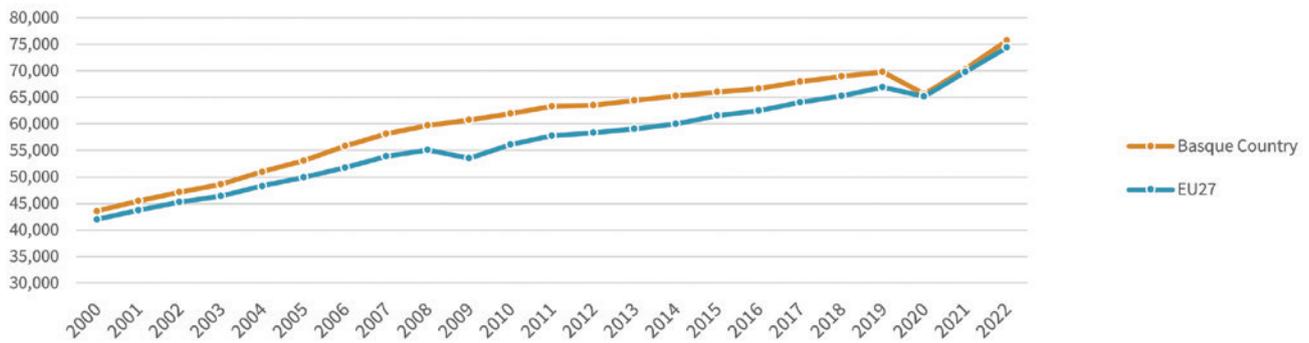
## 2.8 LABOUR PRODUCTIVITY

These figures show annual nominal labour productivity in euros. They allow the Basque Country to be compared with the EU27 countries. The trend in productivity between 2000 and 2022 in the Basque Country and nominal productivity across the EU27 is one of growth,

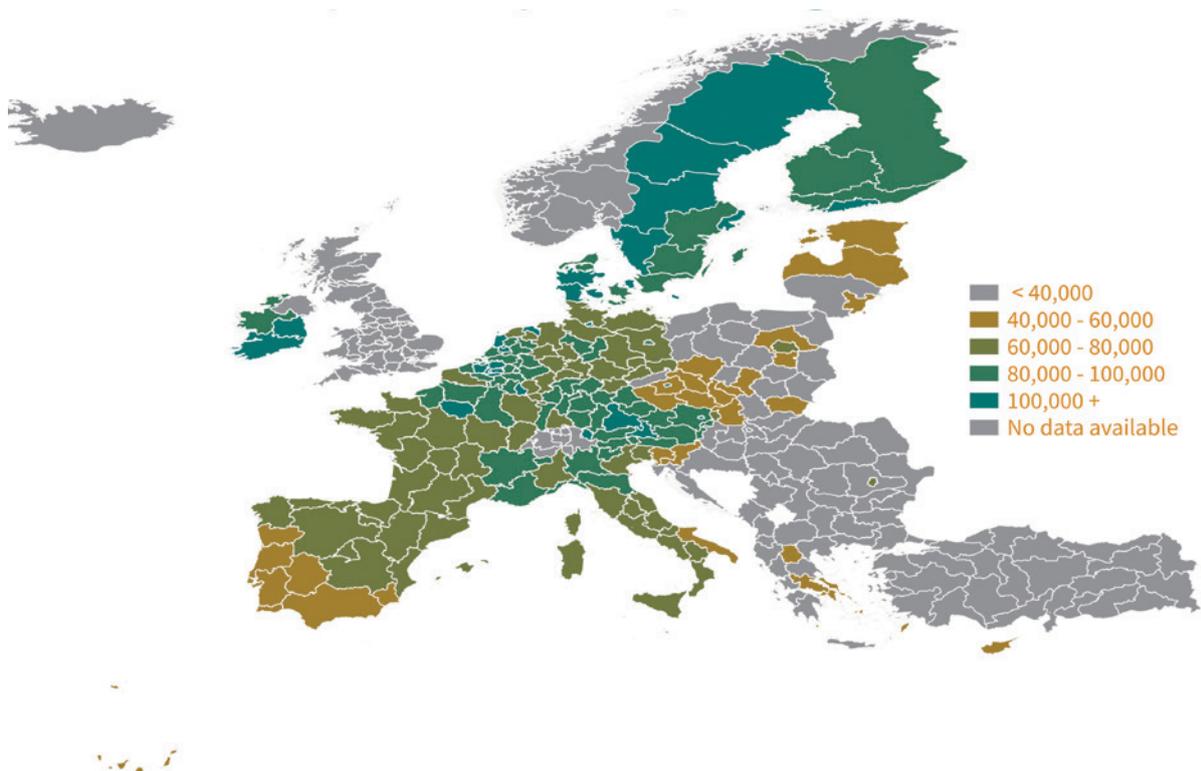
though with some fluctuations; in particular, the effects of the 2008 crisis and the 2020 COVID-19 pandemic.

In 2023 productivity in the Basque Country was close to the EU27 average (€75,682 and €74,400 respectively). Some EU27 regions have higher or lower productivity; Belgium, Denmark and Luxembourg are comfortably above the EU27 average, while some regions of Bulgaria and Romania are significantly below the average.

Nominal labour productivity (€), Basque Country & EU27. 2000-2023



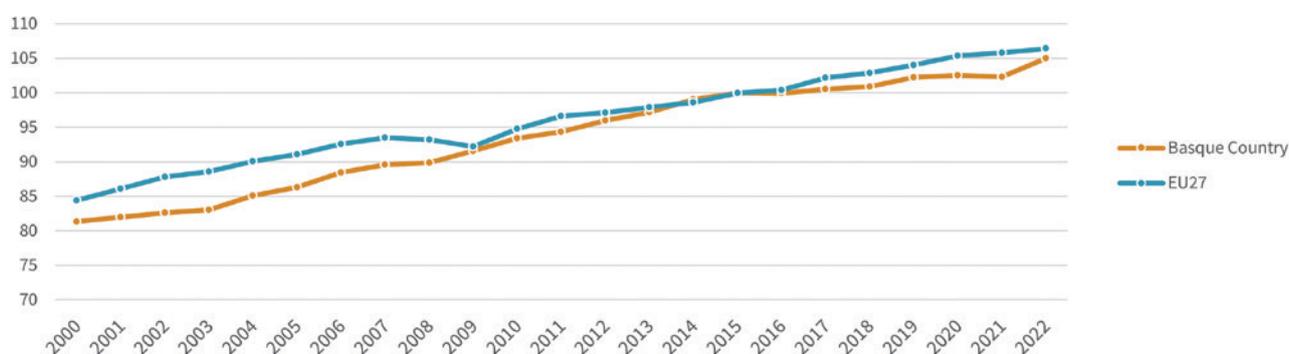
Nominal labour productivity (€). Basque Country & European regions. 2023



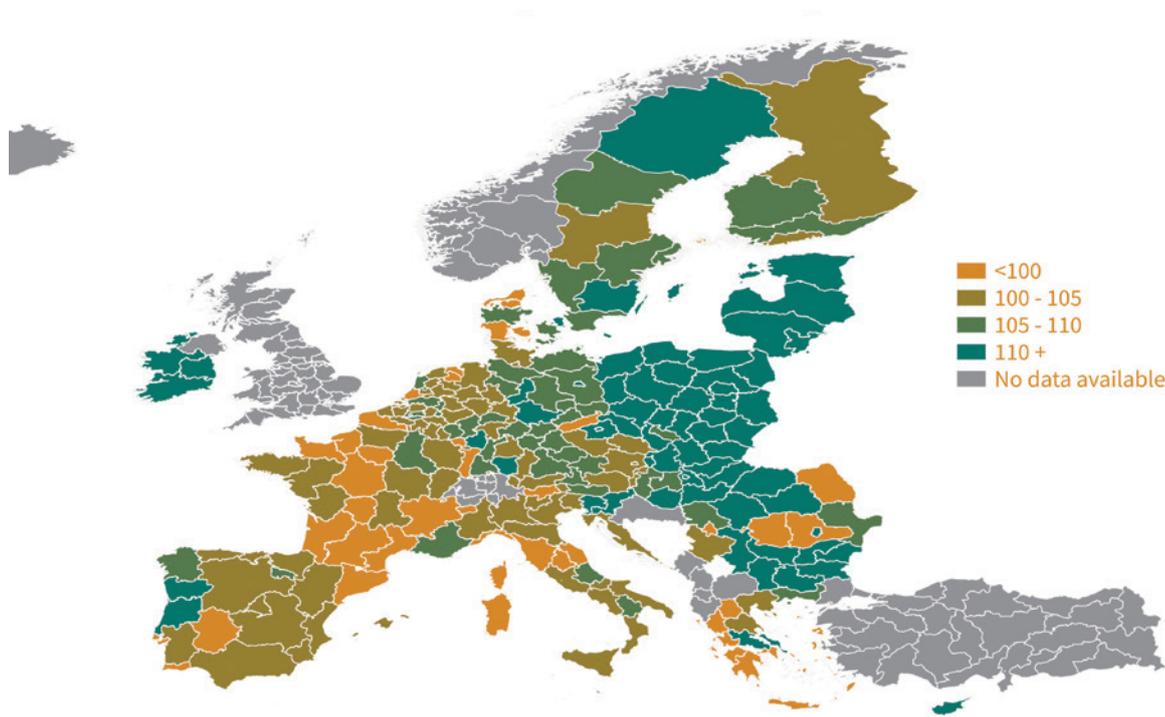
Real productivity per hour of work is an indicator used to assess the productivity of workers in an economy and is important in understanding the strength and competitiveness of a country or region's economy. To study real productivity per hour of work in the Basque Country and the EU27, the record from 2015 was taken as a point of reference and increases or decreases assessed in percentage points in relation to this point. Analysis of the Basque Country and the 27 states in the European Union (EU27) between 2000 and 2022 shows how productivity has developed and what the comparative situation is.

In the Basque Country, real productivity per hour worked stood in 2000 at 81.4 points but by 2022 had reached 105.0 points. Thus, a notable increase of 29.3% can be observed over this period. On the other hand, average productivity across the EU27 rose from 84.4 to 106.4 points, an increase of 25.9%. This shows there has also been solid progress at European level. However, the Basque Country experienced a slightly faster increase, and in 2022 the index points to productivity in the Basque Country approaching the European average.

● Real labour productivity per hour (2015 = 100), Basque Country & EU27. 2000-2022



● Real labour productivity per hour (2015 index), Basque Country & European regions. 2022



Figures from 2022 make it clear that the Basque Country is in a good position in European terms. Among European regions, some stood out for their progress in productivity. For example, Belgium has very high productivity, with a positive trend, and some regions of Bulgaria have achieved high productivity rates, with very good results in 2022 (between 115 and 120). Some German regions, especially in the east, also have higher productivity per hour, showing a significant improvement.

On the other hand, there are regions that have evolved poorly; Greece and Spain stand out here. Most Greek regions have low productivity, with slower progress (below 100). There are also Spanish regions that are below average and need to improve their productivity.

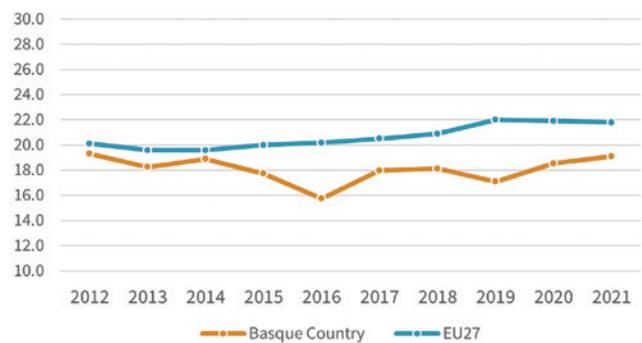
The figures for the Basque Country indicate that while it is below the European average, fixed investments remain steady, which can have a significant impact on economic growth.

Compared to the other European regions, the Basque Country is in the lower half. In high positions are the regions of North-East Europe, Hungary, Romania and Germany, as well as some Czech and Dutch regions (Southern Transdanubia, București - Ilfov, the Northern Great Plain, Zeeland, Central Bohemia and Trier), with values over 30. In the lower positions are Greece and the eastern regions. Close to 15 are North-West Bulgaria, Central Macedonia, Silesia, Severozapaden and Attica.

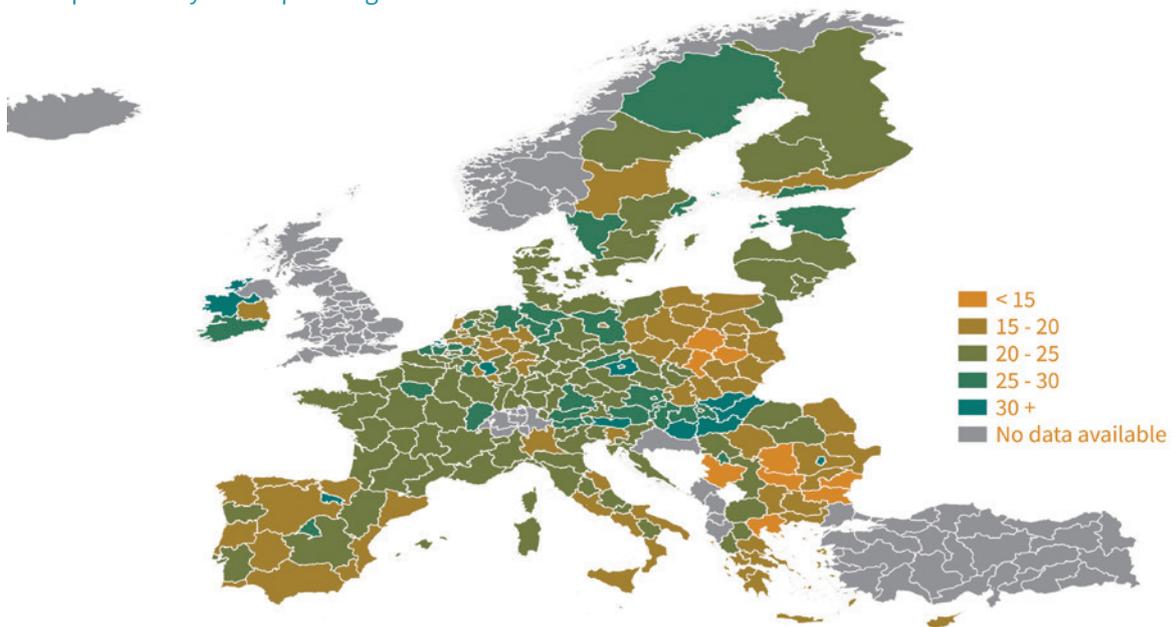
## 2.9 BUSINESS INVESTMENT

In the Basque Country, gross fixed capital formation (GFCF) fell from 19.3% in 2012 to 19.1% in 2021. This indicates that the essential resources and investments have been defined in the last decade. It bottomed out in 2015 at 17.7%, after which it rose gradually to stand at 19.1% in 2021.

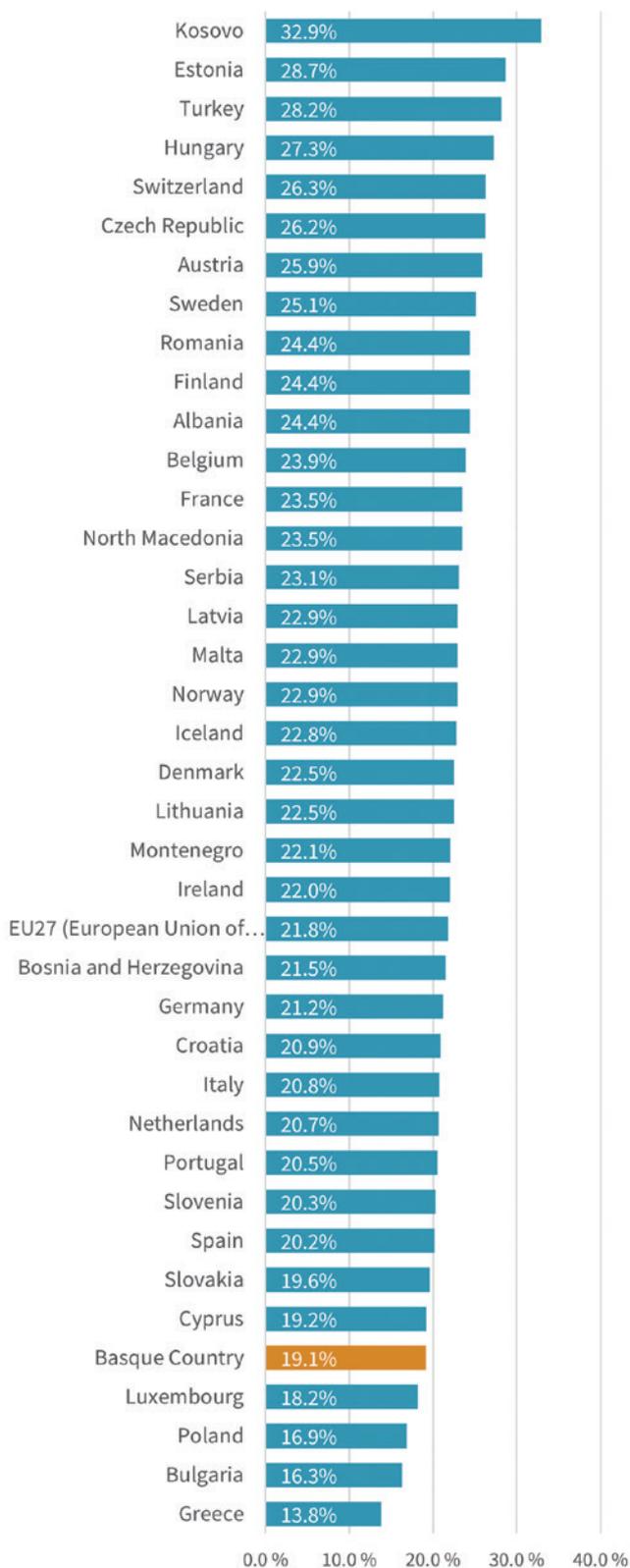
Gross fixed capital formation (GFCF) (% of GDP). Basque Country & EU27 2012-2021



Gross fixed capital formation (GFCF) (% of GDP). Basque Country & European regions. 2021



Gross fixed capital formation (GFCF) (% of GDP). Basque Country, EU27 & European states. 2021



In relation to European countries, the Basque Country, with a percentage of 19.1%, is in the lower half. Below the GFCF of Germany, at 21.2%, France at 23.5% and Sweden at 25.1%. Greece, on the other hand, as a figure of 13.8%, the lowest fixed investment in Europe.

Productivity in the Basque Country is below the European average, but is approaching it.



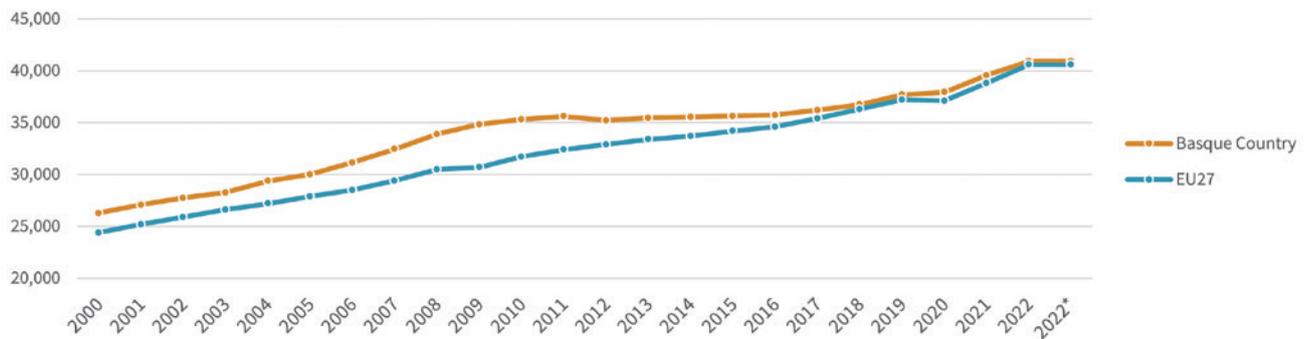
## 2.10 REMUNERATION

The average salary per worker in the Basque Country in the year 2000 stood at around 26,279 euros, and has increased constantly in recent years. Over the period from 2000 to 2022, pay rose by 14,650 euros (from 25,279 euros in 2000 to 40,929 euros in 2022). This is very close to the 40,600 average across the European Union (EU27). In other words, the Basque Country and the European

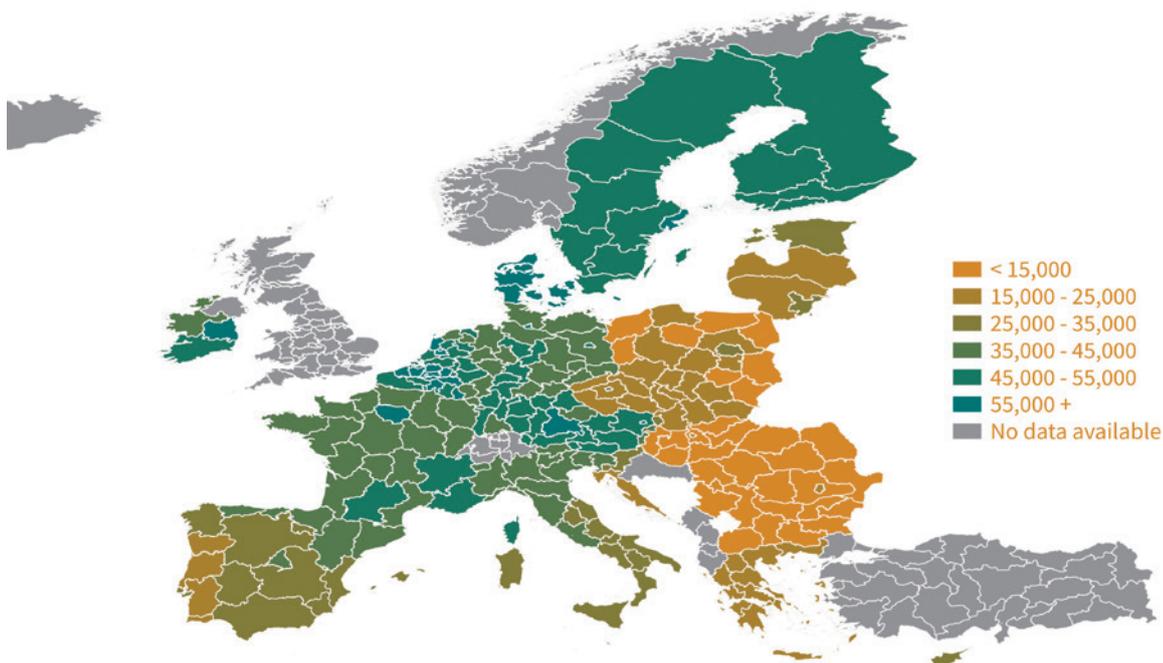
Union have progressed over the last 20 years, and the Basque Country has managed, though with difficulty, to stand slightly above the EU27 average.

In 2022, comparison with other European regions shows that salaries in the Basque Country are higher than those in several regions of Spain, for example, but lower than those in some regions of Luxembourg, Belgium, Germany or France, such as Luxembourg, Brussels, Flemish Brabant, Walloon Brabant and Hovedstaden, all of the over 68,800 euros, as against 40,929 in the Basque Country.

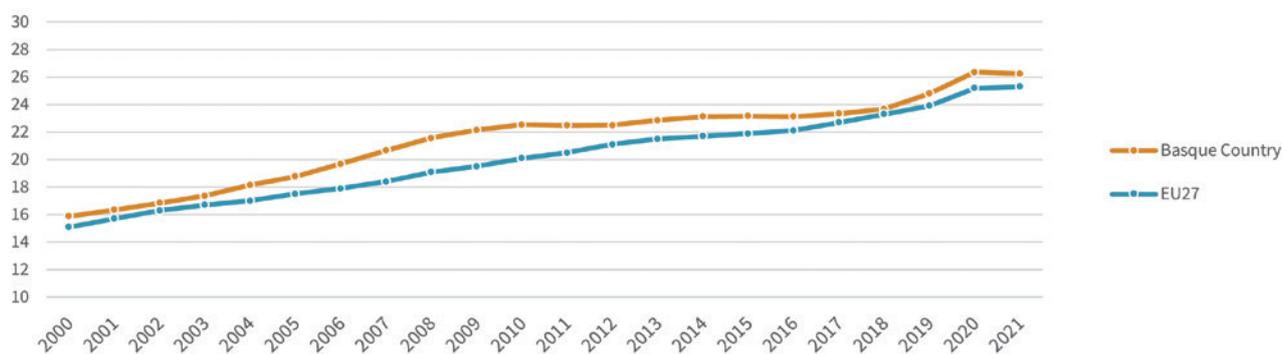
Salary per worker (€). Basque Country & EU27. 2000-2022



Salary per worker (€). Basque Country & European regions. 2022



● Salary per hour worked (€). Basque Country & EU27. 2000-2021



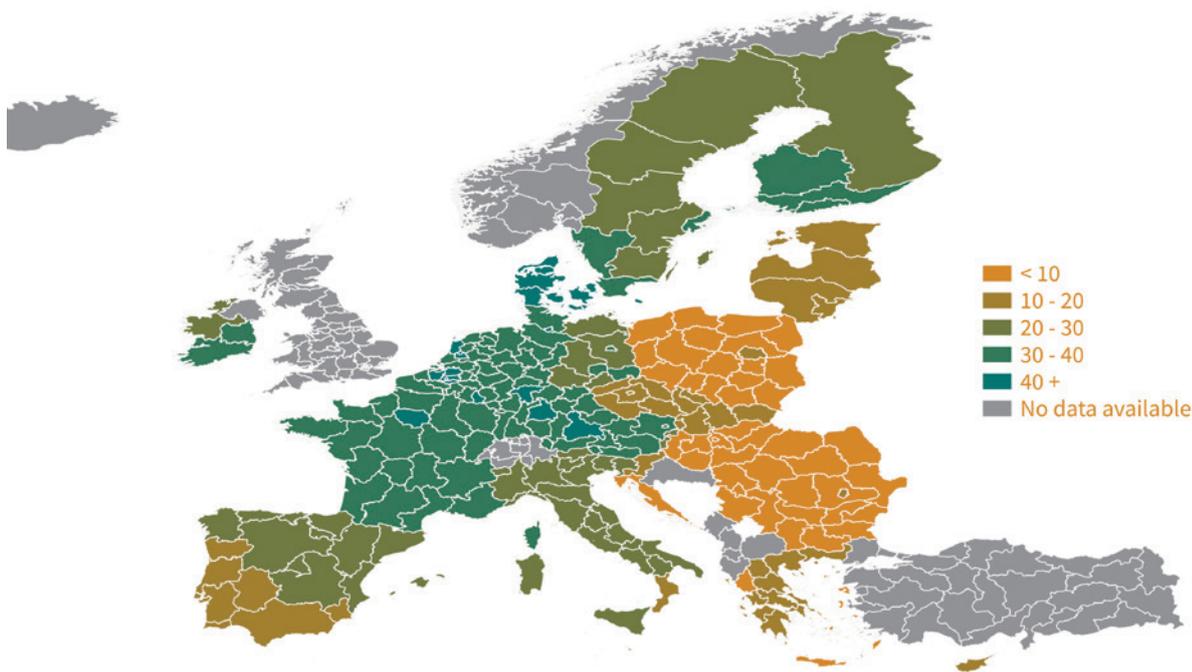
As regards salary per worker, the same trends can be seen in the average per hour worked. This stood around 15.9 euros in the Basque Country in 2000, as against 26.25 euros in 2021. This reflects the increase in this pay, which has risen by 10.35 euros in 21 years. In comparison with the EU27 average, pay per hour worked in the Basque Country (25.3 euros) is close, but still slightly lower.

In comparison with European regions (from 51.7 in Luxembourg or 50.1 in Brussels, down to 5.5-5.8 in regions of Romania), the Basque Country is clearly in the bottom half of the ranking.

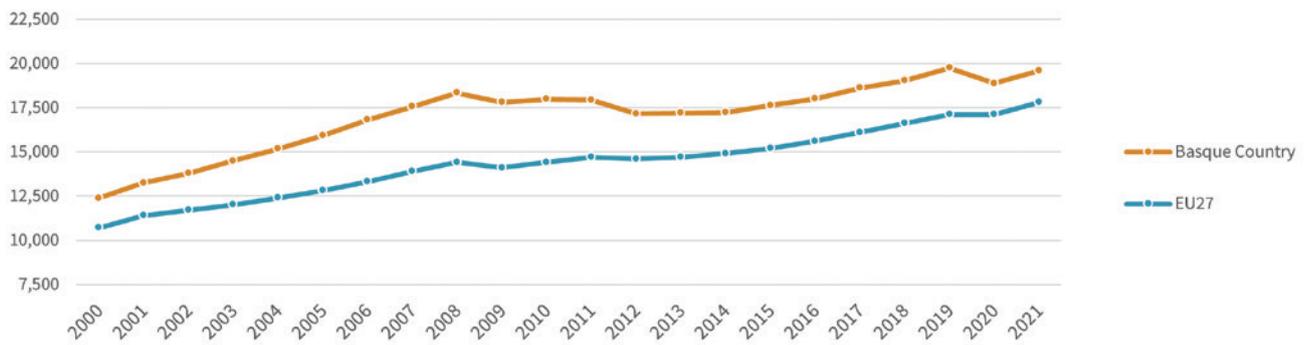
## 2.11 CITIZEN INCOME

In the year 2000, disposable income in the Basque Country was 12,375 euros and has risen steadily to reach 19,584 euros by 2021, an increase of 7,209 euros. This indicates that the Basque Country has improved disposable income. Disposable income in the European Union (EU27) stood at 10,700 in 200 and by 2021 was 17,800, an increase of 7,100 euros. In 2021 there was a difference of 1,784 euros between disposable income in the Basque Country and the EU27.

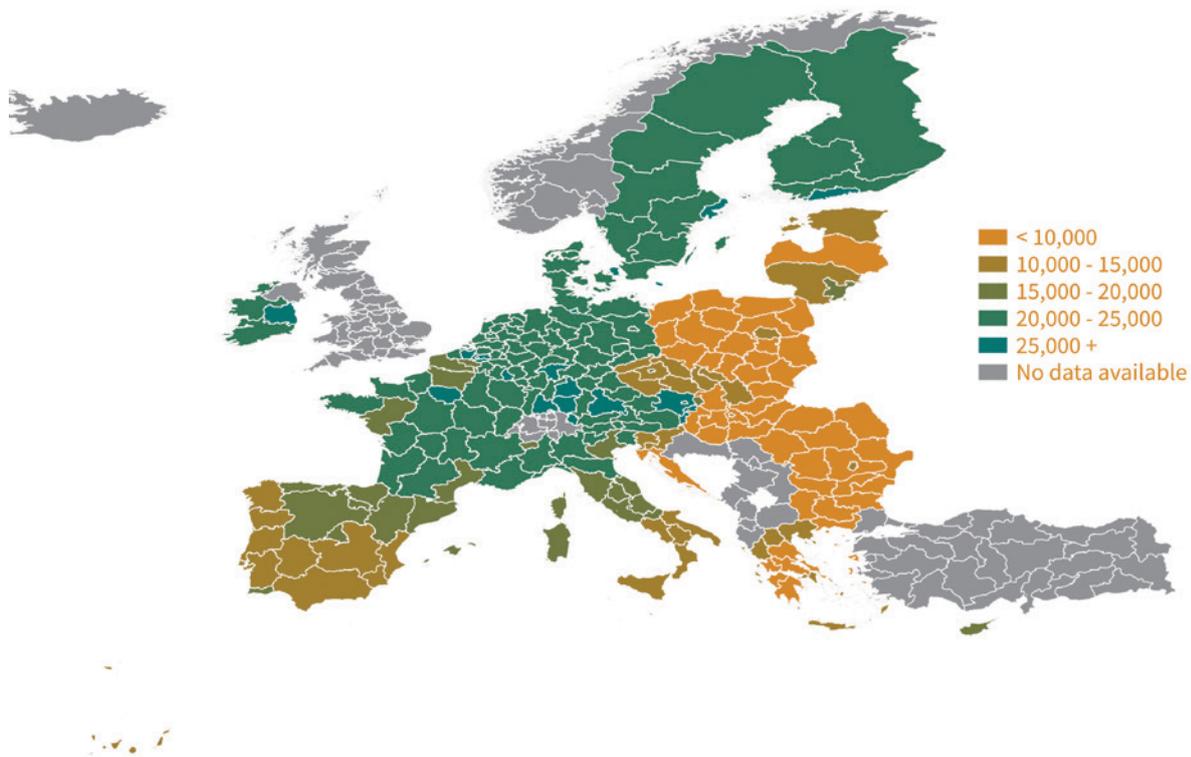
● Salary per hour worked (€). Basque Country & European regions. 2022



● Disposable income (€). Basque Country & EU27. 2000-2021



● Disposable income (€). Basque Country & European regions. 2021



Disposable income in the Basque Country, which reached 19,584 euros in 2021, exceeds average disposable income in the European Union (EU27) (17,800 euros). However, there are several European regions, in particular those in the north and west, where disposable income is higher. For example, in Luxembourg in 2021, disposable income was 36,700 euros, the highest in Europe. Sweden, known for its high quality of life, had a disposable income of nearly 26,000 euros. In Germany, the benchmark economy, average disposable income in 2021 was around 28,000 euros. And Denmark, with

a strong welfare state, had an average income of around 27,000 euros.

Thus, the Basque Country has a high disposable income, but in Luxembourg and Northern Europe, for example Sweden, have even higher incomes. The Nordic countries in general have a high disposable income.

In contrast, many countries in Eastern Europe, such as Bulgaria (4,500 euros in 2021) and Romania (nearly 7,000 euros), have a considerably lower disposable income.

The trend in the economy of the Basque Country has in general been positive, in that GDP and VAN have risen, despite the global crisis and the pandemic that hit in 2009 and 2020. In 2022 GDP per capita in the Basque Country was 35,309 euros, in line with the European average. However, in Europe big differences can be seen between the most prosperous regions and the least developed ones, with a GDP per capita varying between 3,700 and 90,400 euros.

In the Basque Country, the service sector accounts for the majority of gross added value, at around 65%. The contribution of industry has fallen slightly in recent years, but it remains an important part of the economy of the Basque Country, also in relation to other industrialised European regions.

From 2000 to 2021, several European regions underwent significant changes in industrial added value, some seeing sharp decreases and other rapid increases. In the Basque Country, industrial growth was 45.2%, a moderately upward trend, similar to that observed in other industrialised regions.

The evolution of the volume and destination of exports reflects the stability of Basque exports and the fluctuations arising from the pandemic, as well as the maintenance of their main markets, Spain, France and Germany first among these.

As in the case of exports, Spain leads in imports to the Basque Country, though the share of China and the United States is rising. On the other hand, the consequences of the pandemic had a significant impact in 2020, but recovery was rapid in the following years, especially in 2021 and 2022.

In recent years, the Basque Country's balance of trade has tended to weaken, primarily because of the considerable increase in imports. However, exports have grown steadily, and in 2023 the balance of trade improved slightly. These figures indicate that the economy of the Basque Country is increasingly dependent on trade beyond its territory.

The Basque Country is similar to the European average for investment in R&D, though there are regions that sustain a faster pace in creating high-tech jobs.

With regard to the evolution of productivity, there are European regions that have progressed, such as Belgium, Bulgaria and some German regions, achieving high productivity rates. The Basque Country has also made progress, though it remains behind them. Other regions, such as Greece and Spain, have seen a negative trend. The Basque Country stands at 104.98 points, similar to the European average.

the Basque Country has a moderate GFCF rate, which has remained steady in recent years at below the European average. Other European regions and states have large fixed investments, and the Basque Country is in the bottom half in this respect.

From the year 2000 to 2022, pay per worker in the Basque Country rose by 14,650 euros, to reach 40,929 euros in 2022. In the year 2000, pay per hour worked stood at 15.9 euros, while by 2021 it had risen to 26.25 euros. These figures place the Basque Country slightly above the EU27 average, but less than half that of some regions in the EU27.

Disposable income in the Basque Country, at 19,584 euros in 2021, is above the average disposable income in the European Union (17,800 euros), but is far below that of some countries in the north and west of Europe, such as Luxembourg (36,700 euros) or Sweden (26,000 euros). On the other hand, Eastern European countries have much lower incomes, for example Bulgaria, with 4,500 euros, and Romania, around 7,000 euros. Thus, the Basque Country is among the countries with high disposable income, but still faces challenges in competing with higher-income countries.





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SOCIETY

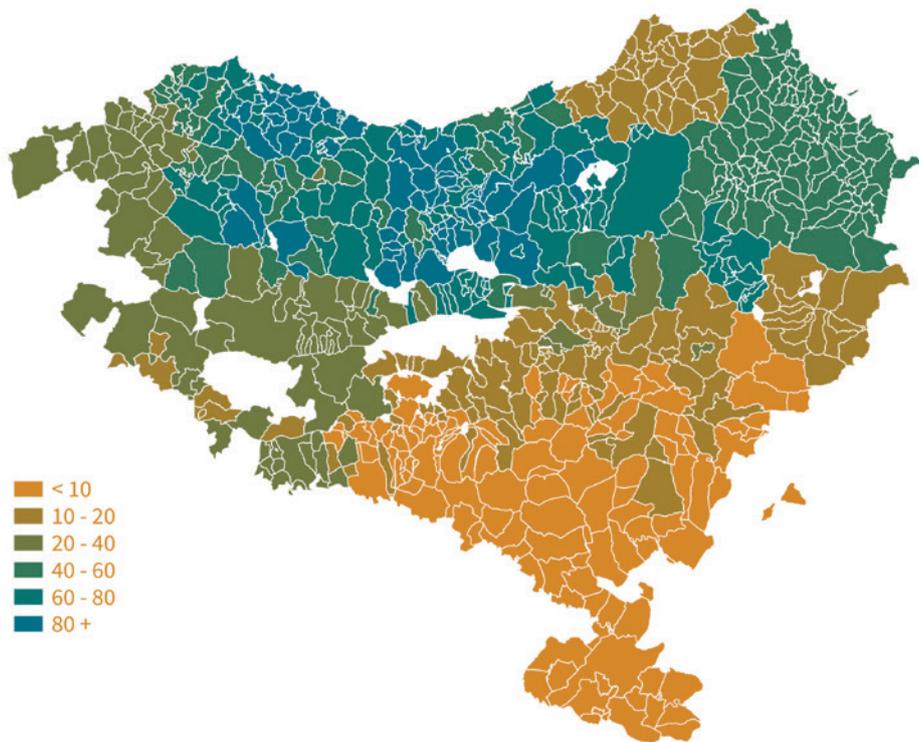
### 3.1

## BASQUE LANGUAGE

According to the 2021 sociolinguistic survey, 30.2% of the population is Basque-speaking (people over 16 years old). This percentage is significantly higher in proportional terms in the most Basque-speaking communities of the Basque Country: Oresa (93.6%), Errezil (93.0%), Ajanguiz (92.6%), Abaltzisketa (92.3%), Zerain (92.2%), Arantza (91.8%) and Araitz (91.4%). The opposite extremes display very different proportions:

Corella, Milagro, Ribaforada, Valtierra, Azagra, Cabanillas and Monteagudo, all with less than 0.5%. Thus, the map shows that the most Basque-speaking areas are found in small and medium-sized localities in the provinces of Bizkaia and Gipuzkoa, while the most Spanish-speaking areas are found in southern Navarre, including in towns and cities.

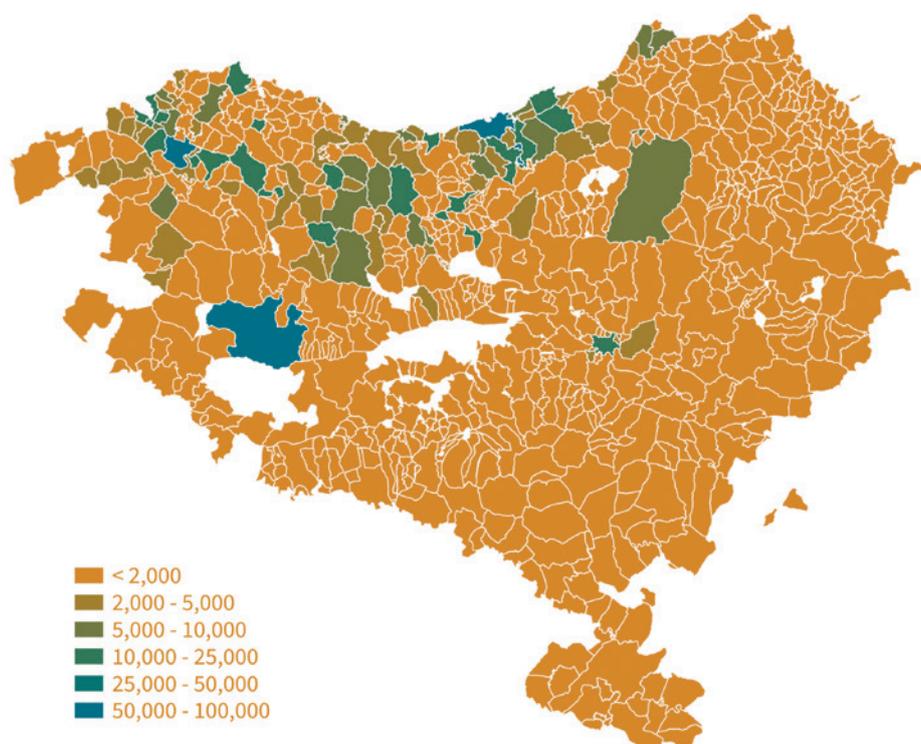
● Proportion (%) of Basque speakers. By municipality. 2021



The most Basque-speaking areas are to be found in small and medium-sized localities, and the most Spanish speakers in southern Navarre, including in urban centres.

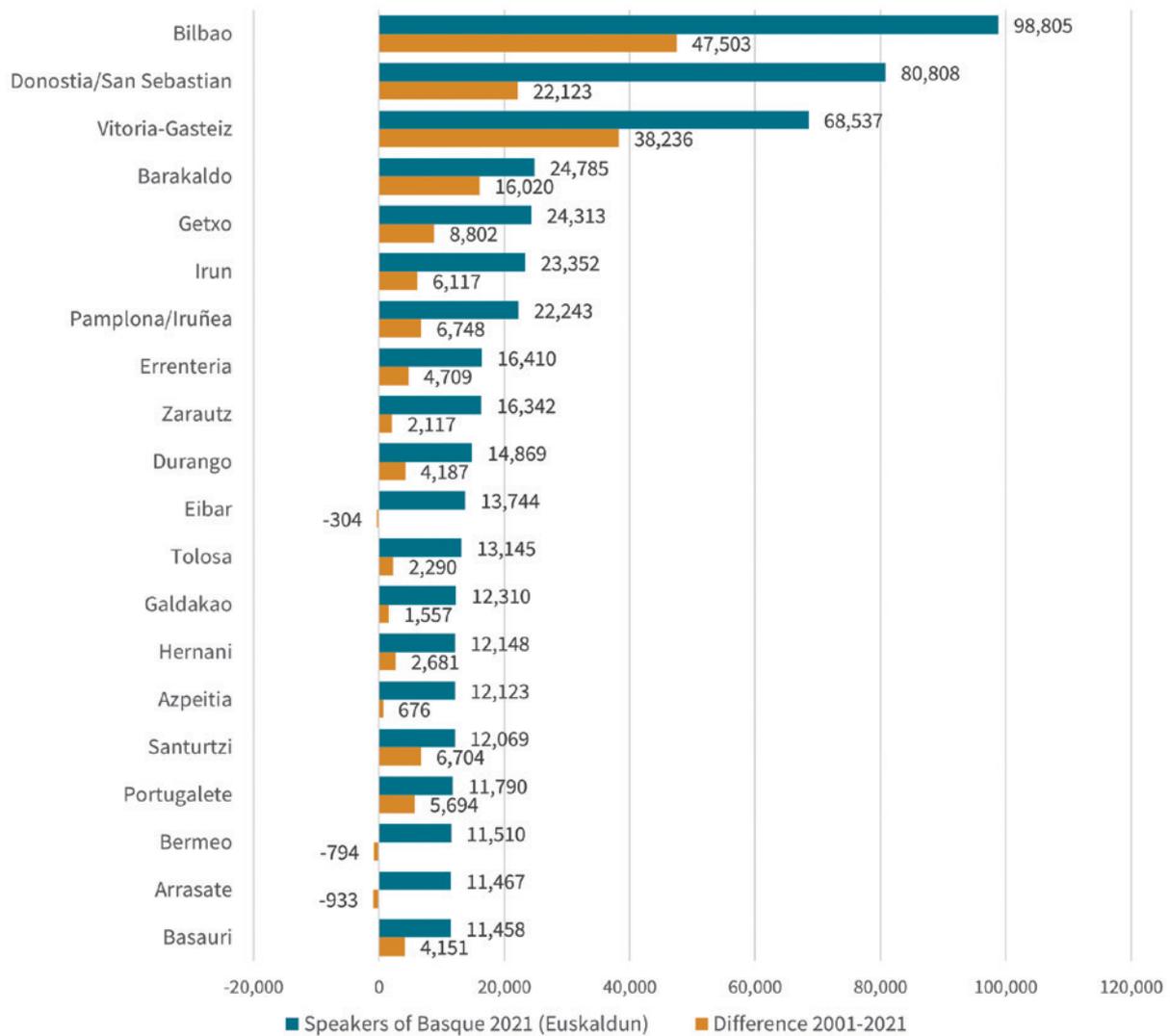
On the other hand, if the focus is shifted to numbers of Basque speakers rather than proportions, the map changes. The most Basque speakers are to be found in urban areas: Bilbao (98,805 Basque speakers), Donostia (80,808), Vitoria-Gasteiz (68,537), Barakaldo (24,785), Getxo (24,313), Irun (23,352), Pamplona (22,243) and Errenteria (16,410).

● Number of Basque speakers per municipality. 2021

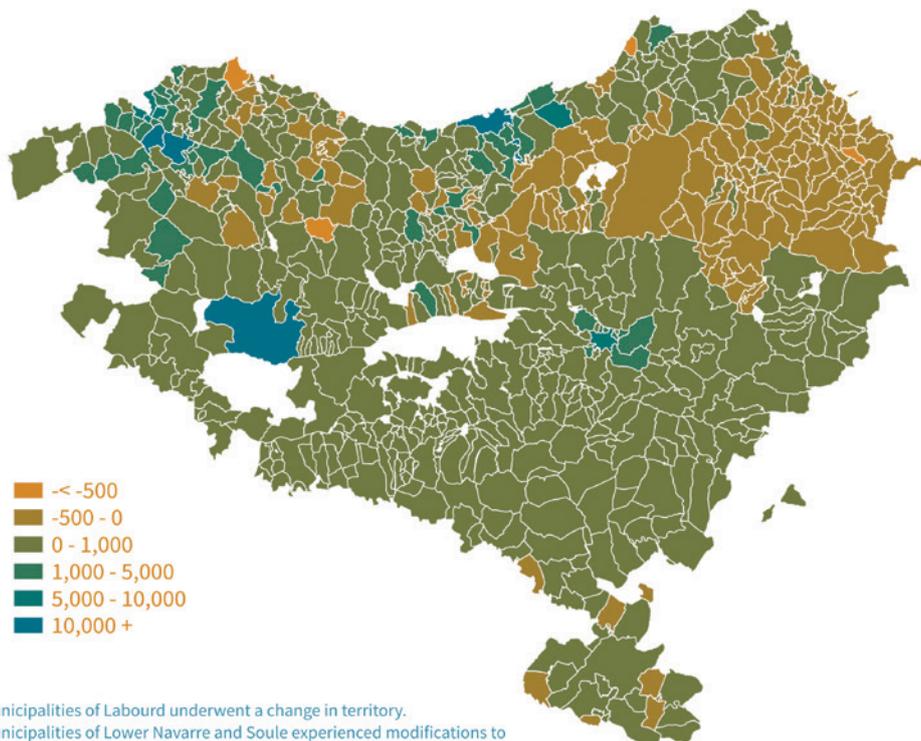


But it has not always been like this. These urban centres are the municipalities with the largest numbers of Basque speakers today, because in recent years many people have learnt the language (mainly as children, at schools or in euskaltegi Basque centres) and the cities have absorbed Basque speakers from country areas. Observing developments in the last twenty years, the places mentioned above stand out as the ones that have gained the most Basque speakers: Bilbao (47,503 more Basque speakers in 2021 than in 2001), Vitoria-Gasteiz (38,236), Donostia (22,123), Barakaldo (16,020), Getxo (8,802) and Pamplona (6,748).

● The 20 municipalities with the largest number of Basque speakers (2021) and variation between 2001 and 2021.



Variation in the number of Basque speakers. 2001-2021. By municipality\*



The urban areas that have gained the largest numbers of Basque speakers are: Bilbao, Vitoria-Gasteiz, Donostia, Barakaldo, Getxo y Pamplona.

In terms of the variations in numbers and proportions of Basque speakers, four categories can be identified:

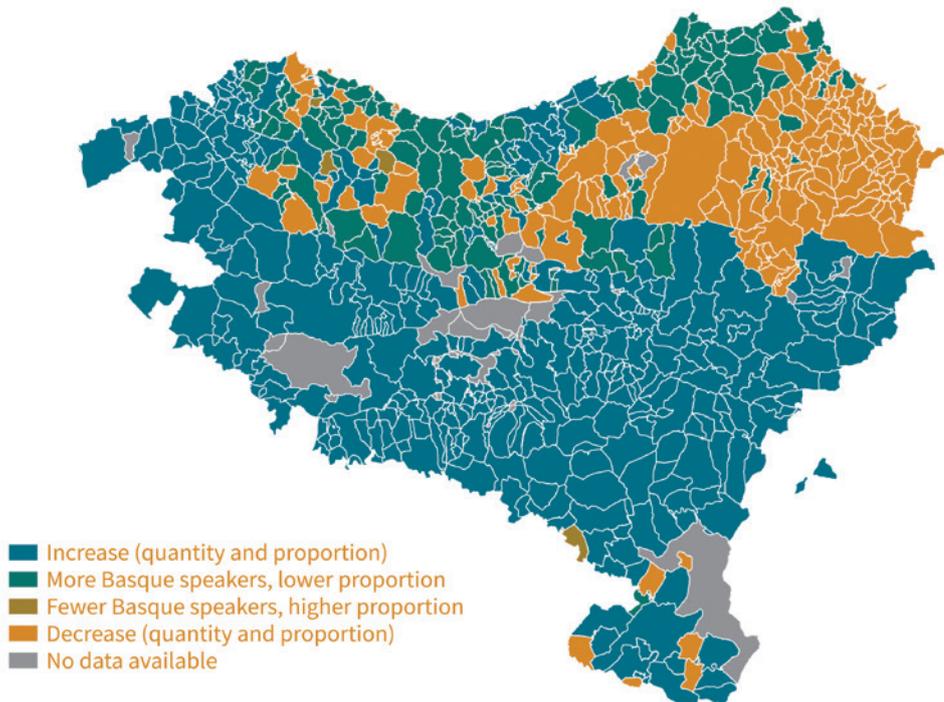
- Those that have gained both in numbers and in proportional terms: a total of 341 municipalities. The main three are those mentioned above, Bilbao, Vitoria-Gasteiz and Donostia.
- More Basque speakers but a lower proportion. 150 municipalities. The number of Basque speakers has risen. However, the population has grown and other profiles have also increased in number. The most notable examples are Baiona, Beasain, Orio, Oiartzun, Gernika-Lumo, Azkoitia and Azpeitia.
- Those with less Basque-speaking inhabitants, but where the proportion of Basque speakers has

risen, applying to three municipalities. This has happened due to loss of population, as in Forua, Iurreta and Eibar.

- Those where both the number and proportion of Basque speakers have fallen. In figures, the main municipalities in this group are Maule-Lexarre, Bermeo, Arrasate, Biarritz and Ondarroa.

Therefore, both the number and proportion of Basque speakers have risen in almost all of the periphery of the part of the Basque Country within Spain. In the central areas of Bizkaia and Gipuzkoa and in Lapurdi, there are more Basque speakers but they have declined in proportional terms, while in Basse Navarre and Zuberoa there have been losses at both levels.

● Variation in the number and proportion of Basque speakers. 2001-2021. By municipality\*



There are 150 municipalities where the number of Basque speakers grew, but fell in proportional terms, in all cases as a consequence of rising population.

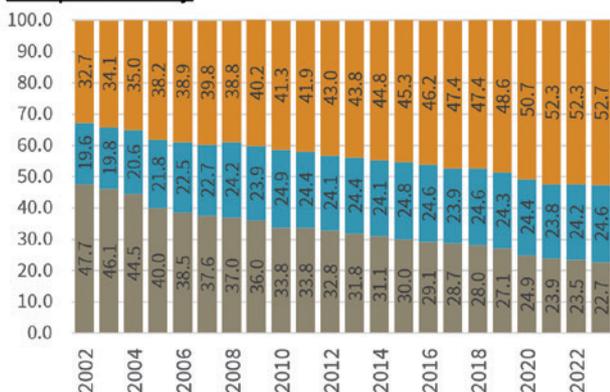
### 3.2 EDUCATIONAL LEVEL OF THE POPULATION

Analysing the educational level of the population from 25 to 64 years old in the Basque Country, the fall in the number of people without education or with education below secondary level stands out, both in the Basque Country and in the 27 European Union states. In the Basque Country, the percentage of people without education or with education below secondary level was 47.7% in 2002, falling to 22.7% by 2023. Alongside this, the number of people with secondary school qualifications rose from 19.6% to 24.6%, and those with tertiary qualifications rose from 32.7% to 52.7%.

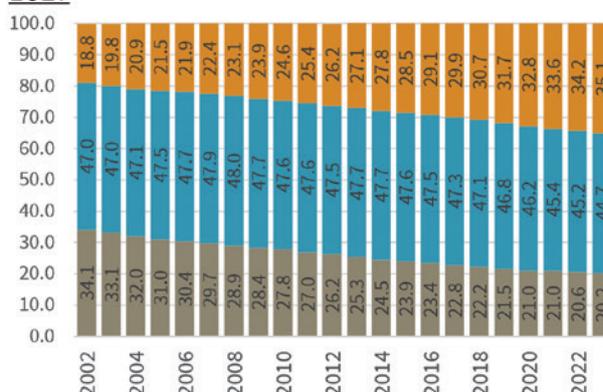
● Educational level of people between 25 and 64 years old. Basque Country & EU27. 2002-2023 (%)

■ Tertiary education ■ Secondary education ■ No education or below secondary education

#### Basque Country



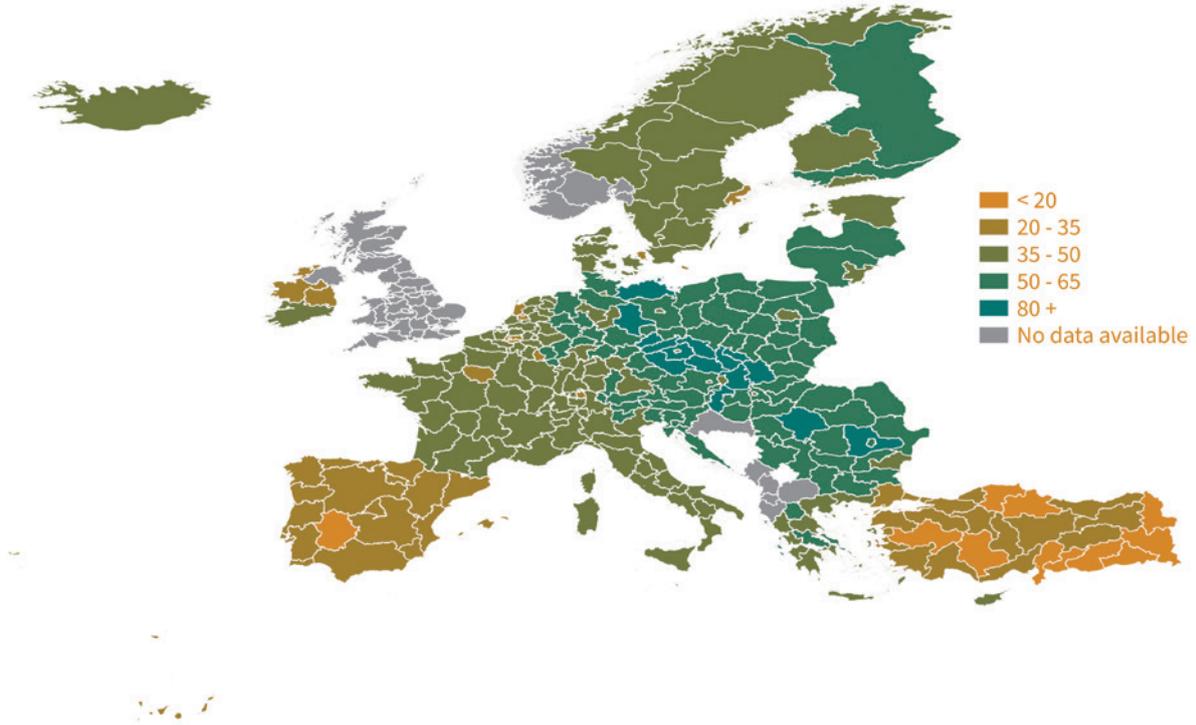
#### EU27



In comparison, across the 27 states of the European Union, the proportion of people with no education or education below secondary level came to 20.2%, that of people with secondary education stood at 44.7%

and those with tertiary education made up 35.1%. Thus, in comparison with other European regions, the Basque Country was above average in tertiary education, and among states only Ireland was ahead, at 54.5%.

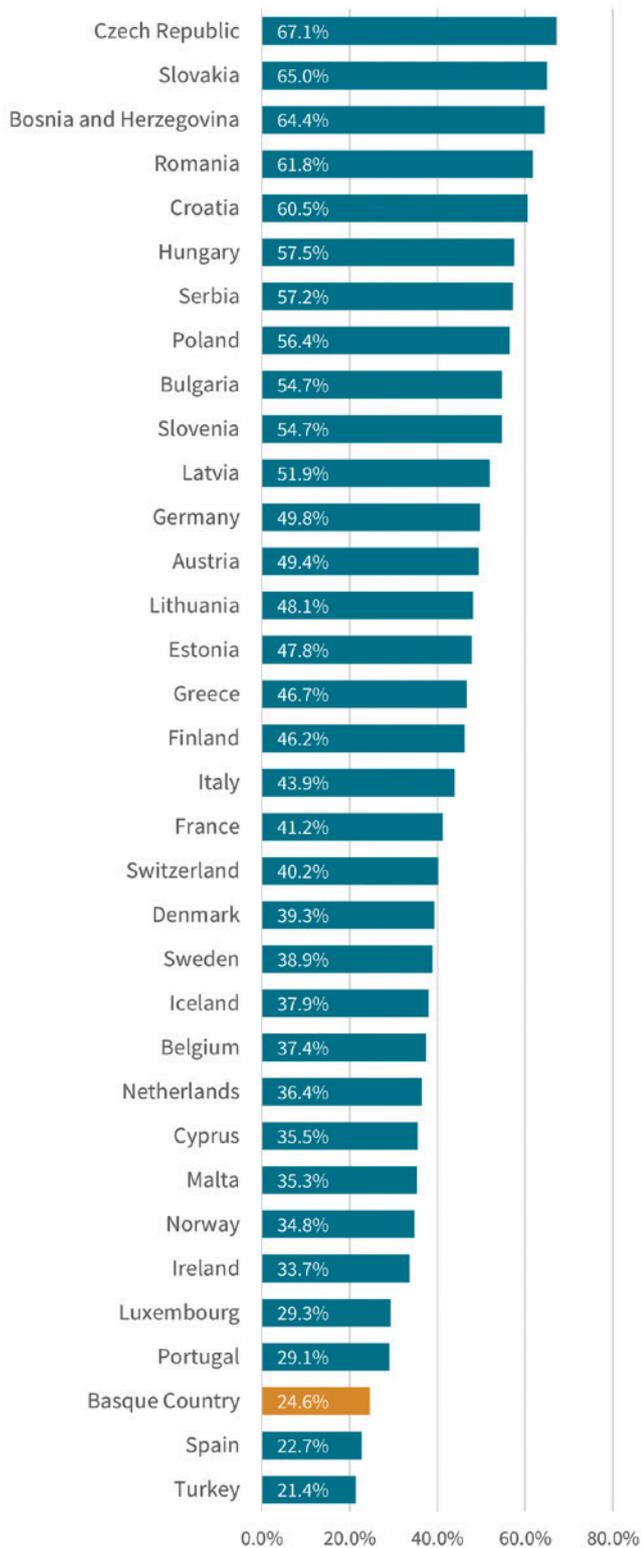
● Secondary education among people between 25 and 64 years old. (%) Basque Country & European regions. 2023



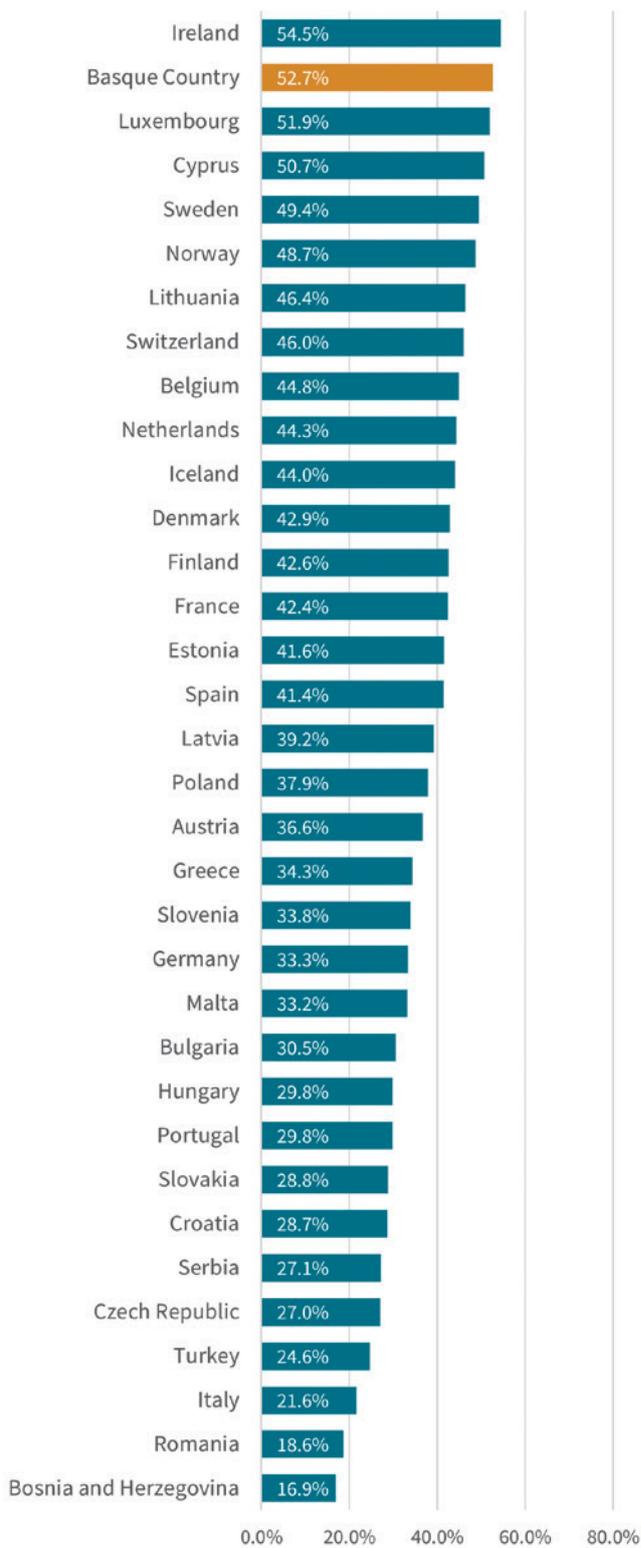
● Tertiary education among people between 25 and 64 years old. (%) Basque Country & European regions. 2023



Secondary education. Basque Country & European states. 2023



Tertiary education. Basque Country & European states. 2023



### 3.3

## CITIZEN PARTICIPATION IN THE LABOUR MARKET

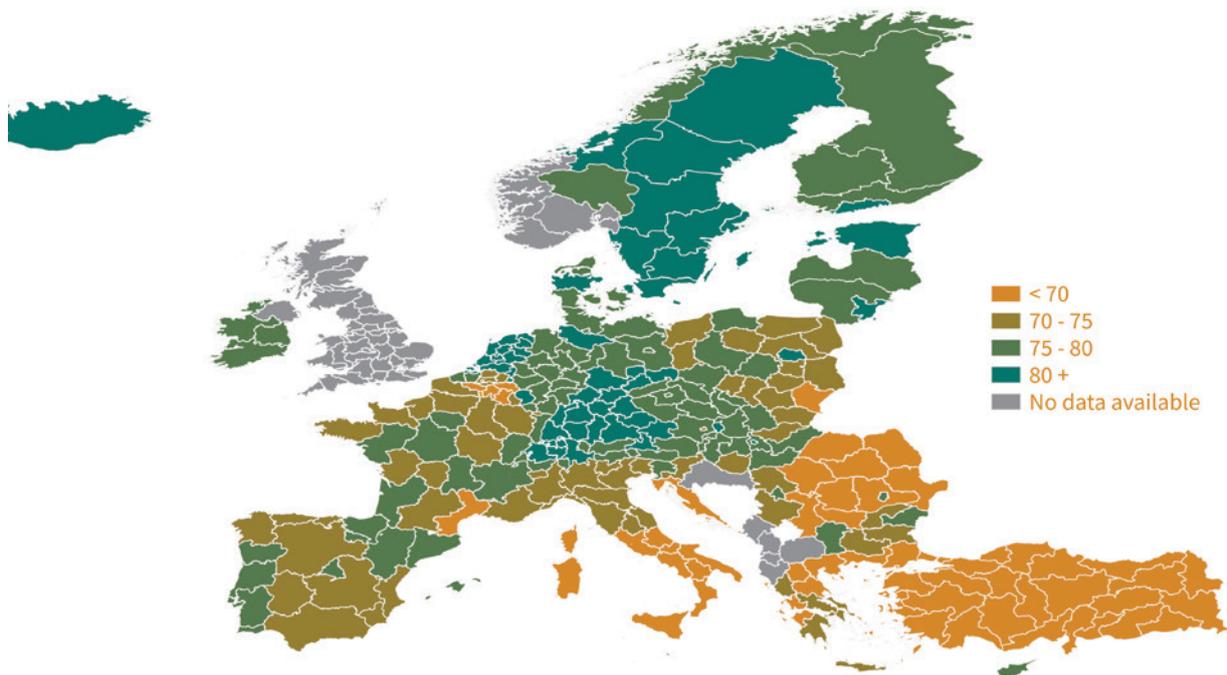
### Activity rate from 15 to 64 years old:

The activity rate in the Basque Country was 75.7% in 2023, while the average for the 27 European Union

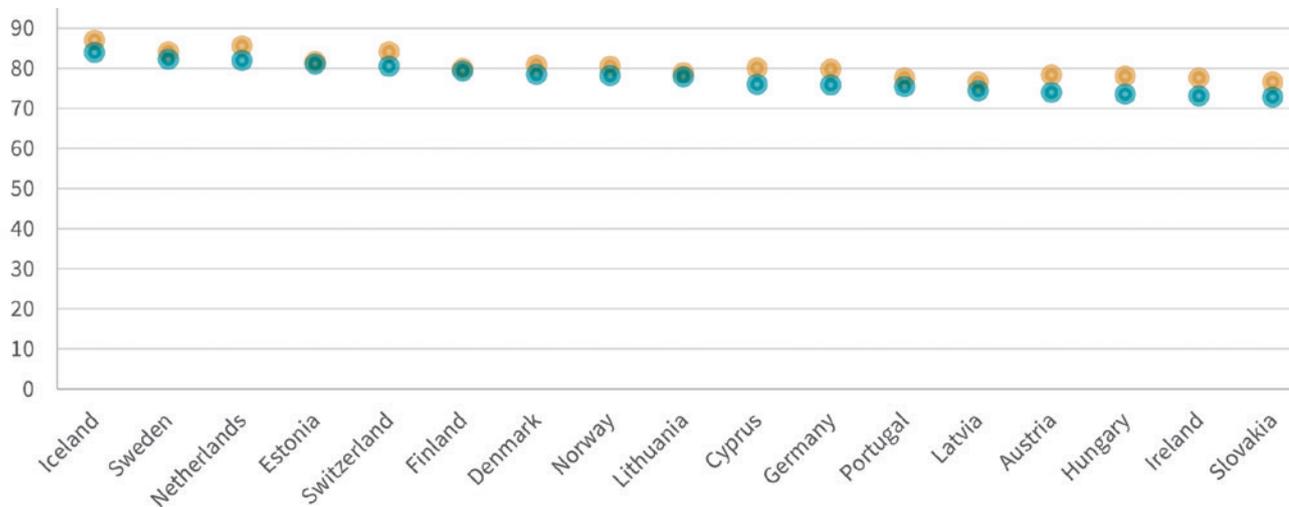
member states was 75%. The regions of Germany have high rates of participation in the labour market, all over 81.0%. However, in several European countries, regions of Turkey, for example, have low rates of participation in the labour market, at around 62.0%.

According to 2023 figures, among all the European regions, the ones with the highest rates of participation in the labour market are in Switzerland and the Netherlands, with values over 80%. For example, Lucerne, Basel and Berne in Switzerland and North Holland, Utrecht and Gelderland in the Netherlands.

● Overall activity rate between 15 and 64 years old. Basque Country & European regions. 2023



● Overall activity rate and women's activity rate. Basque Country & European states. 2023



At the lower end are the Turkish regions (Marmara, Cilicia, Sakarya, Kocaeli, Düzce, Bolu and Zonguldak) at between 52% and 45%, and Guadeloupe in France, at 51%.

The Basque Country is in between.

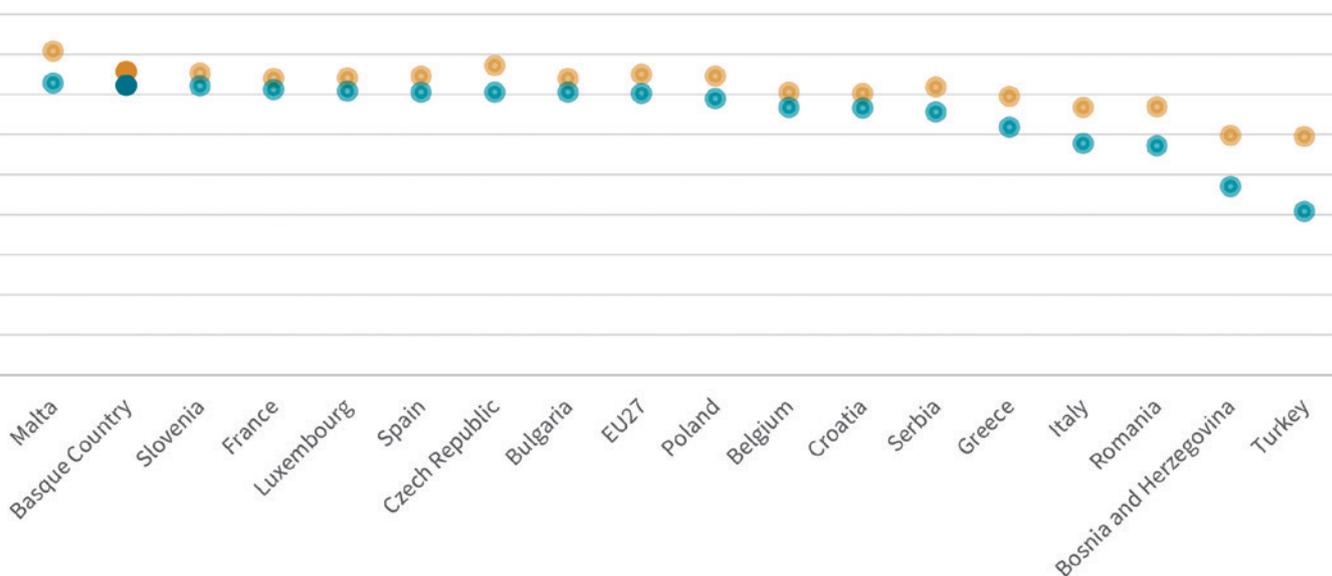
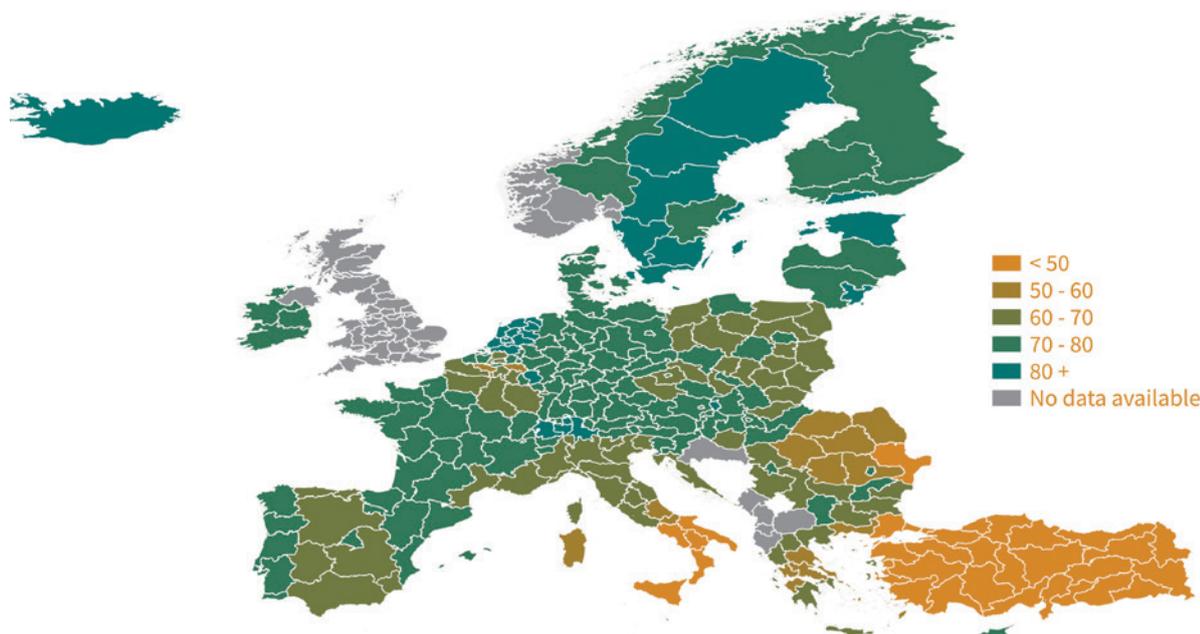
The rate of women participating in the labour force, at 72.3% in the Basque Country, is higher than the European average (70.2%).

It should be pointed out that the proportion of women in work is lower than the overall rate throughout Europe. There is only one region where more women work:

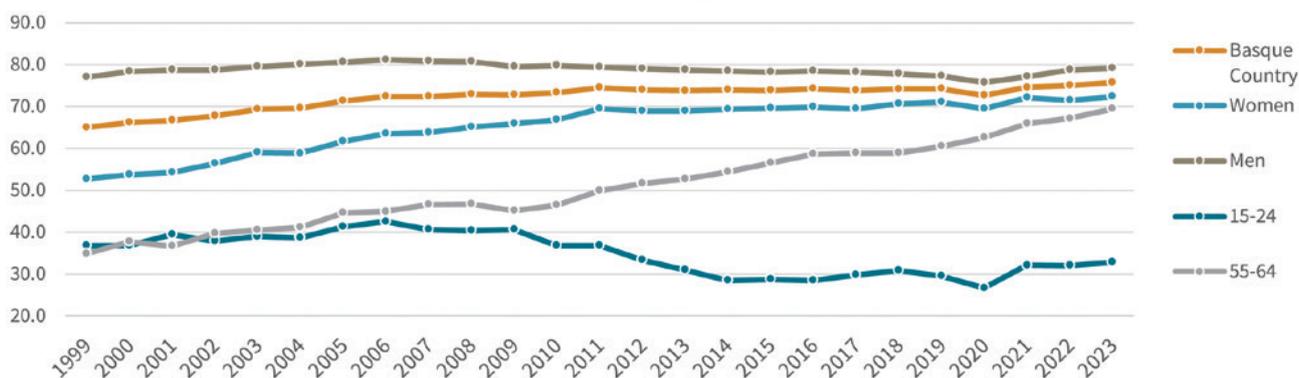
Kymenlaakso in Finland. On the other hand, the following regions have similar rates: Southern France, Bratislava in Slovakia, Uusimaa in Finland and Vilna in Lithuania. The above-mentioned pattern is repeated in the rest. In the case of the Basque Country, the difference is 3.4 points, so there are 88 regions with a smaller difference in the two rates, and 190 with a bigger one.

Moving to state level, Denmark, Switzerland and Iceland have higher overall rates of participation in the labour force, over 80%, as well as higher female participation. Iceland has the highest rate of women in work, at 83.9%.

● Women’s activity rate, between 15 and 64 years old. Basque Country & European regions. 2023



Overall activity rate, by different variables. Basque Country. 1999-2023



Turkey and Bosnia-Herzegovina, however, have low rates of participation in the labour force, both overall (59.5% and 59.8% respectively) and among women in particular (40.8% and 47%).

The Basque Country is in between on both indicators.

The general activity rate has risen in the last twenty years in comparison with the average across the 27 EU member states. In 2002 participation in the labour force in the Basque Country stood at 67.7%, and by 2023 had reached 75.7%. Despite the increase from 67.7% to 75.0% across the European Union, the Basque Country has exceeded the European average, and at the same time is achieving greater equality between women and men. The rate of female participation in the labour force has risen from 52.7% to 72.3%, while that for men has gone from 77.1% to 79.2%. The Basque Country has therefore managed to reduce gender inequality, but the difference between men and women is still significant.

With regard to demographic variables, participation by young people from 15 to 24 years old in the labour force fell from 36.8% to 32.9%, making clear the serious difficulties they face in entering the workforce, or a delay in entering it. On the other hand, the rate of people from 55 to 64 years old in work rose from 34.9% to 69.4%, indicating a significant increase in participation.

### 3.4 EMPLOYMENT RATE

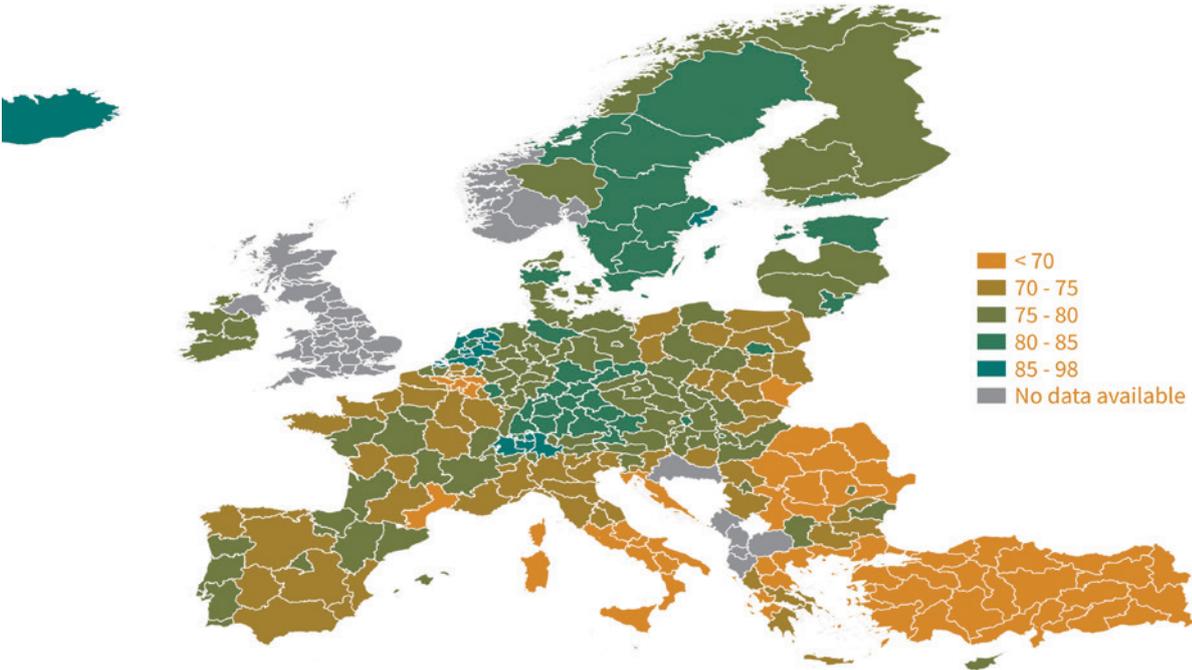
Within the framework of the activity rate, the employment rate shows similar trends. According to figures from 2023, the Basque Country has a high employment rate, at 75.7% of the population between 15 and 64 years old, exceeding the EU27 average (75.0%). The average employment rate across the 27 European Union member states has been rising since 2002, though the Basque Country has always recorded a higher employment rate. In 2005, both were around 71%, and since then the Basque Country has pulled ahead. The female employment rate also stands at 72.3%, above the European Union average (70.2%).

Compared with Northern European countries, employment rates in the Basque Country are lower; Iceland (86.9%), the Netherlands (85.5%) and Switzerland (84.1%) have the highest employment rates. Moreover, participation by women in these countries is significant, and even through the women’s employment rate in the Basque Country is 72.3%, comparable to the European average, it is about ten points lower than the average in these countries.

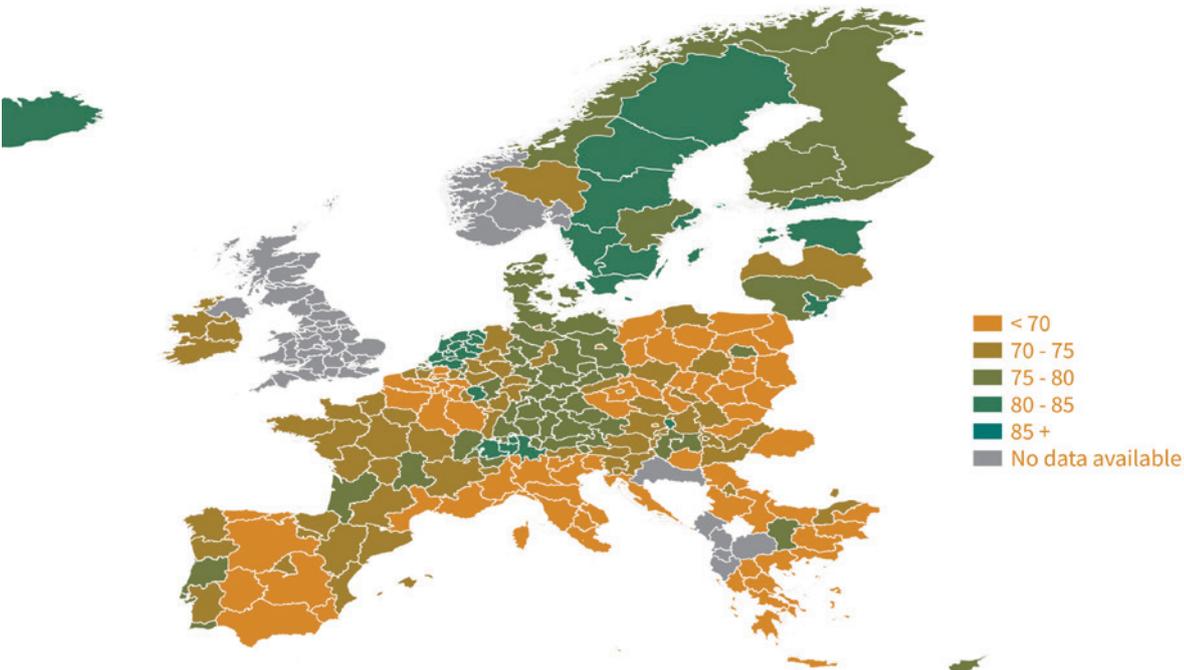
In comparison with the countries of the south and east of Europe, employment data in the Basque Country are very different, especially in the area of women’s employment.

In the Basque Country in 2002, the difference between the employment rates of women and men was obvious; men had a rate of 78.8% and women of 56.4%, a difference of nearly 22 points. Over the years this difference has shrunk. Nevertheless, in 2023 the difference between the employment rates of men and women is still 6.9 points.

● Overall employment rate, between 15 & 64 years old. Basque Country & European regions. 2023



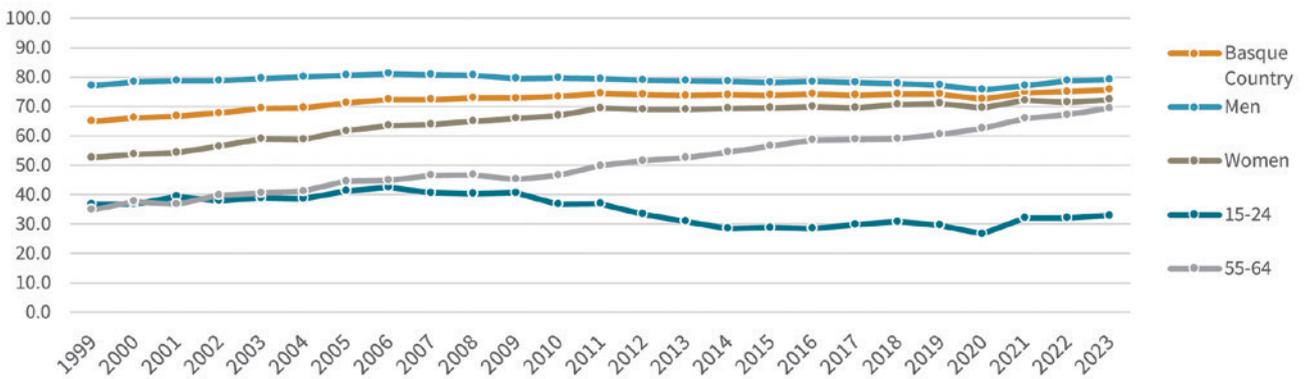
● Women's employment rate, between 15 & 64 years old. Basque Country & European regions. 2023



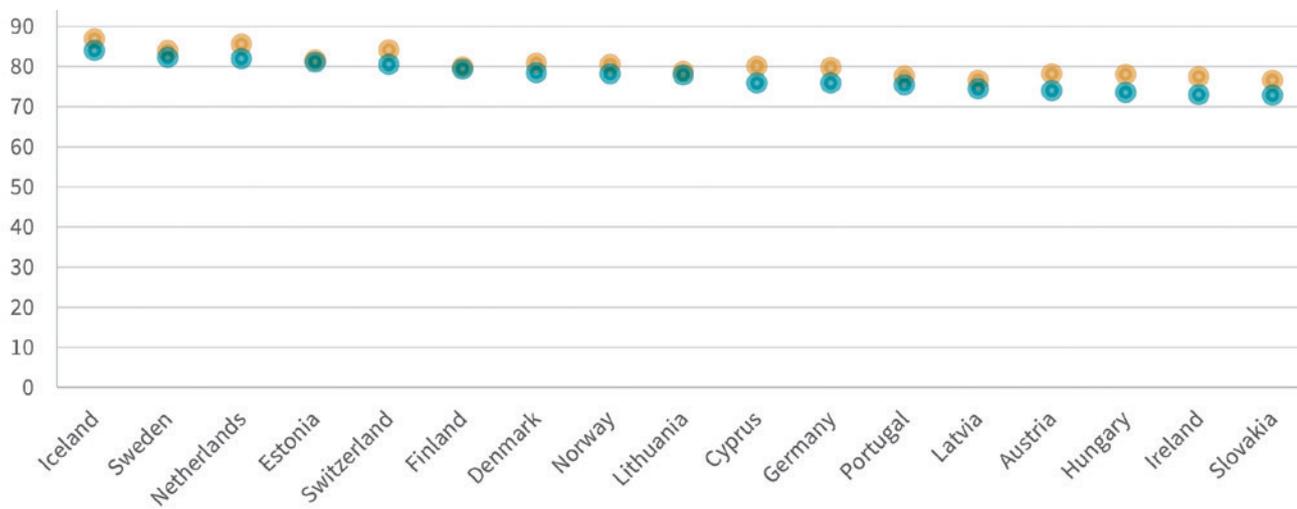
The employment rate among young people from 15 to 24 years old in the Basque Country stood at 32.9% in 2023, though this sector has fluctuated a lot in recent years. In the crisis of 2008 the rate was 40.6%, but in the last decade it has fallen significantly, reaching 26.6% in 2020.

The employment rate for the group from 55 to 64 years old has risen considerably in the Basque Country, from 39.7% in 2002 to 69.4% in 2023.

● Overall employment rate, by different variables. Basque Country. 1999-2023



● Overall employment rate and women's employment rate. Basque Country & European states. 2023

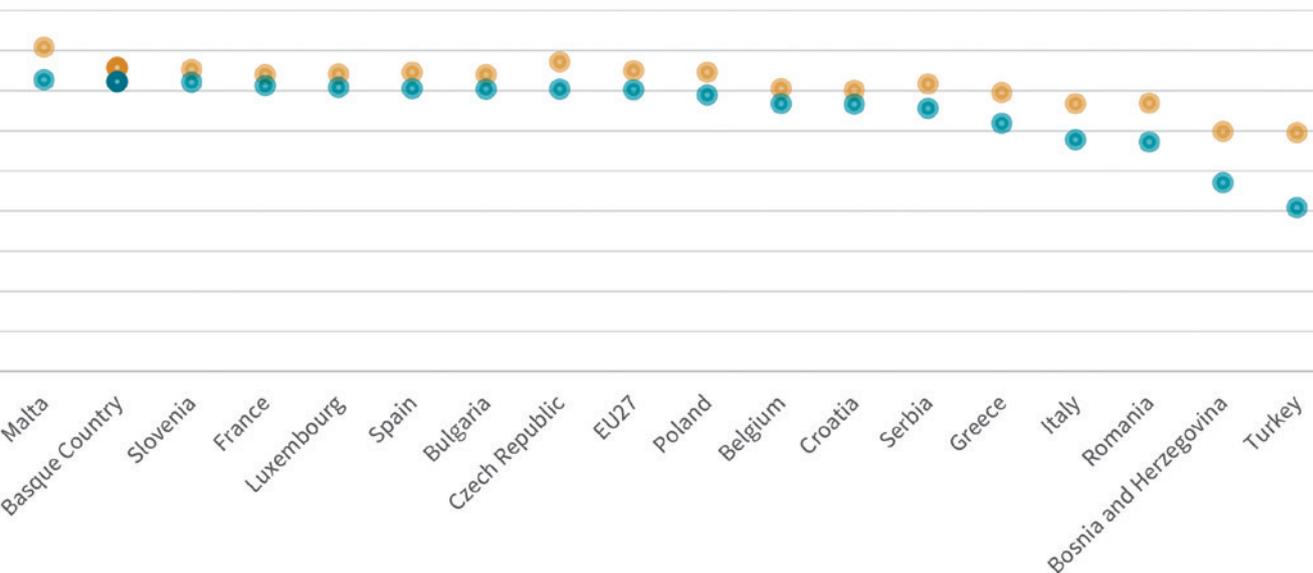
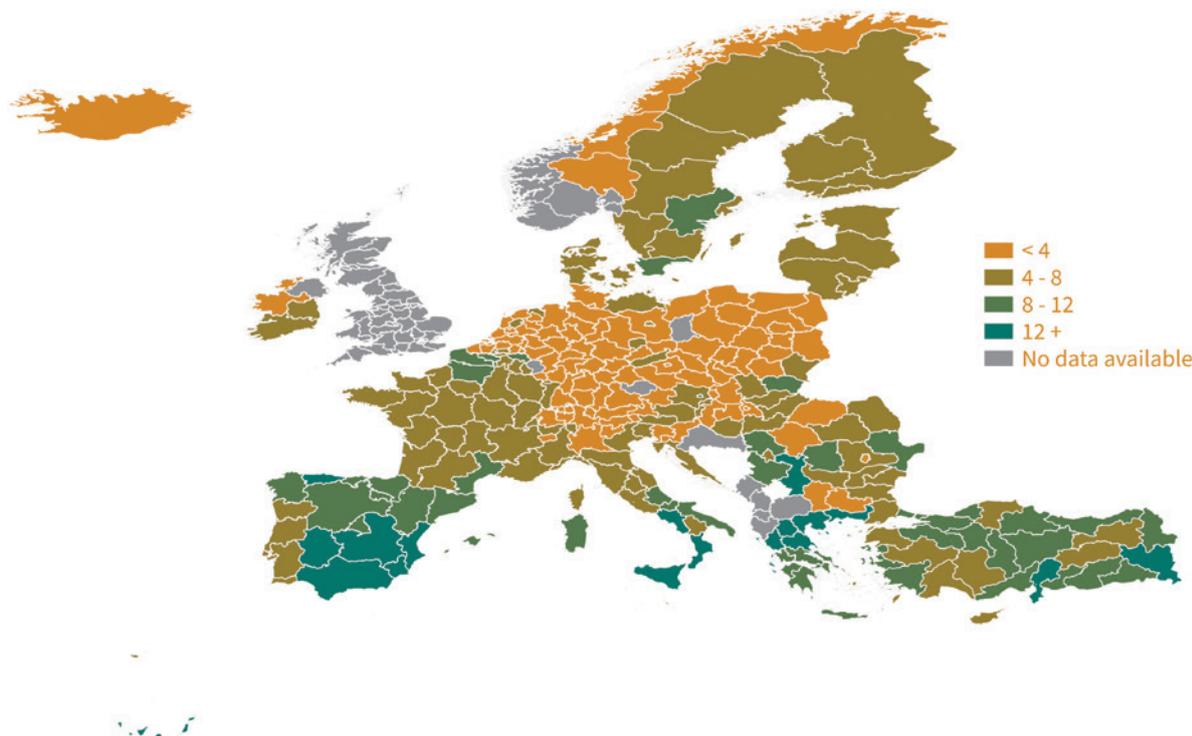


### 3.5 UNEMPLOYMENT RATE

Analysis of unemployment rates in the Basque Country and in Europe reveals some relevant figures, both in the overall unemployment rate and among young people.

Taking the figures for 2023, the overall unemployment rate in the Basque Country was around 8.1%, above the EU27 average (6.1%) and, taking into account all the regions, this places the Basque Country among the relatively higher unemployment rates. Leaving aside Ceuta (30%) and Melilla (26.6%), we have the following regions, with unemployment rates of 17-19%: Provence-Alpes-Côte d’Azur, Île de France including Paris, the Van

● Unemployment rate (from 15 years old). Basque Country & European regions 2023



● Female employment rate

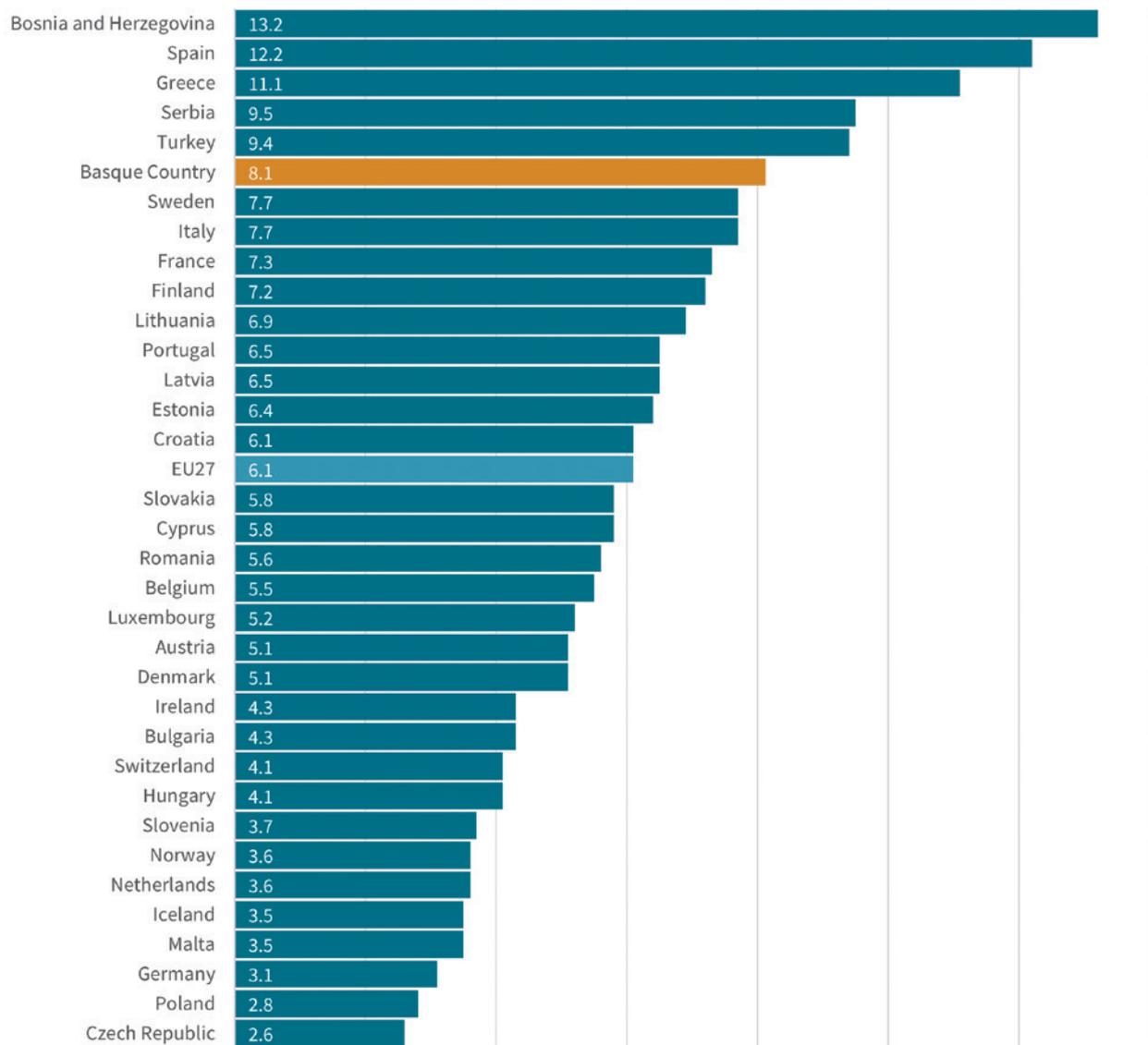
region of Turkey, Andalusia and Extremadura in Spain and the Campania region in Italy. In percentage terms, the Basque Country is further from them than from those with the lowest unemployment rates, but has more comarcas (counties) with lower rates than with higher ones. The lowest unemployment rates are found in Poland, the Czech Republic and Germany: central Moravia, Trier, Pock, West Warsaw and Southwest.

By states, Bosnia-Herzegovina (13.2%), Spain (12.2%) and Greece (11.1%) are the countries with the highest unemployment. Poland (2.8%), the Czech Republic (2.6%), Germany (3.1%) and Iceland (3.5%) have very low

unemployment rates. The Basque Country is therefore closer to the countries with high unemployment rates than to the countries with low unemployment rates, in this case in terms of both percentages and position.

In the Basque Country, the youth unemployment rate in 2023 (15-24 years old) stood at 23.6%, which is quite high in comparison with other countries in the European Union. The highest youth unemployment rates are found in the following regions of Spain, Greece, Italy and France, where they are over 40%: the cities of Ceuta and Melilla, Western Macedonia, Calabria, Epirus, Sicily, Campania and Guadeloupe. At the opposite end of the scale are those

● Unemployment rate. Basque Country & European states. 2023



of the Czech Republic, Germany and the Netherlands: Southwest Czechia, Overijssel, Stuttgart, Zeeland, Eastern Switzerland, Central Switzerland and the central province of the Czech Republic, all below 6%. By states, the order is almost the same: with the highest youth unemployment, over 25%, Bosnia-Herzegovina, Spain, Greece and Serbia (followed by the Basque Country), and with the lowest, under 9%, Iceland, the Czech Republic, the Netherlands, Switzerland and Germany.

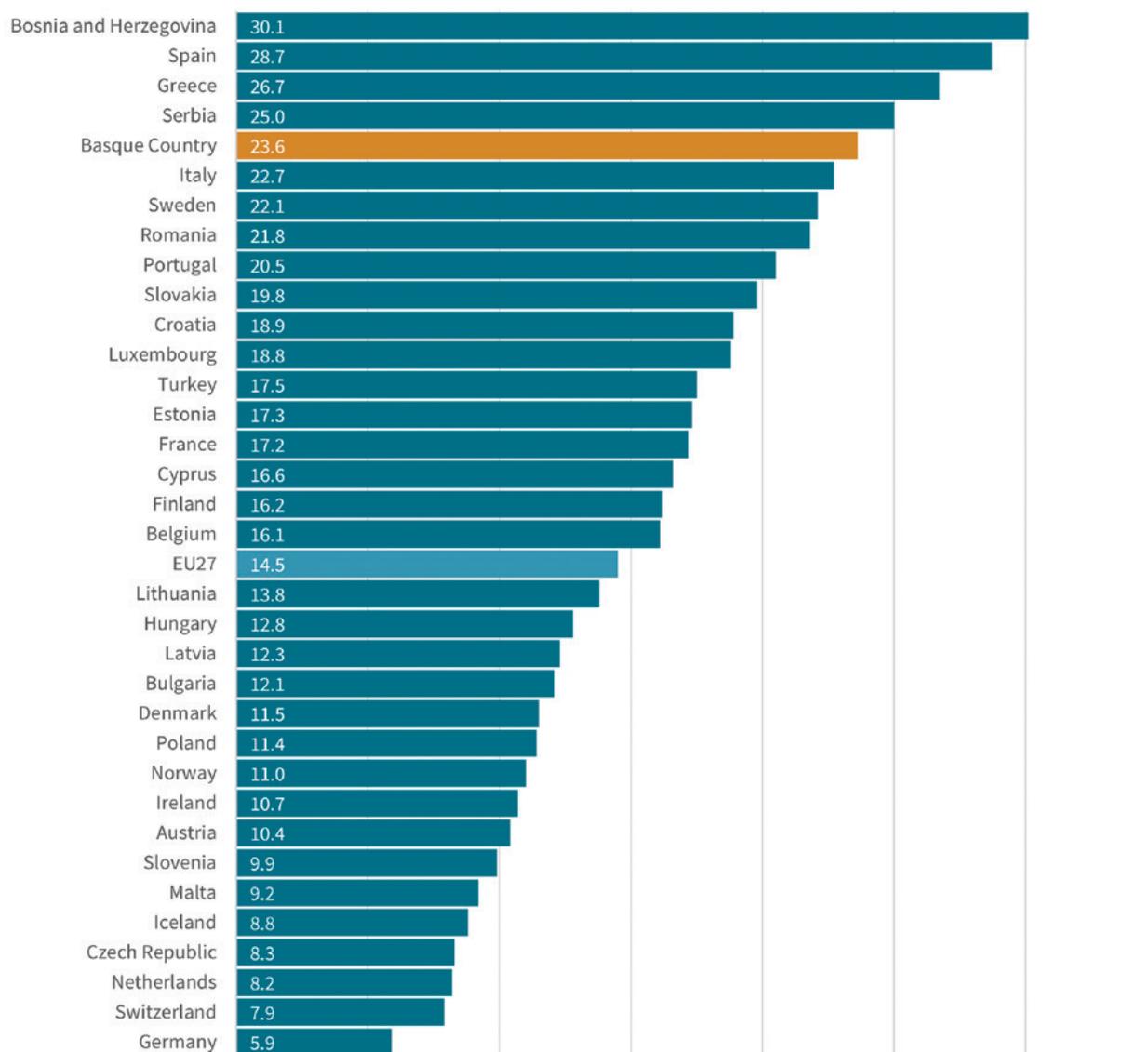
at 15.2% and 16.2% respectively. In 2020, during the economic crisis caused by the COVID-19 pandemic, the overall unemployment rate rose in 2021 to 10.1%, but then began to fall.

The age bracket from 15 to 24 years old has always had the highest unemployment rate, at 26.6% in 1999. Though it fell to 23.6% in 2023, the rate remains high in relation to the figures in Europe.

Analysis of the different trends and variable in the Basque Country from 1999 to 2023, the overall unemployment rate fell from 12.6% to 8.1%. The highest unemployment rates were recorded in 2012 and 2013,

In 2012, the age group between 55 and 64 years old recorded 9.8%, the highest level in this series, falling to 8.0% in 2023, standing at a mid-point in the whole series.

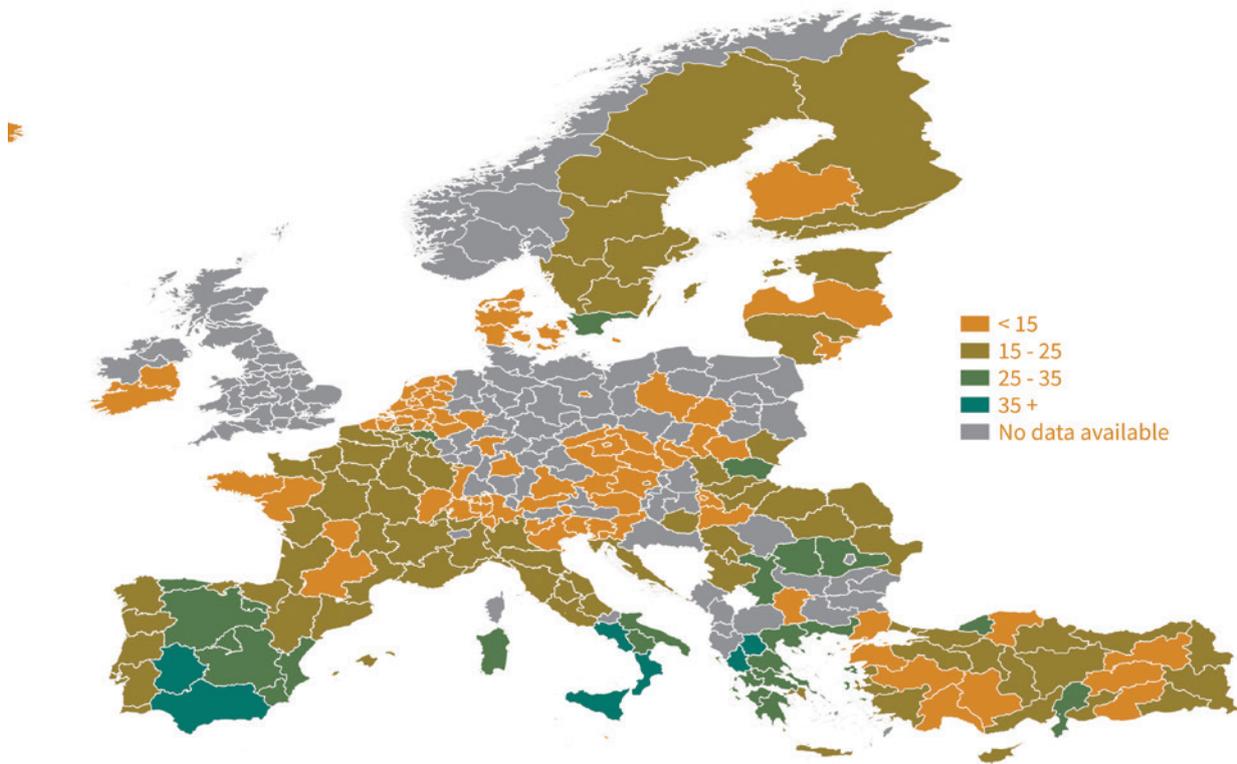
● Youth unemployment rate (15-24). Basque Country & European states. 2023



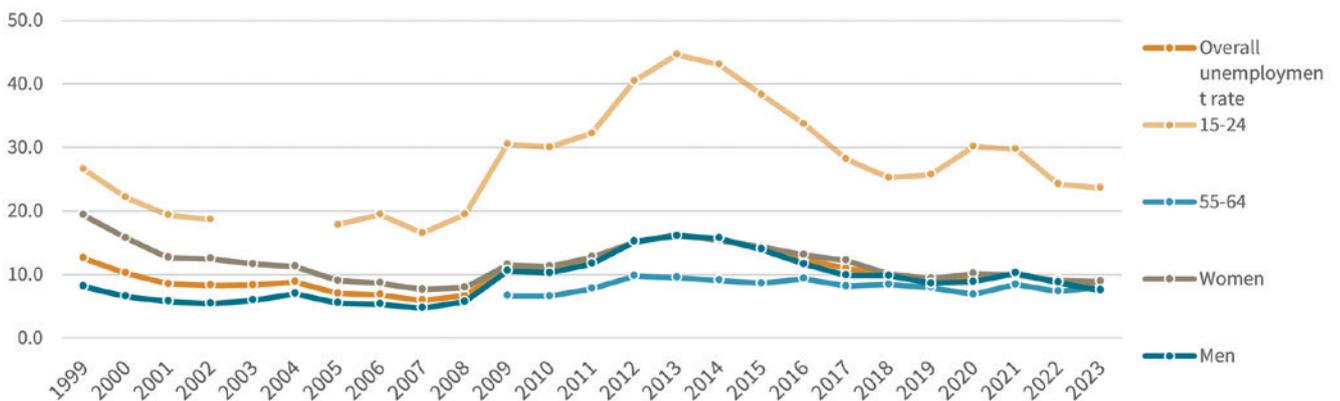
The overall women's unemployment rate fell from 19.4% in 1999 to 8.9% in 2023. There was a significant fall in the overall women's unemployment rate, especially in 2013, reaching 16.3%. The men's unemployment rate fell from 8.1% in 1999 to 7.5% in 2023, with many fluctuations in between; the worst figure in recent times was 16.1% in 2013.

Comparison of the unemployment rates for men and women shows that the differences between them shrank considerably in the first decade of the century, from over 11 points in 1999 it fell to a single point in 2009. After this, due to the financial crisis and COVID, the figures rose and fell, but the difference between the two did not exceed 2.3 points, and on occasion the women's unemployment rate was actually lower.

Youth unemployment rate (15-24 years old). Basque Country & European regions 2023



Unemployment rate by different variables. In total, women, men, young people, old people. Basque Country 1999-2023



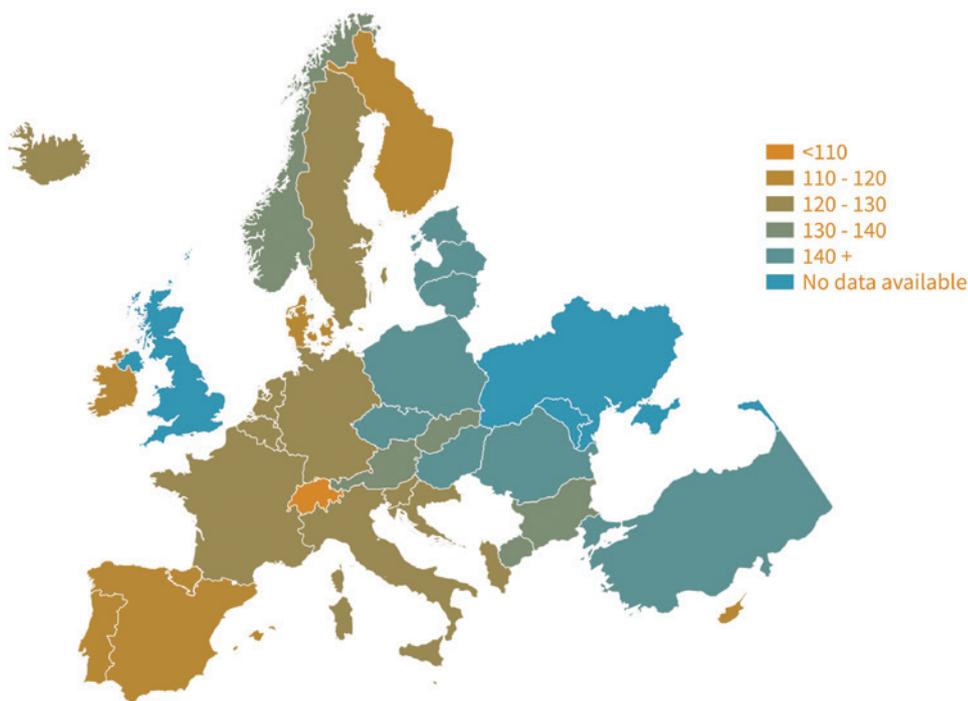
### 3.6 CONSUMER PRICE TRENDS

In 2023, the Consumer Price Index (CPI) in the Basque Country stood at approximately 119.9. In comparison with the EU27 average (126.38), the Basque Country is at a fairly low level in price terms. In analysis of regional differences, some European countries should be taken into account: Turkey (570.9), Hungary (160.6), Estonia and Lithuania (149.5) have a high CPI, above the Basque Country. In contrast, however, the figures for Switzerland (106.1), Cyprus (114.5) and Greece (106.1)

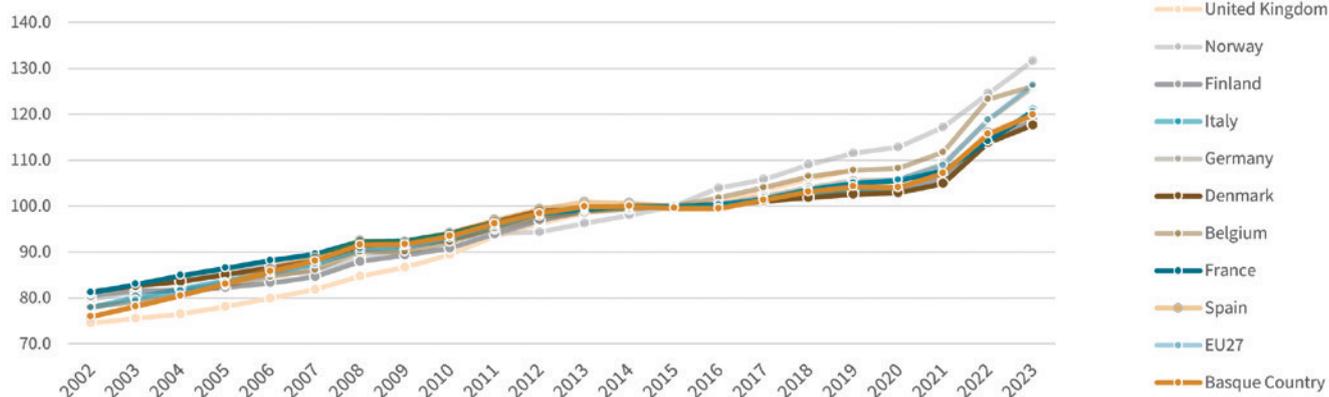
were significantly lower in 2023. This places the Basque Country in an intermediate position.

A look at the trend in the CPI in the Basque Country from 2002 to 2023 shows that the consumer price index did not stop rising, from 75.9 to 119.9, representing an increase of 58.05%. Also, the biggest states, Spain, France, Belgium and Germany, also recorded a notable increase in the CPI, with the Spanish rate rising from 75.9 to 119.9, and the French one from 81.2 to 120.5. The CPI in Slovenia, Denmark and Norway also rose, from 79.7 to 131.6. Over this period, Denmark recorded the smallest increase (36.4) and Norway the largest (51.9).

Consumer price index (CPI). Basque Country & European states. 2023



Consumer price index (CPI). Trend. Basque Country & main European states. 2002-2023

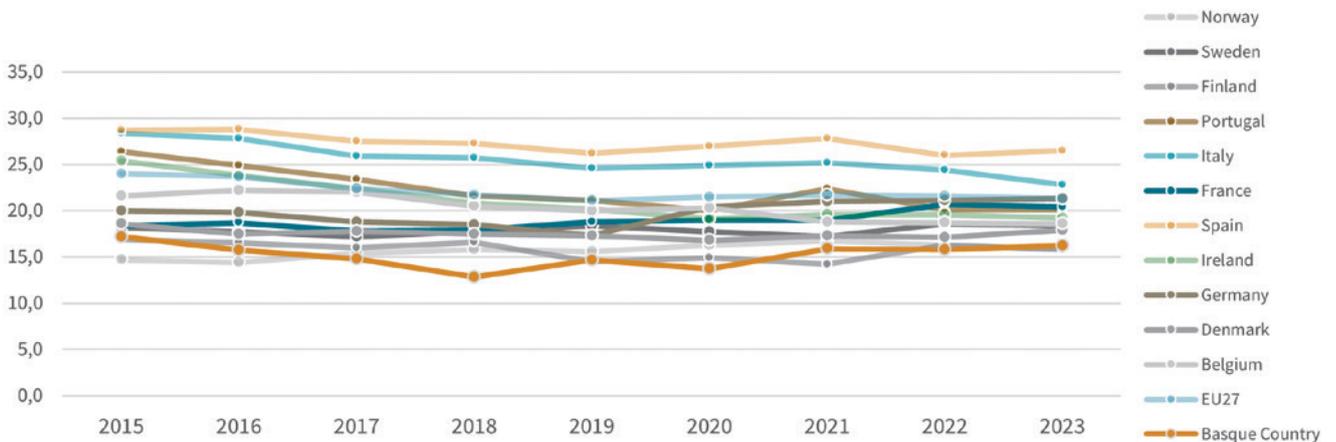


### 3.7 RISK OF POVERTY

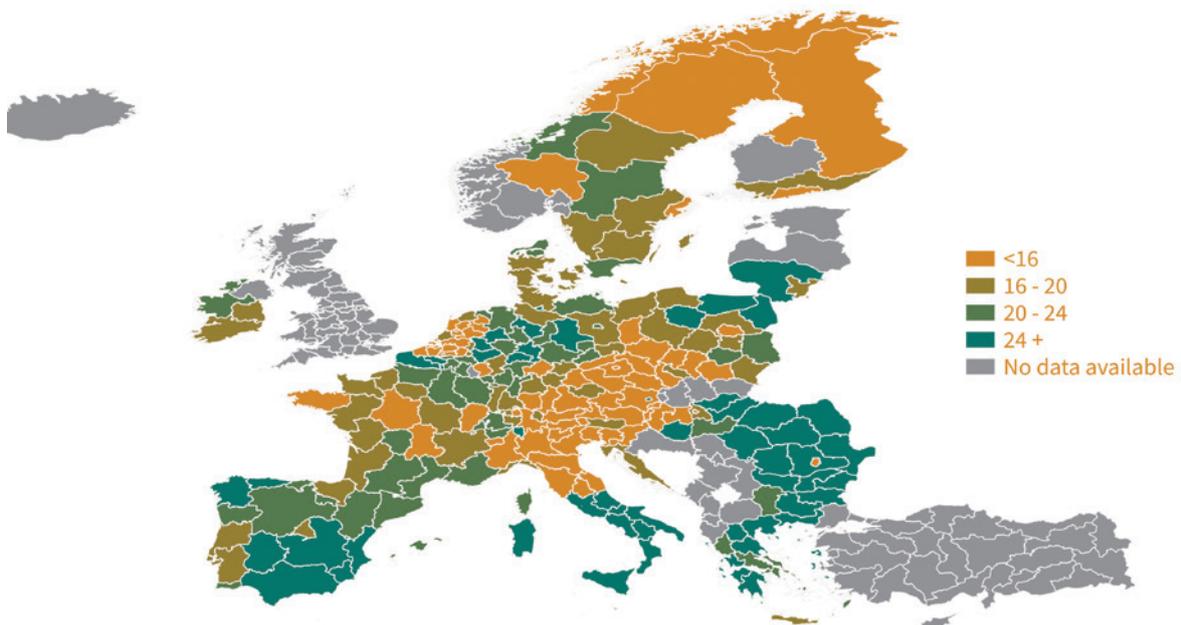
In terms of poverty, the Basque Country had a risk rate of 16.2% in 2023. The trend in the risk of poverty in the Basque Country, according to figures from 2015 to 2023: the rate in 2015 was 17.2%, falling to 12.8% in 2018 and rising slightly from 2019 to reach 16.2% in 2023.

With regard to the European regions, according to figures from 2023, the three regions with the highest risk of poverty were Guyana (with a rate of 60.3%), Calabria in Italy (with 48.6%) and Southeast Romania (with 45.3%). The three regions with the lowest risk of poverty were: South Tyrol (in Italy) with a rate of 5.8%, Emilia Romagna (also in Italy) with 7.4% and Warsaw (Poland) at 8.9%. The Basque Country, with a rate of risk of poverty of 16.2%, is far from the highest risk. Nevertheless, in comparison with the regions at the lowest risk of poverty, it still has a long way to go.

Risk of poverty & social exclusion (% of population). Basque Country & main European states. 2015-2023

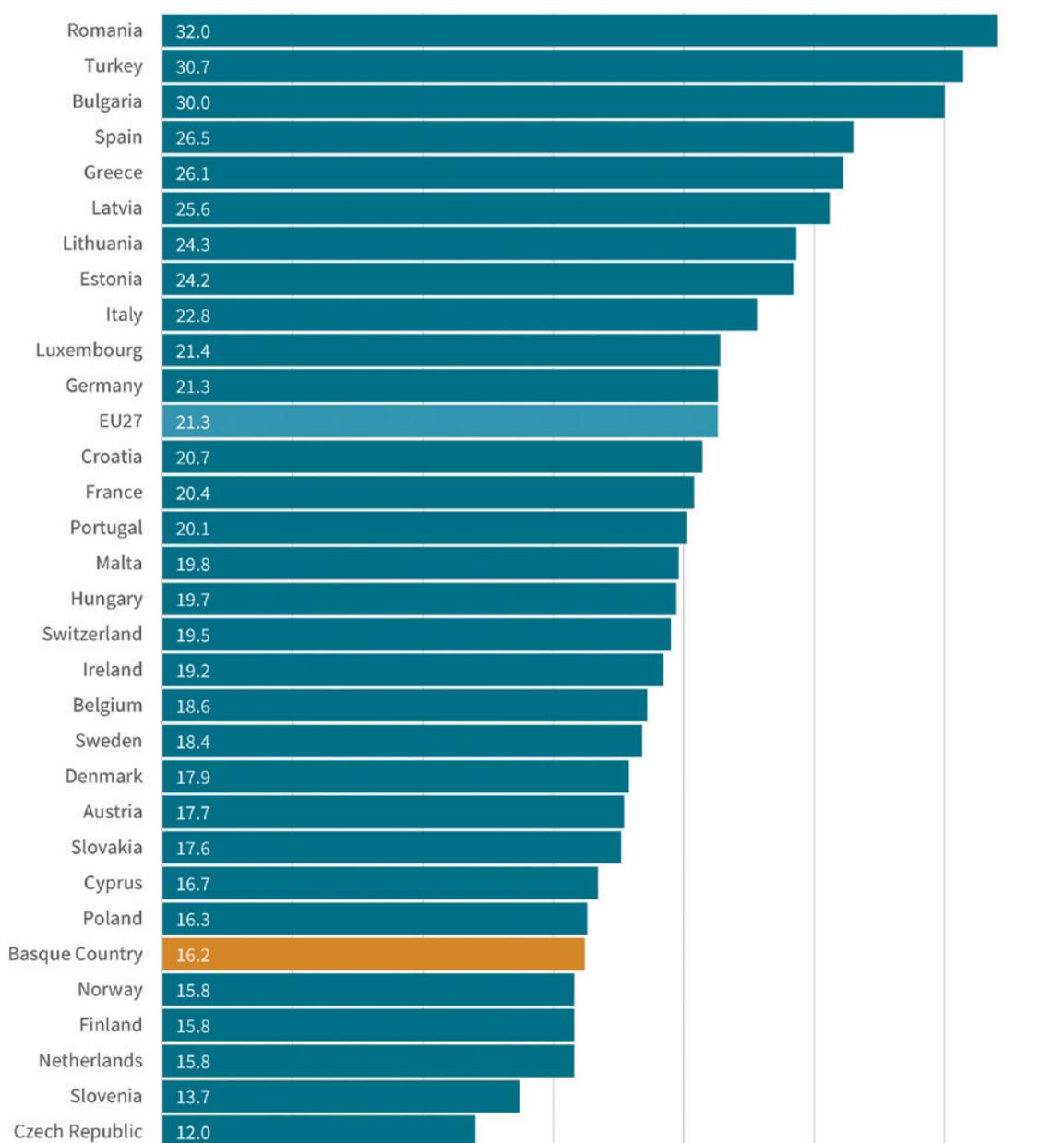


Risk of poverty & social exclusion (% of population). Basque Country & European regions. 2023



In comparison with states, the average risk of poverty across the European Union (EU27) is still higher than in the Basque Country, varying between 24% in 2015 and 21.3% in 2023. Spain, which began the year 2023 at 28.7%, falling to 26.5%, remains one of the European countries with the highest risk of poverty. At the other end of the scale are Finland and Norway, at 15.8% in 2023.

● Risk of poverty & social exclusion (% of population). Basque Country & European states. 2023

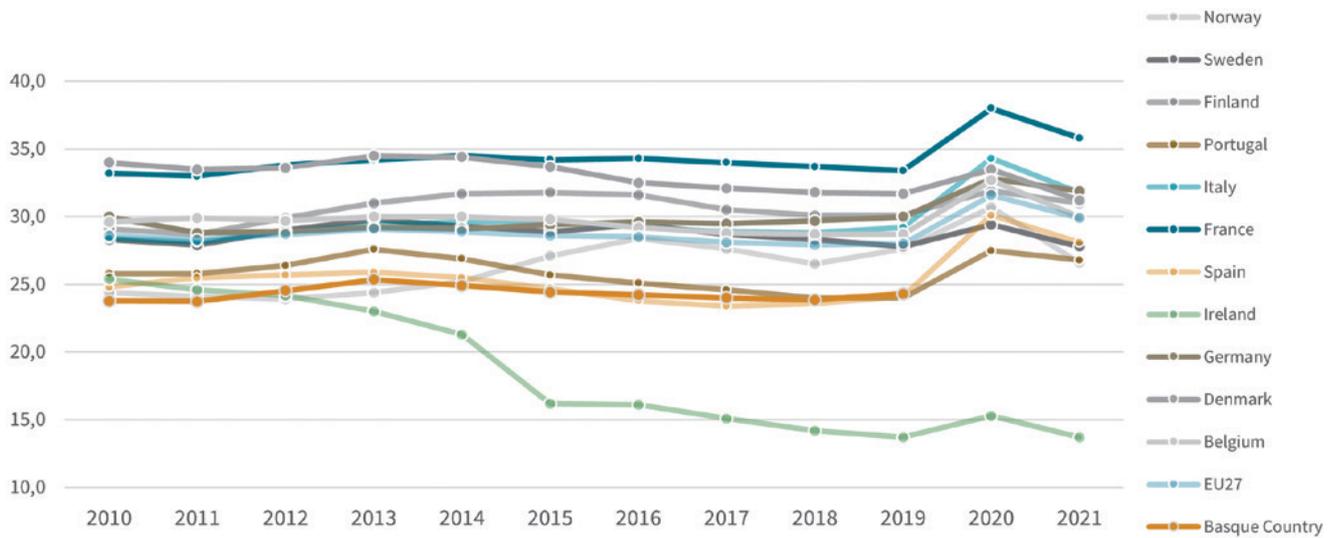


### 3.8 INVESTMENT IN SOCIAL PROTECTION

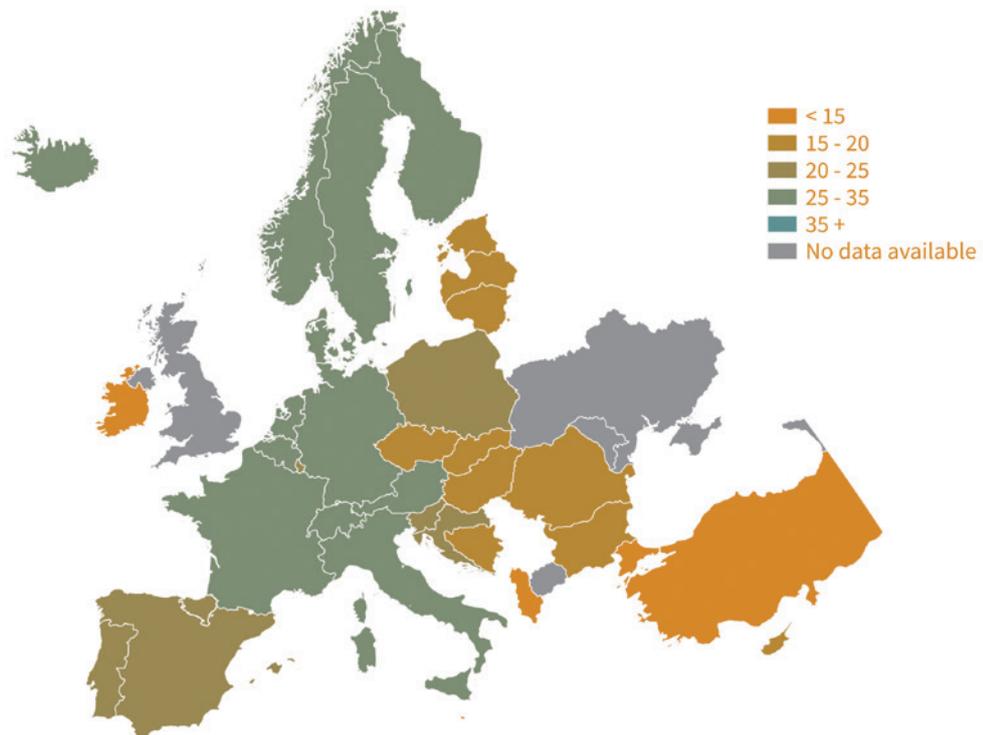
The percentage of GDP assigned to social protection in the Basque Country remained steady between 2010 and 2019, going from 23.8% to 24.3%. However, both the average for the European Union (28.0%) and those for countries like Denmark (31.7%) and Germany

(30.0%) are above that of the Basque Country. In 2019 the Basque Country recorded a rate of 24.3%, a similar level to Spain (24.1%) and Greece (25.4%), but far from the average for the European Union and countries like France (33.4%) and Finland (30.1%).

● Spending on social protection as % of GDP. Basque Country & some European states. 2010-2019



● Spending on social protection as % of GDP. Basque Country & European states. 2019



In terms of numbers and proportions of Basque speakers, the last two decades have seen gains in numbers and proportions in nearly all of the periphery of the Spanish Basque Country. In the central areas of Bizkaia and Gipuzkoa and in Lapurdi, there are more Basque speakers but they have declined in proportional terms, while in Basse Navarre and Zuberoa there have been losses at both levels.

In the Basque Country, the educational level of the population from 25 to 64 years old rose considerably from 2002 to 2023, with less people with no education or with education below secondary level, and more people completing secondary and tertiary education. The Basque Country exceeds the average educational level of the European Union, with 52.7% of tertiary education, second only to Ireland.

In 2023 the Basque Country recorded an activity rate of 75.7%, above the European average (75.0%). The Swiss and Dutch regions have activity rates above 80%, while some regions of Turkey and French Guadeloupe are lower (51%-52%). The Basque Country is in between.

The women's activity rate is 72.3%, above the European average (70.2%). Like in the Basque Country, the women's employment rate throughout Europe is below the overall rate, with the exception of Kymenlaakso in Finland.

The activity rate in the Basque Country has risen over the last two decades, from 52.7% in 1999 to 75.7% in 2023. The women's rate rose from 36.8% to 72.3%, and the men's rate from 77.1% to 79.2%, so reducing gender inequalities. The youth activity rate, on the other hand, fell from 36.8% to 32.9%, while that for people from 55 to 64 years old rose from 34.9% to 69.4%, with participation by older workers rising.

In 2023 the Basque Country had an employment rate from 15 to 64 years old of 75.7%, higher than the European average (75.0%). It has always stood at a higher level. The women's employment rate stands at 72.3%, above the average for women across the EU27. However, it is lower than employment rates in northern European countries, especially Iceland, the Netherlands and Switzerland. While the gap between women and men has shrunk, it is still 6.9 points. The youth employment rate has varied, and the employment rate for people from 55 to 64 years old has displayed a positive trend.

In terms of unemployment, while the Basque Country is better-off than Spain and Greece, it is above the European average and there are many regions and states in more favourable situations.

From 1999 to 2023, the overall unemployment rate in the Basque Country fell from 12.6% to 8.1%, peaking at 16.2% in 2013.

Looking at unemployment rates in the Basque Country and Europe, the figure of 8.1% in the former in 2023 is above the EU27 average (6.1%) and is among the regions with higher rates; after Ceuta and Melilla, the regions with the highest unemployment rates in Europe are Provence-Alpes-Côte d'Azur, Île de France, Andalusia in Spain and the Campania region in Italy. By states, Bosnia (13.2%), Spain (12.2%) and Greece (11.1%) are the countries with the highest unemployment, while countries like Poland (2.8%), the Czech Republic (2.6%), Germany (3.1%) and Iceland (3.5%) have very low unemployment rates.

The youth unemployment rate (age 15-24) in the Basque Country is 23.6%, similar to the regions with the highest figures in Spain, Greece and Italy; in comparison, the Czech Republic and Germany have an unemployment rate of less than 6%. The youth unemployment rate peaked at 26.6% in 1999 and had fallen to 23.6% by 2023, which is still high in comparison to European figures. The women's unemployment rate fell from 19.4% to 8.9% and that for men from 8.1% to 7.5%, reducing the gender gap.

In general terms, the CPI has risen in the Basque Country and in the main European states. However, the price index in the Basque Country remains lower than the European average, and prices in several European countries, especially in the Balkans and the Baltic states, are higher. However, the trend remains positive, as it has increased in recent years.

The Basque Country had a risk-of-poverty rate of 16.2% in 2023. In 2015 it fell from 17.2% to 12.8%, increasing slightly from 2019 onwards. Among European regions, the three with the highest risk of poverty are Guyana (60.3%), Calabria (48.6%) and Southeast Romania (45.3%), while those with the lowest risk of poverty are South Tyrol (5.8%), Emilia Romana (7.4%) and the capital of Poland, Warsaw (8.9%). The Basque Country is far from having the highest risk, but in comparison with the regions with the lowest risk of poverty, it has room for improvement. The average across the European Union is 21.3%, while in Spain the figure is 26.5%, while Finland and Norway stand at 15.8%.

Between 2010 and 2019, the Basque Country devoted a similar percentage of GDP to spending on social protection, going from 23.8% to 24.3%. However, the European Union average (28%) and those in countries such as Denmark (31.7%) and Germany (30%) are higher than the figures in the Basque Country. In 2019 the Basque Country still had a rate of 24.3%, a similar level to Spain (24.1%) and Greece (25.4%), but far from the average for the European Union and countries like France (33.4%) and Finland (30.1%).





**4**

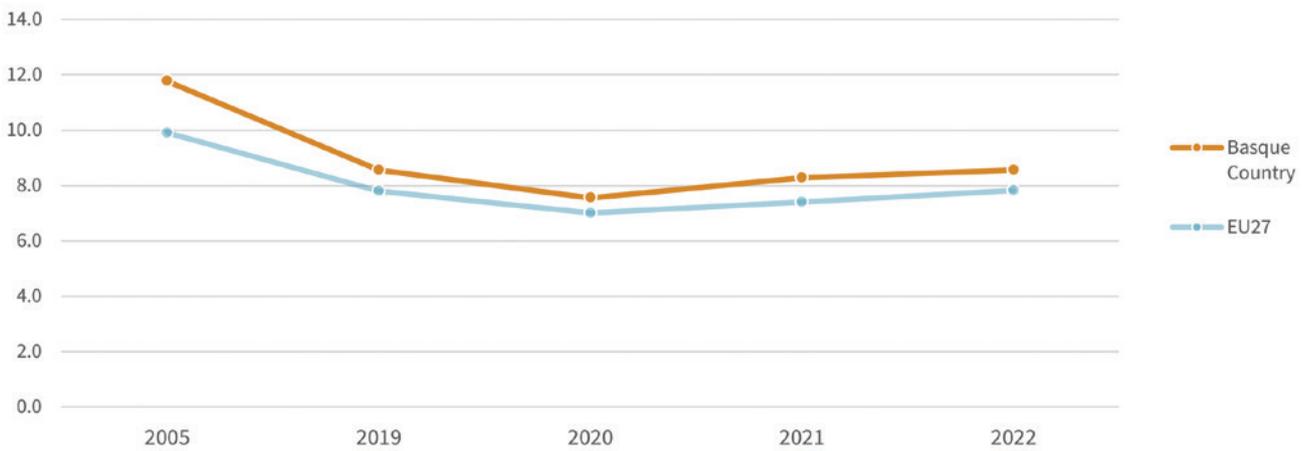
**ENVIRONMENT**

# 4.1 AIR POLLUTION

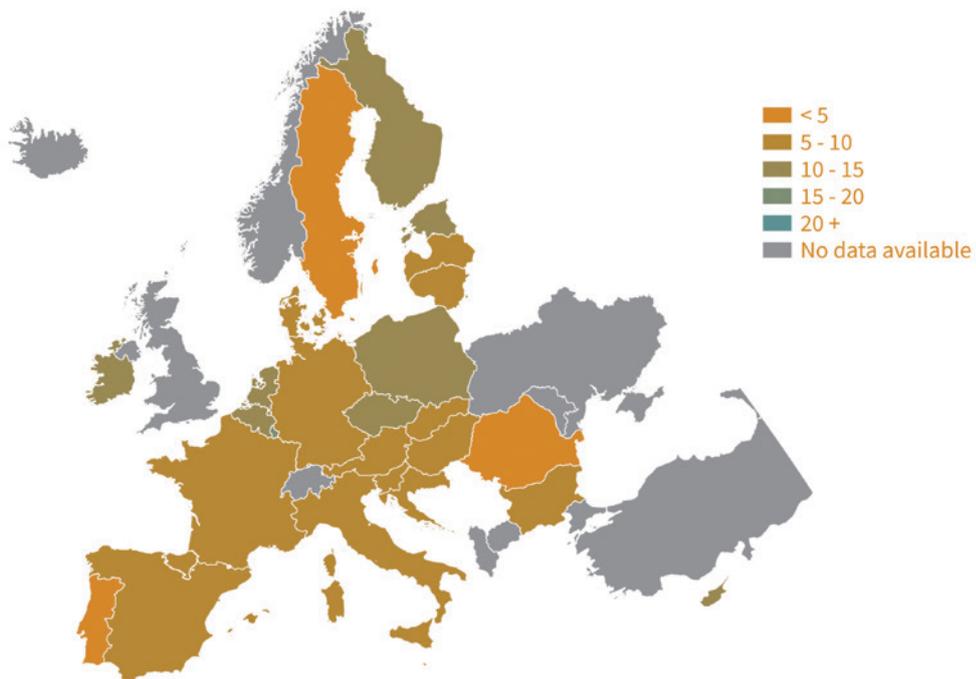
In the Basque Country, greenhouse gas emissions came to 11.8 CO<sub>2</sub>eq(kt) (equivalent to CO<sub>2</sub> in kilotonnes) per inhabitant, but this fell to 8.6 between 2005 and 2022. In relation to the average across the EU27, which fell from 9.9 to 7.8, The Basque Country’s emissions are higher. Over the last four years, apparently due to the pandemic, the lowest levels of emissions per inhabitant were recorded in 2020 (7.5) and 2021 (8.3). In 2022, on the other hand, emissions increased slightly, reaching 8.6 once more in 2019.

In 2022 Estonia (13.0), Ireland (14.7) and Luxembourg (17.2) had the highest emissions per capita. At the opposite end of the scale were Sweden (0.8), Romania (3.8) and Malta (4.7). Compared to European states, the Basque Country, at 8.6, was similar to Denmark (8.2) and Latvia (8.4), above the average.

Trend in total greenhouse gas emissions per inhabitant. CO<sub>2</sub> equivalent in kilotonnes [CO<sub>2</sub>-eq (kt)]. Basque Country & EU27 2005-2022



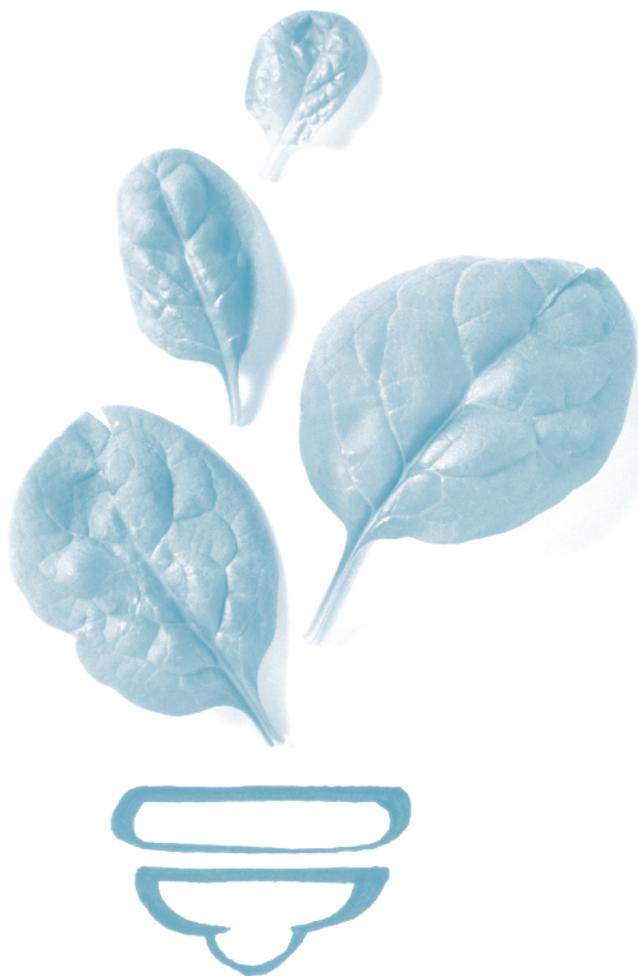
Total greenhouse gas emissions per inhabitant. CO<sub>2</sub> equivalent in kilotonnes [CO<sub>2</sub>-eq (kt)] Basque Country & European states. 2022



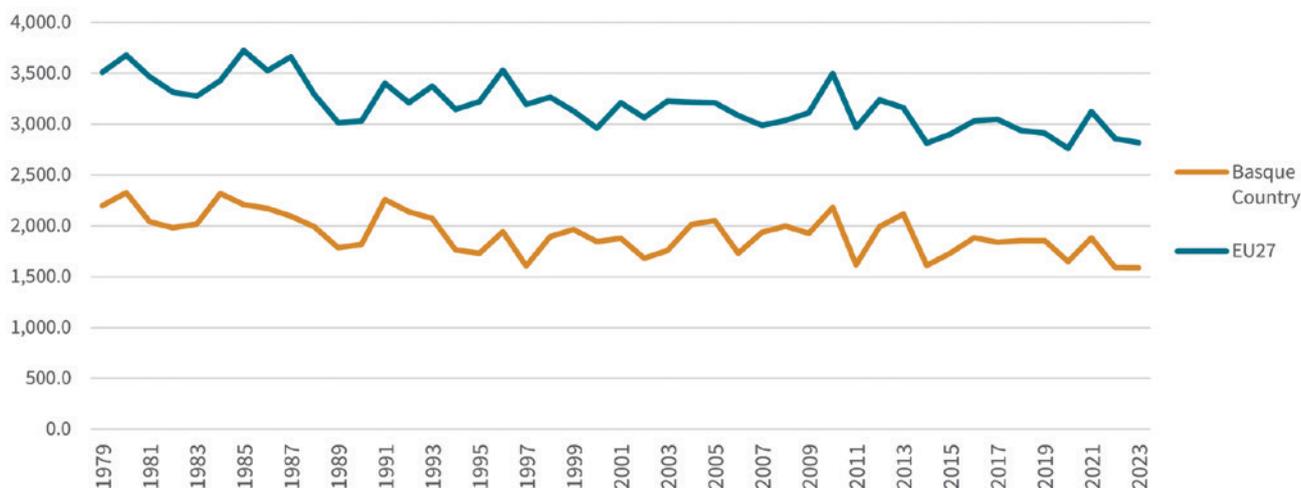
## 4.2 CLIMATE CHANGE

Heating degree days (HDD): these refer to the intensity of cold over a certain period of time, taking into account the outside temperature and the average ambient temperature (i.e. they indicate the amount of heating needed). The basic temperature value depends on various factors related to the building and its surroundings, but by using a general climatological approach, the basic temperature is set at a constant value of 15°C to calculate HDD. Therefore, the heating degree days (HDD) determined for the Basque Country and for the EU27 between 1979 and 2023 indicate how the intensity of cold has changed over the years.

Taking as a reference the Basque Country and the EU27, two points appear clearly. On the one hand, throughout this period there has been less need for heating in the Basque Country than across the EU27. And above all, both in the Basque Country and throughout the EU27, since 1979 the need to use heaters has gradually declined. Apart from short-term annual variations, the overall trend clearly shows this: the Basque Country went from 2,197.2 HDD in 1979 to 1,585.1 HDD in 2023. the EU27 had 3,509.57 HDD in 1979 and 2,820.92 HDD in 2023.



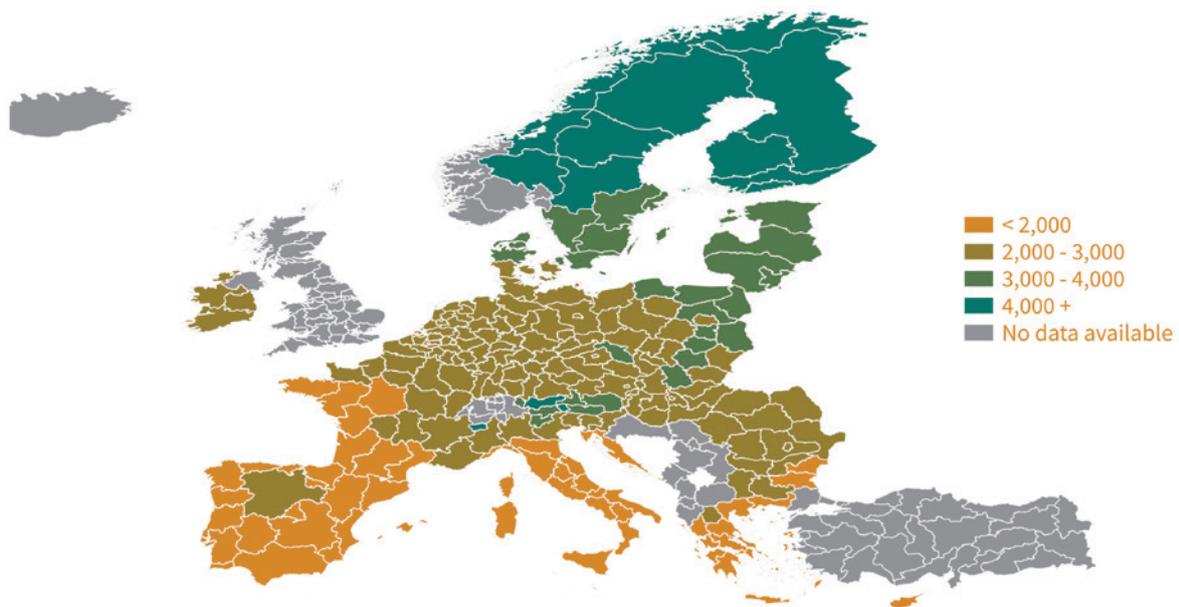
● Days of degree of heating. Basque Country & EU27. 1979-2023



In short, there has been less intense cold in the Basque Country in recent years. The averages across the EU27 are higher than in the Basque Country. This indicates that in other European countries heating needs are greater than in the Basque Country, but the trend is the same, as there is less and less need to use heating.

Analysed by regions, the southern regions are of course the ones that need least heating (the Canary Islands, Ceuta, Malta, the Southern Aegean, Cyprus, Melilla and Algarve), and the northern one those that need the most (Northern and Eastern Finland, Innlandet, Northern Norway and Upper Norrland). The Basque Country is closer to those with less needs.

● Days of degree of heating. Basque Country & European regions. 2023



HDD (Heating Degree Days): If the daily average temperature is below a reference temperature (e.g., 18°C), the difference is added to the HDD value. For example: If the average temperature on a given day is 10°C and the reference is 18°C, the HDD value for that day will be 18°C - 10°C = 8.

Annual HDD: It is obtained by summing up the daily differences.

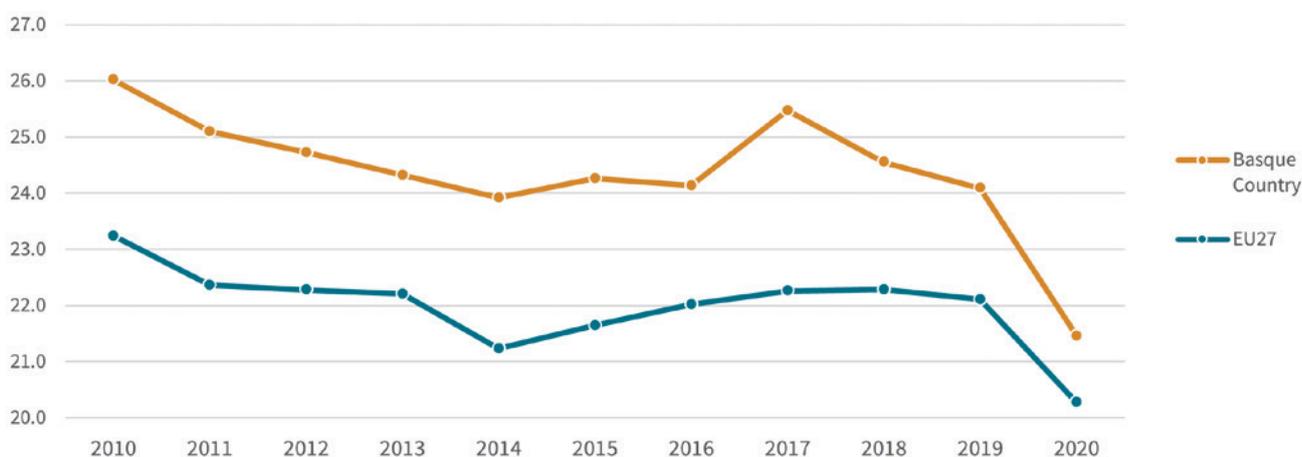
In the Basque Country the need to use heating is decreasing.

### 4.3 ENERGY AND FUEL CONSUMPTION

In 2010 the Basque Country used 26.0 Ktep per 10,000 inhabitants, falling slightly in subsequent years before returning to 24. In 2020 the figure was 21.5 Ktep per 10,000 inhabitants, but this was probably affected by the pandemic.

By states, the Basque Country is in the medium to high bracket. Those with the lowest consumption are Albania (6.5), Macedonia (8.8) and Moldavia (9.3). Those with the highest consumption are Finland (42.3), Luxembourg (60.9) and Iceland (81.2). However, the fifth state, Sweden, is below 30. The Basque Country is therefore far from these peaks, but remains among the countries with higher consumption.

Final energy consumption (Ktep/10,000 inhabitants). Basque Country & EU27. 2010-2020



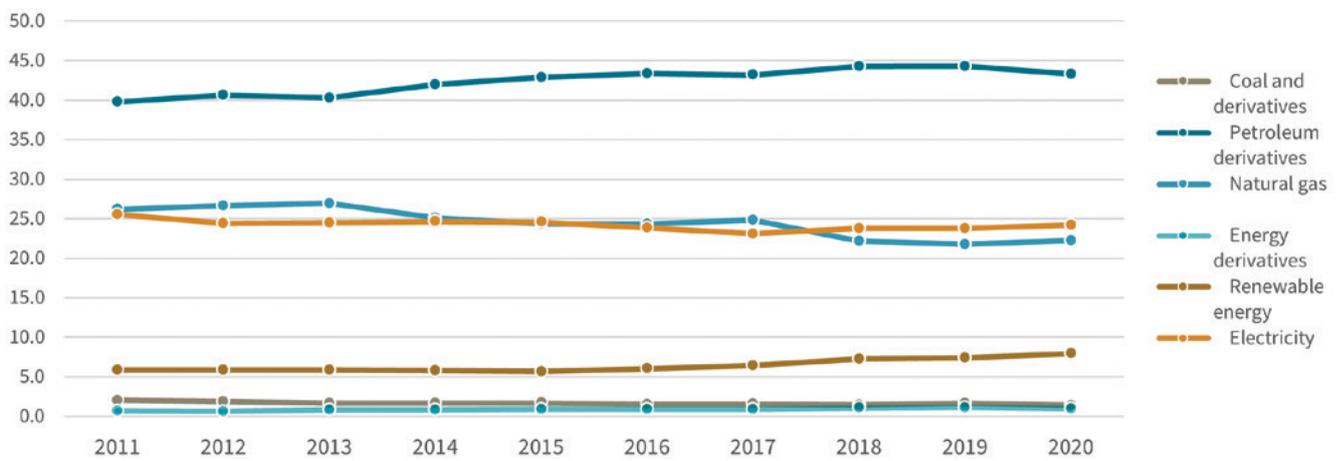
Final energy consumption (Ktep/10,000 inhabitants). Basque Country & European states. 2020



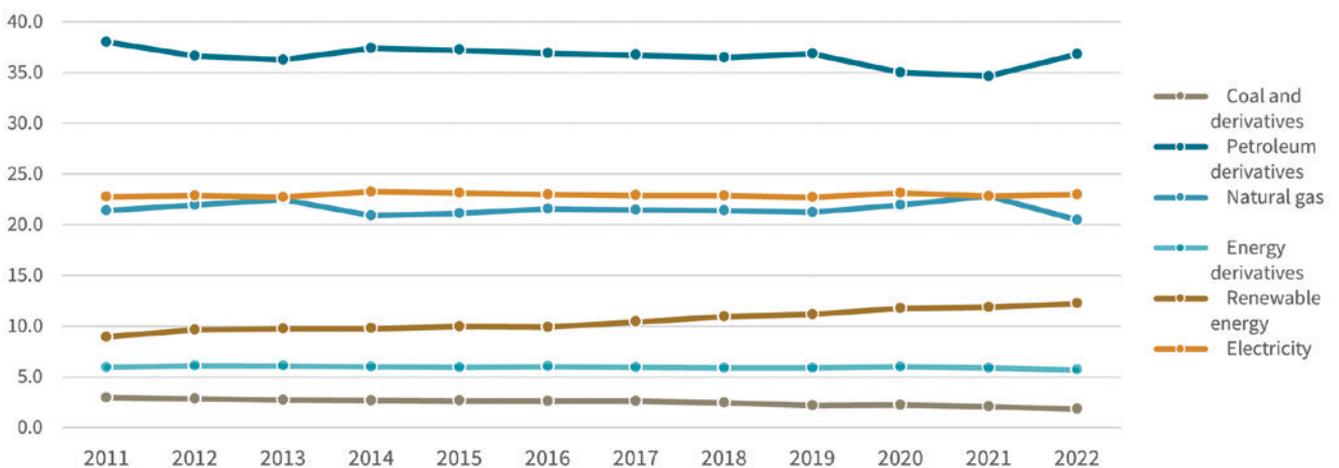
Analysed by energy type, in recent year oil has dominated energy consumption in the Basque Country (43.3%), and in fact this percentage has risen (in 2011 it was 39.8%). While the consumption of electrical energy has fallen in percentage terms, it is the second source of energy, after natural gas (22.2%). Apart from petroleum, the only sources of energy that have seen a small increase are renewable energies (from 5.8% to 7.9%).

In comparison with Europe, the trend in the Basque Country is not positive. The Basque Country has continued to increase its use of petroleum, going from 39.8% to 43.3%, while in the EU27 this fell from 38.0% to 35.0% in 2020. The use of electrical energy has fallen in the Basque Country but risen in the European Union (-1.7 and +0.4). In renewable energies, the Basque Country was up 2.1 points and the WU27 2.8 points. There is only one indicator in which the Basque Country beats the EU27: consumption of natural gas, which fell 4 points in the Basque Country, while rising 0.5 in the EU27.

Final energy consumption, by energy type (Ktep) % Basque Country 2011-2020



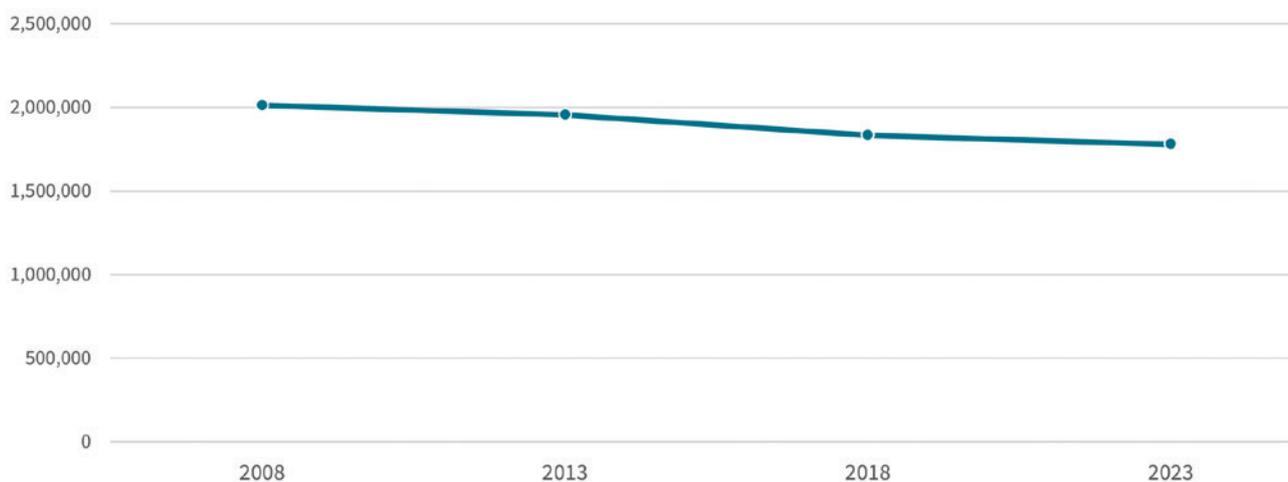
Final energy consumption, by energy type (Ktep) % EU27 2011-2022



## 4.4 FOOD CONSUMPTION

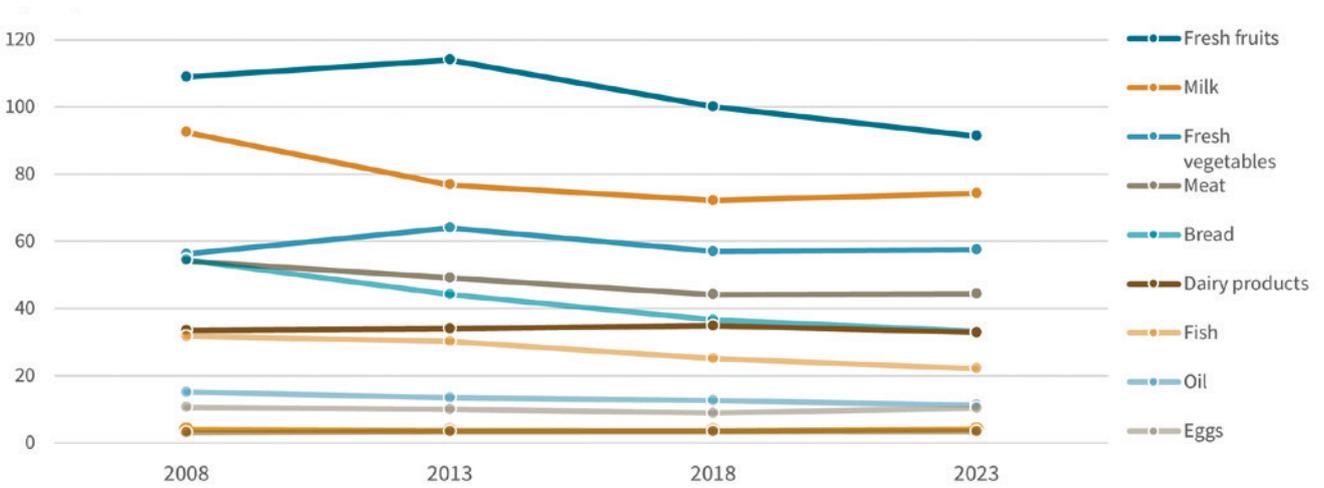
Food consumption in homes in the Basque Country has fallen significantly in the last decade. In 2008, annual food consumption was 2,012,068 kilograms, falling to 1,779,969 kilograms by 2023. Domestic food consumption has fallen steadily in all the data in the series.

● Food consumption by the population of the Basque Country (thousands of tonnes or litres). 2008-2023

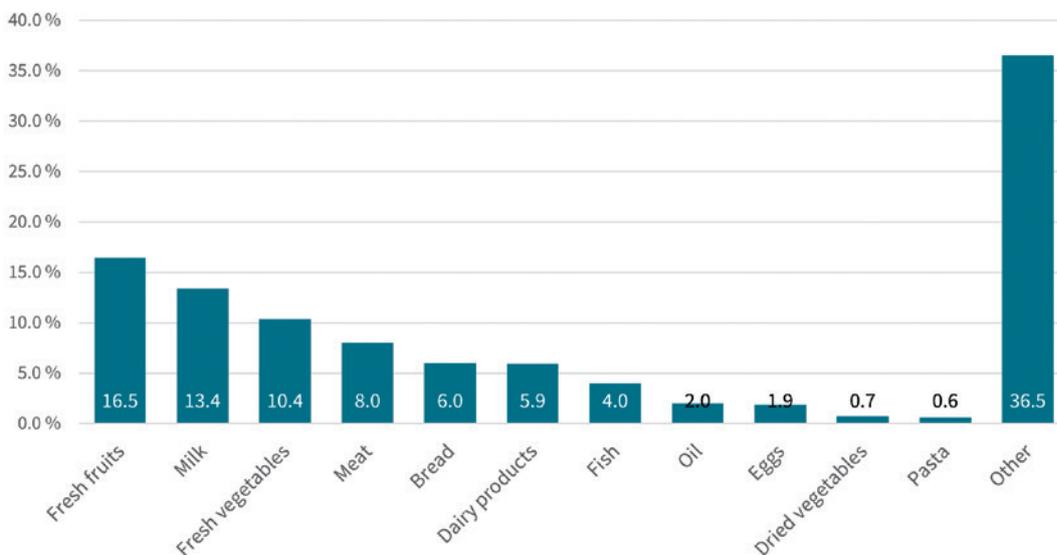


Analysis of food consumption by the population of the Basque Country shows that overall consumption (all food) fell steadily from 2008 to 2023, from 657 kilograms to 554 kilograms. By products, the items consumed most are fresh fruit (91 kilos per person per year), milk (74) and fresh vegetables (57). Fresh vegetables are the only category that has risen since 2008 (+1). The most significant decrease is in bread (21 less, falling by nearly half), followed by fresh fruit and milk (-18).

● Food consumption by the population of the Basque Country (kilos or litres per person per year). 2008-2023



● Food consumption by the population of the Basque Country, by type (%). 2023



In the Basque Country, greenhouse gas emissions fell from 11.8 CO<sub>2</sub>eq(kt) (equivalent to CO<sub>2</sub> in kilotonnes) per inhabitant to 8.6 between 2005 and 2022. Even with this reduction, compared to European states emissions remain above the European average.

In the Basque Country the intensity of cold (the average number of heating degree days or HDD) has declined in recent decades. The EU27 averages are higher than those of the Basque Country, indicating that in other European countries heating needs are greater than in the Basque Country, but the trend is the same: there is less and less need to use heating.

No clear downward trend in energy consumption can be seen in the Basque Country, which is among the places with the highest energy consumption in comparison with European states (except for three states with very high consumption).

By type of energy, the figures for the Basque Country's own evolution, especially in comparison with Europe, are not encouraging: the Basque Country mostly uses petroleum, and this is an upward trend, rising from 39.8% to 43.3%. Across the EU27, on the other hand, it fell from 38.0% to 35.0% in 2020. Consumption of electrical energy has fallen in the Basque Country and risen in the EU27 (-1.7 and +0.4). In renewable energies, the Basque Country was up 2.1 points and the EU27 2.8 points. There is only one indicator in which the Basque Country beats the EU27: consumption of natural gas, which fell 4 points in the Basque Country, while rising 0.5 in the EU27.

Food consumption in homes in the Basque Country has fallen significantly in the last decade, from 2,012,068 kilograms in 2008 to 1,779,969 kilograms in 2023. The products consumed most are fresh fruit (91 kg), followed by milk (74 kg) and fresh vegetables (57 kg); only fresh vegetables have seen a slight rise, while consumption of bread has fallen by nearly half (down 21 kg), and that of fresh fruit and milk has also fallen considerably (-18).

# METHODOLOGICAL SUMMARY

Description of the methodology of the system of indicators in the Basque Country

This system of indicators was designed to provide a basic diagnosis of the development of the Basque Country, taking into account the demographic, economic, social and environmental areas. Compatibility was sought with the indicators used at European level, and to do this data from various organisations was combined.

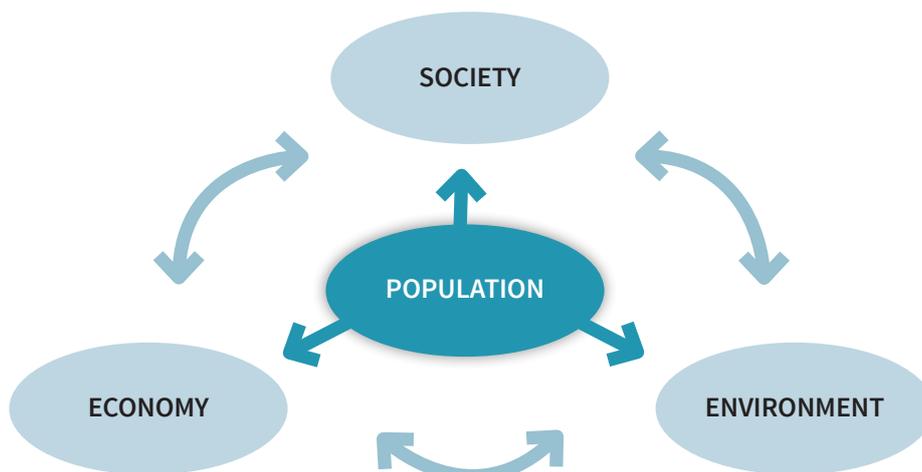
As a general principle, to ensure the compatibility and/or comparability of the indicators, common international definitions and methodologies were used, in accordance with the principles used by Eurostat. For this reason, in many cases, even though the quality of some data from Eustat or Nastat might have been higher, in line with the principle of compatibility priority was given to those provided by Eurostat.

To generate or obtain data on the Basque Country through some indicators, it was first necessary to estimate data on Ipar Euskal Herria, the part of the Basque country in France, which lacks its own data, and then weight it together with that for the rest of the Basque Country.

For many variables the official bodies make forecasts or estimates, somehow providing “more recent” data. In this report we have opted for consolidated data. In fact, many of these forecasts or estimates vary when they are fixed, so they can be used for guidance at a given time but, in view of the aims of this work, we have opted for data already considered to be consolidated. Therefore, for some indicators the last figure is from three or four years ago.

Finally, there are data, like those for population, that have a more or less recent reference year depending on the degree of disaggregation. For this reason, the reference year for a for the value of an indicator may differ depending on the geographical level in which the comparison is made or of the segment of this value (for example, from the general value by age or gender).

Regarding indicators, we have defined four areas in which to compile them (demographics, economy, society and environment) and within each of these areas a series of indicators. And these are shown below in different types of graph.



In these 4 areas we have grouped the 29 indicators we worked on as follows:

## 1. Demographics

The indicators related to demographics chart the current population situation and trends in the Basque Country. Population, density, age structure, migrations, births and deaths.

## 2. Economy

In the economic sphere, different indicators are assessed to measure productive capacity, trade, innovation and the well-being of the population of the Basque Country. The principal topics studied are the following:

- Gross domestic product (GDP) and GDP per capita, value-added structure and labour productivity.
- Trade figures (exports, imports and balance of trade).
- Innovation activities, business innovation, remuneration and income data.

## 3. Society

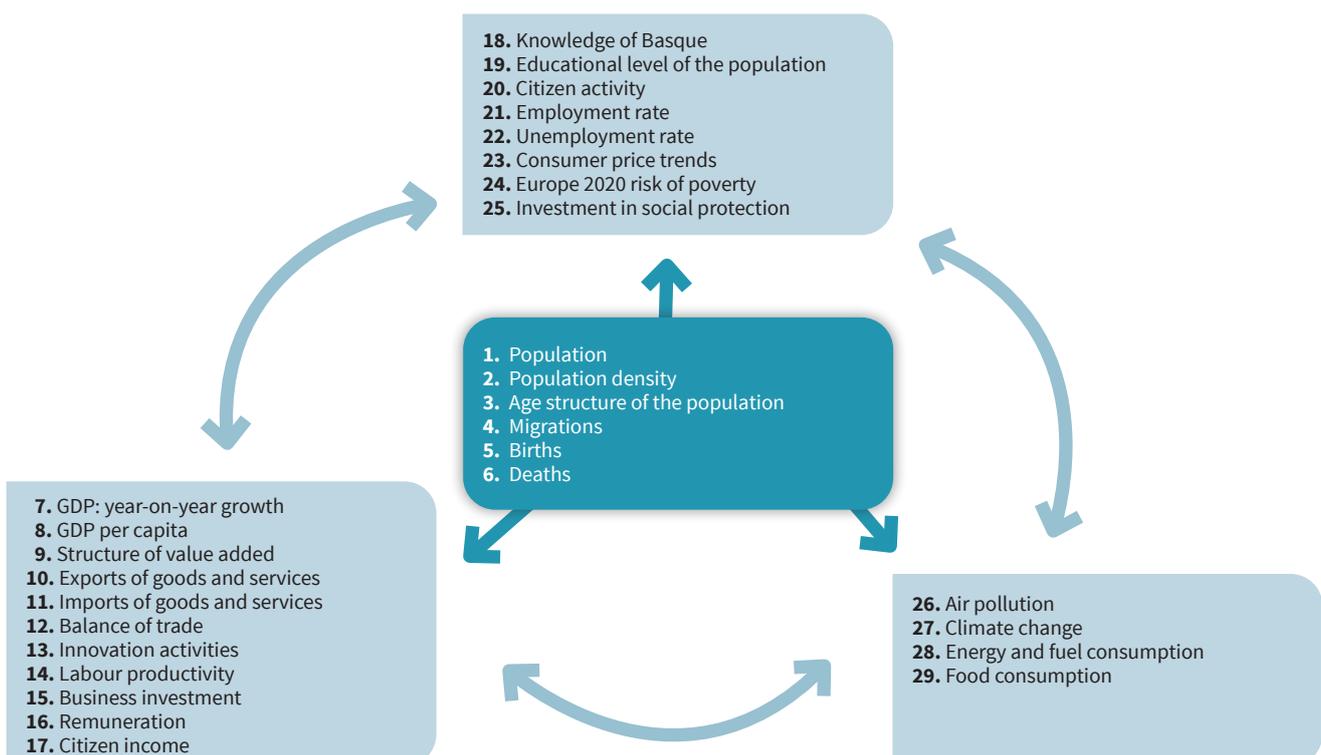
Indicators relating to society measure the welfare and social status of the population.

- Data on the evolution of knowledge and use of the Basque language.
- Analysing the level of training, citizen activity and the level of employment and unemployment in order to assess the social/employment status of the population.
- Evolution of retail prices, risk of poverty and investment in social protection.

## 4. Environment

The indicators relating to the environment reflect environmental quality and sustainability in the Basque Country by analysing the following factors:

- Air pollution, climate change and energy and fuel consumption.
- Consumption of foodstuffs to assess consumer habits and use of resources in the Basque Country.



## MAPS

This system of indicators uses maps created by Euskalgeo and Datu Tailerra to locate data on geographical areas and represent them visually. These maps include the internal structures of the Basque Country (by municipalities, regions and territories) as well as the international location of the Basque Country (among European regions and states).

GAINDEGIA has used this cartographic information to create all the maps and graphs in this report.

## SOURCES OF DATA

### DEMOGRAPHICS

1. Population: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
2. Population density: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
3. Age structure of the population: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
4. Migrations: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
5. Births: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
6. Deaths: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.

### ECONOMY

7. GDP: year-on-year growth: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
8. GDP per capita: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
9. Value added structure: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
10. Exports of goods and services: Eustat, Nastat, Spanish Ministry of Industry, Trade and Tourism, C-Interreg, Insee, Eurostat, GAINDEGIA.
11. Imports of goods and services: Eustat, Nastat, Spanish Ministry of Industry, Trade and Tourism, C-Interreg, Insee, Eurostat, GAINDEGIA.
12. Balance of trade: Eustat, Nastat, Spanish Ministry of Industry, Trade and Tourism, C-Interreg, Insee, Eurostat, GAINDEGIA.
13. Innovation activities: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
14. Labour productivity: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
15. Business investment: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
16. Remuneration: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
17. Citizen income: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.

## SOCIETY

18. Basque language: Eustat, Nastat, Basque government. Sociolinguistic survey and population census.
19. Educational level of the population: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
20. Citizen participation in the labour force: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
21. Employment rate: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
22. Unemployment rate: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
23. Consumer price trends: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
24. Risk of poverty: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
25. Investment in social protection: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.

## ENVIRONMENT

26. Air pollution: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
27. Climate change: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
28. Energy and fuel consumption: Eustat, Nastat, INE, Insee, Eurostat and GAINDEGIA.
29. Food consumption: Eustat, Nastat, Spanish Ministry of Agriculture, Fisheries and Food, INE, Insee and GAINDEGIA.





**GAINDEGIA,  
20 YEARS AGO**

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Antxon Lafont,  
educator about the  
cross-border Basque  
Country and civil  
society

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If I had to choose someone and place them at the birth of GAINDEGIA, it would have to be Antxon Lafont Mendizabal. This socio-economic observatory covering the whole of the Basque Country did not start to take shape until people joined the project and a qualified group was formed. But one name needs to be highlighted, and those who were there at the time inevitably look to this businessman from Donostia-San Sebastián. GAINDEGIA was formally set up and finally registered in the year 2004.

→Xabier Oleaga-Arondo

*Journalist and secretary of Gaindegia*

A highly cultivated man, with broad knowledge of fields including physics, chemistry and mathematics, with a solid intellectual training and fluent in Spanish, French and English (he tried to learn Basque, but did not manage to master it). During his career he has been, among other things, a businessman and director of the Bayonne chamber of commerce, and president of the Basque economic and social council (CES) at the proposal of the trade union representatives on this council. In 2009 he defended his doctoral thesis, on the Epistemology of Territorial Organisation - A Geopolitical Approach, at the UPV/EHU, for which the tribunal awarded a merit cum laude.

He has dreamed of the future and always seen the Basque Country from a European perspective. Among other things, this explains why he was put forward and chosen as a candidate to head the Bayonne chamber of commerce. He has also spoken out in this respect in his own experience as president of the CES. Carlos Etxebarria, in an interview with the newspaper Noticias de Gipuzkoa on 1st November 2011, said the following: “We have to embark on the process of setting up a CES covering the whole of the Basque Country, because there are more and more economic and social issues that affect both banks of the River Bidasoa.”

In a previous interview he had stated: “Territorial organisation is much more complex; it must be supranational.” “If we are talking about Europe and globalisation, we cannot create such organisation for a single autonomous region or territory,” he added.

Globalisation was also considered by this businessman from Donostia-San Sebastián. “In globalisation, if you do not have roots or identity, you can lose yourself,” he said. “The same is happening in speculative territorial organisation on another level: initiatives in one place or another are the same: there is no respect for identity. If we want an identity-free world, we are heading in the right direction. Not having a past is a great impediment, but not respecting the present is more than an impediment: it is fear of going into the future.”

### THE CENTURY OF WOMEN, AFRICA AND CIVIL SOCIETY

Civil society has often been a subject for reflection by Antxon Lafont. “Participation by civil society is one of the aspects that have characterised the 21st century,” he said. “It will be the century of women, of Africa and of civil society,” he stated in 2009 in another interview. “Civil society must prepare itself well and get a solid training. In this way it will reinforce political society, which is undergoing a crisis because people are fed up with many things but remains essential. Making arbitrary appointments without justification harms political society.”

With these convictions, coming from the business world but with a solid general philosophical and intellectual background, it is no surprise that he became involved in setting up a civil society platform, GAINDEGIA, to overcome the administrative obstacles to “creating a Basque space at European level” and overcoming the central or autonomous government definition (with reference to the autonomous communities within the Spanish state).

NOTE: - Antxon Lafont is currently in hospital. For this reason, we were unfortunately unable to interview him directly, which would certainly have been interesting. However, it is inconceivable for us not to mention him in this retrospective section on GAINDEGIA. Finally, we have made a selection of relevant texts, taken from the many media interviews and articles published over the years, as mentioned above.



Xabier Isasi Balanzategi

06-10-2024

## What does the Basque Country consist of?

In this land of some three million inhabitants, from Atharratze to Trucios, from Labastida to Gixune and from Hondarribia to Ablitas, different regions, industries, languages and landscapes coexist. As diversity within a small space is a feature of the Basque Country, we wanted to highlight and reinforce our character as a single people. This is why we set up GAINDEGIA twenty years ago.

The Basque Country has always been a natural route between the Iberian Peninsula and the rest of Europe; this geographical location has had a significant impact on our history. Leaving this aside, however, the Basque Country has always been a crucible of cultures and languages from which we have learnt. Moreover, our economic and social development has been linked to this status as a place of transit. The sea for us has been, rather than a frontier, a source of growth and prosperity, and in general we have been very astute in taking advantage of this position.

When, twenty years ago, we were thinking of generating ideas in the Basque Country, and of opting to set up the GAINDEGIA project, we were immersed in globalisation and the technological revolution. We are still immersed in a period of far-reaching change. Where and what we want to be within this interconnected world are still in doubt, and we have not made any significant progress

towards constituting the Basque Country. We realise the situation is not easy, but when have we ever had easy situations?

GAINDEGIA was born in stormy waters, without much help or protection, often suffocated but still alive. We have analysed the frontiers and vulnerabilities of the Basque people, we have determined how many citizens live in how many municipalities and how the territory is organised. We have realised that unity and *auzolan* (all neighbours working together) are the key to our progress. Likewise, in the new society of the Basque Country information, training, technology transfer, the constant exchange of ideas and the capacity for change have been crucial to social and economic development.

We have come together in GAINDEGIA as professionals from the world of business, academia, trade unions, the media and other sectors. This diversity of points of view, backgrounds and ways of thinking, without obstacles, became a distinctive trait of Gaindegia. Thus, we defined Gaindegia's primary goal in the following way: *to live and revitalise the broad socio-economic sphere of the Basque Country, setting out from national socio-economic realities, analysing the main lines of training and development and making it possible to take steps forward.* Thus, the founding goals of GAINDEGIA,

always oriented towards the construction and development of the Basque Country, were defined in three broad areas:

- 1. Analysis of the situation.** Institutions and public administrations in the Basque Country, organisations in the world of work (trade unions, business associations and social organisations), universities and research institutions. One way or another, all of them analyse the current situation. But most of the time, each one does so separately and within their own sphere. We lacked a comprehensive, integrated vision. Therefore, Gaindegia started to work on this integration and comprehensiveness. This has been Gaindegia's contribution,



We have analysed the frontiers and vulnerabilities of the Basque people, we have determined how many citizens live in how many municipalities and how the territory is organised.



and what has made Gaindegia credible and useful.

- 2. Creating links, building networks.** We have encouraged relations between socio-economic agents in the Basque Country: fostering mutual knowledge, making possible technology and knowledge transfer, receiving them from institutions in each area and collaborating in their task of institutionalisation: businesspeople, professional associations, trade unions, professionals and media networks. And at the same time, analysing the imbalances that exist between and within the territories and seeking ways to overcome these.
- 3. Disseminating information and fostering debate.** To project the image of the Basque Country we have immersed ourselves in topics relation to the construction and development of the Basque Country. Without ignoring competition, we have shown that national projects are possible above and beyond it.

In the big data era, proper exploitation and interpretation of data is absolutely necessary. The Basque Country, if it is to exist in these times, needs it. This, among other things, is what Gaindegia does. In our opinion this is what Gaindegia should be doing; if not, who?



Imanol Esnaola  
Coordinator of Gaindegia  
from 2004 to 2021.

## The beginnings of an observatory

When the founding assembly of Gaindegia established the basic lines of the project (2004), new hopes and aspirations with major repercussions were stirred: an economic and social observatory covering the whole of the Basque Country!

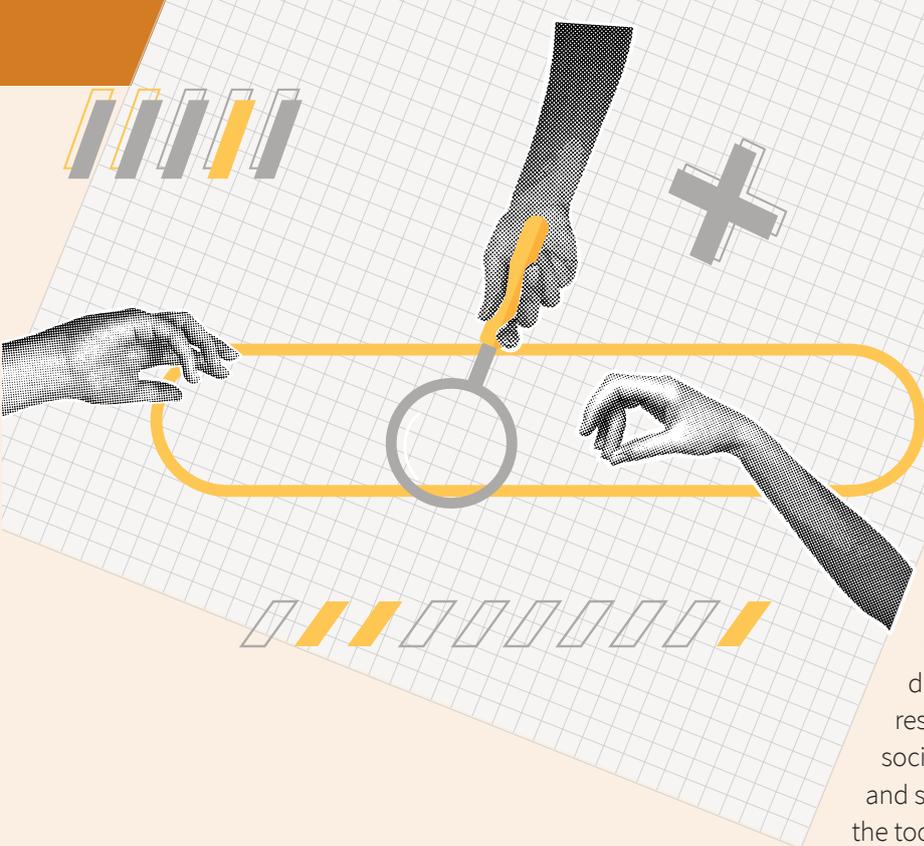
Gaindegia was not starting out from zero: work was proceeding on activities, research and systems of indicators that could not be put together, that could not complement one another on a local, reciprocal basis and linked to their respective challenges. In this respect, Udalbiltza, through projects like Datu Talai, set out to give a sample of what could be done about a reality that is rich but fragmented (2002).

But what was Gaindegia's role at that time? And how was it to go about it? Many people who had been in the formal and informal forums of nationalism came together there, and both the deficiencies and the opportunities were obvious to all. But it was another thing to draw up a project that could make a contribution in the current situation. Certainly, a second trait must be added to the above-mentioned fragmentation: a tendency among many of us to diverge that is quite long-standing on our part.

So how were we to meet the challenge to create, disseminate and develop a national vision?

At that point in time the questions about what to do and how to do it were on the table, and seemed contradictory. The job of giving a shape to the object of the association fell to Xabier Isasi and myself, the former as president and the latter as coordinator. And to answer these questions in material terms, we had to follow a process similar to an obstacle race: assuring the material commitments, forming the work team, defining the work processes and publishing the results at the same time. We took on the task of devising a working definition of the Basque Country. If the observatory's mission was to provide knowledge about the Basque Country, the strategy we adopted was to focus on the working definition of the Basque Country. What are the dimensions of our country? How is it changing? Where do we stand in relation to the benchmark countries and states? What does the socio-economic geography of our country consist of? What is each area like? How do they differ?

Arriving at a working definition of the Basque Country called for this job to be done in an approved way. Among other things, this meant taking into account the standard indicators, official sources of data and approved territorial structures. And it was not an easy task, among other things because our country has its own deficiencies. In any case, with hindsight, the decision was the right one. Gaindegia played an active part in giving an approved image



in the snapshot created by the indices? and how to publish the results?

We built up the work group gradually and, thanks to everybody - those who were in it and those who got involved over a long period of time - we soon filled the observatory with content. Over time we added partners, projects and results. By the time Gaindegia collapsed, Basque citizens and organisations had a range of resources and information at their disposal. Countless reports and pieces of research, a repository of data, an interactive socio-economic atlas, spatial data infrastructure and so on. Gaindegia even managed to establish the tools for a working definition of the Basque Country and make them available to all.

of the Basque Country and its territory in the main structural spheres, amid the globalisation process.

On the other hand, we had an embedded problem. As well as comparing the Basque Country with other countries, information and analysis were needed in the detailed dimensions of our territory, in the geographical spheres of everyday life. Municipalities, valleys, counties, localities and urban districts, river basins, areas of cross-border cooperation. There are many functional areas of Basque territory and many agents committed to these challenges. In this way, the most complete job possible was done in this respect: cataloguing territorial structures, calculating indices, showing it all on maps and so on.

Once this basis had been established, there remained all the rest: which indicators to prioritise? how to construct the mathematical model to serve as a basis for calculation? what discourse to show



What was Gaindegia's role at that time? And how was it to go about it? Many people who had been the formal and informal forums of nationalism came together there, and the weaknesses and opportunities were obvious to all.



However, while the experience we were discussing prospered, the world underwent rapid, intensive changes. Globalisation led to the development of digitalisation: disruptive technologies and procedures for working with data emerged.

New issues also arose in the globalised world (pandemic, climate change, migratory processes) that came together with the agenda led by the feminist movement. The observatory strove to adapt to digitalisation, making all its content accessible online. It also blazed new trails, such as overcoming the masculinisation of socio-economic information and documenting technological and environmental issues. But many of the challenges mentioned were new for humanity, and even most statistical plans in the Basque Country did not know to move on. Gaindegia reached this point in a similar way. Therefore, it will all need to be constructed.

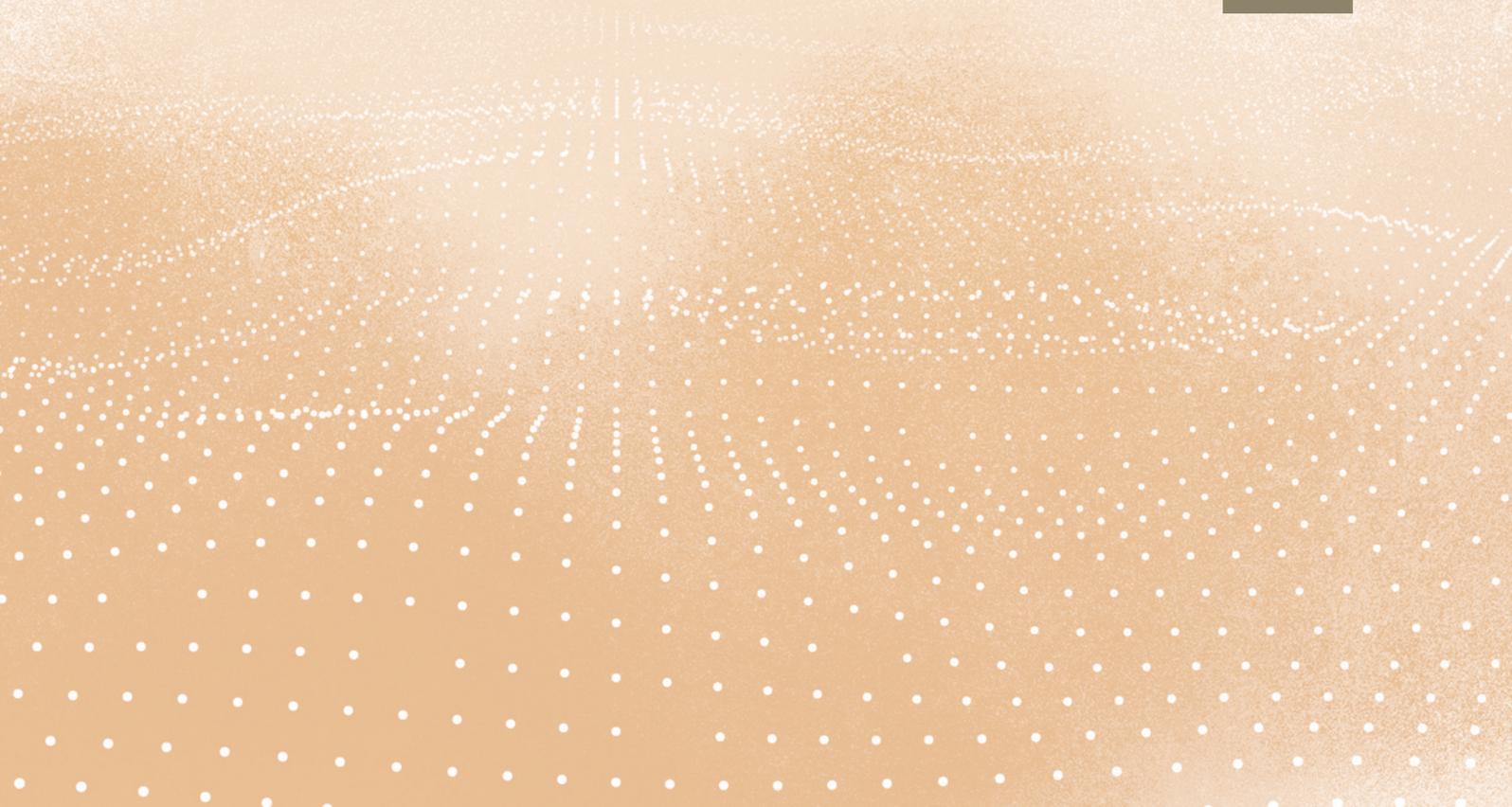
It has to be said that Gaindegia ended its first stage (2004-2021) fulfilling its promise: to provide tools to serve as raw material for knowledge and reflection in the Basque Country; in other words, the most complete, accurate and accessible resources about the Basque people and their territory ever in the history of our country, constructed through the voluntary contributions of young people and adults in different spheres and, in the dream of normality, offered to the Basque public through standard media.

Yes, it was possible - and it still is.





# GAINDEGIA 2030



# THE MAIN MEANS FOR THE NEW STAGE ARE READY

Once the Basque Country (and therefore also Gaindegia) had got over the footprint left by the global health crisis of the beginning of this decade, the observatory embarked on its recovery, so beginning its new stage.

Both its mission and its internal structures have been rescaled.

With regard to the latter, it will focus on the current socio-economic scene in the Basque Country, drawing on annual statistics. To this end, the service will be outsourced rather than depending on its own resources.

Once the statistical report has been drawn up, the next step will be disseminating it and running discussion sessions about its contents. Dissemination in both general and specialist media, as well as the educational, school and university spheres. For the discussion sessions, critical content will be selected and presented to interest groups (business, trade union, administration, environmental, etc. experts).

The reports, like the website, will be published in three other languages: Spanish, French and English.

As regards internal structures, apart from its ordinary management and the general meeting of members, Gaindegia has started up a new branch. This is called the Scientific Committee. It will not be an executive but a consultative body, but it will play an important role within the organisation.

This committee is made up of fifteen people. They include experts from all the universities in the Basque Country: professors, doctors and researchers. It includes the public universities of Navarre and of the Basque autonomous community; the universities of Deusto and Mondragón and Lapurdi Estia, the school of industrial technology. Absent are the university of



This photograph is twenty years old. It was taken in front of the former premises of the Donostia-San Sebastián chamber of commerce. The founding meeting of Gaindegia was held in a room there.

## Management team



Iñaki Dorronsoro  
President



Xabier Oleaga  
Secretary



Joxe Mari Sors  
Treasurer



Anjeles  
Iztueta



Txus  
Peña



Edurne  
Larrañaga



Eguzki  
Urteaga



Rafa  
Díez Usabiaga



Malen  
Dominguez



Anjel  
Rekalde



Itziar  
Moreno



Carlos  
Etxeberri



Miriam Herrero  
Chief Executive

# Scientific Committee



Anjeles  
Iztueta



Dascon  
Juhane



Kiko  
Caballero



Martin  
Larraza



Arantxa  
Diaz de Ilarraza



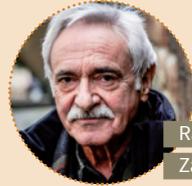
Oskar  
Arantzabal



Alberto  
Alberdi



Elena  
Franco



Ramon  
Zallo



Izaskun  
Andueza



Mikel  
Navarro



Unai  
Pascual



Unai  
Villalba



Joseba  
Makazaga



Jaione  
Etxeberria



Jose Javier  
Zubikarai



Julen  
Bollain

Navarre and UPPA, the university of Pau and the Adour region, but it is hoped that both institutions will soon join the committee of experts.

The majority of them come from the fields of economics, sociology and new technology, but there are also former holders of senior positions in government.

In view of the profile of its members, the goal of this committee is to ensure the quality and reliability of Gaindegia reports. Its first task will be to propose the criteria for drawing up the socio-economic report from 2025 onwards.

The coordinator of the committee is Anjeles Iztueta, a mathematician and former member of Eustat, former Basque government minister of education, universities and research and currently a member of the management committee of the Basque summer university.

In setting up this decision-making body, a balance was sought between Basque territories, according

to gender criteria, links to the socio-economic sphere and so on, as well as people's ability to form a genuinely plural, effective group. Among those taking part are members of the Agirre Lendakaria Center, MonzonLAB and the Ipar-Hegoa foundation, as well as a representative of Eusko Ikaskuntza, current president of the observatory Gaindegia and ex-president of Eusko Ikaskuntza, Iñaki Dorronsoro.

Only one person is employed at Gaindegia, the administrator Miriam Herrero. All the others do their job on a voluntary basis. Finding for projects is intended to come from financial organisations and public administrations. At the time of writing, funding commitments have been made by Laboral Kutxa and the government of Navarre, though further significant contributions are soon to be announced together.

With its operating framework in place and its structural pillars constructed, Gaindegia is ready to embark on a new journey.

Anjeles Iztueta  
Coordinator of the GAINDEGIA  
Scientific Committee

«We want to construct a solid, innovative system of socio-economic indicators»

#### **What is the role of the Scientific Committee within GAINDEGIA?**

Strictly, it is to assure the quality and credibility of GAINDEGIA's statistical publications, but in a broader sense it is also to suggest thematic proposals, as it constitutes qualified consulting work group, and in this respect it has the role of suggesting and guiding.

#### **Taking into account its membership, what are the features of this committee?**

The Scientific Committee is made up of fifteen people with extensive experience from the whole of the Basque Country. They come from many subject areas: Economics, the Environment, Sociology and Social Sciences, Sciences and Data Technology. We are also attempting to balance it in terms of gender and Basque regions; in this respect we are also moving closer to our goals. Among the members of the group are representatives of all the universities in the Basque Country (public, cooperative and private), professors, doctors and researchers. However, there are also officials in the economic sphere who work in government.

#### **What is the role of the Scientific Committee in the short term?**

In the coming year, our main mission will be to draw up proposals for updating the system of socio-economic indicators in the Basque Country, to be developed by GAINDEGIA.

**How will the system of indicators be renewed?**

The concept of socio-economic statistics and that of GDP itself have expanded considerably today. The new system of indicators in a territory should be able to measure its economic, social and environmental health in a balance, integrated way. To do this, it should extend to various areas, each with its own specific set of indicators.

**What kind of sections should it have?**

I will mention some of these, as the list is arguable. Sustainability of the economy, for example. To achieve a sustainable economy, for example, as well as the quality of economic growth, environmental and social impacts are also taken into account. Even if we focus on welfare, balanced welfare aims to adequately meet the needs of society, i.e. to ensure cohesion and quality of life. With regard to the economy and the labour market, indicators in these areas analyse the country's stability and competitiveness, as well as workers' welfare. Climate change and the environment cannot be ignored today. Climate change and environmental indicators are essential to sustainable development.

**And together with the climate, what about more up-to-date measurements?**

Yes, of course. Care, for example. Today we need to measure care. i.e. this innovative section measures and assesses care work that falls outside the formal economy but is essential for people to live their lives. And sustainable infrastructure and transport. If infrastructures and transport in a territory are sustainable, this means promoting care for the environment and balanced access by the public to resources. There is also the area of innovation and digitalisation. This analyses technology and innovation as drivers of a sustainable, inclusive economy.

**So are these new concepts?**

Yes, many concepts are new and until recently were practically excluded from GNP. It is time for a rethink, in order to provide data to help us predict the situation and the future in Basque territory. We want to construct a solid, innovative system of socio-economic indicators.

The official sources of statistical data have undergone considerable development and expansion. We must therefore select the data

in accordance with an innovative strategic conceptual architecture.

**The sources of data are also numerous, as the Basque Country is divided into three administrative units.**

Of course, the use made by GAINDEGIA of official statistical data will mainly be at macro level, in order to show the realities of the territories in the Basque Country and to contribute to strategic planning in both the long and the short term. Unifying data, on the other hand, despite the difficulties it entails, also offers a series of important advantages and objectives. In terms of difficulties, the data are gathered from a range of sources (public, private and international), each of which may have different criteria for measurement and definitions. Unifying the data involves assuring their coherence and quality, and at times putting together methodologies from different territories and sectors is a major challenge.

**So is it possible to put a name to these sources?**

We have the official sources of data, Eustat (from the Basque government) and Nastat (from the Navarrese government) close at hand. Nastat covers the peculiarities of the INE in Navarre. And we use the French Insee for measurements in Ipar Euskal Herria, the northern Basque Country. But we also have the economic data of the five chambers of commerce: Bilbao, Baiona-Bayonne, Donostia-San Sebastián, Vitoria-Gasteiz and Pamplona.

**Does a standard exist?**

GAINDEGIA decided from the start to adhere to the accepted standard as a methodological model. In this case, the OECD and Eurostat.

**And from a technological point of view?**

GAINDEGIA was set up twenty years ago now. Right the start it was not easy to gather data on the Basque Country and unify them in terms of methodology. A lot of work has been done in this respect. We have Dalu Talaia and the interactive atlases for the whole of the Basque Country.

Technology has advanced considerably. Media for dissemination are very varied and have improved a lot. Open software can be used. The brief versions in PDF are prepared digitally for many media - PC, tablet, telephone and paper - and are disseminated in rapid, varied ways on social networks.

[gaindegia.eus](http://gaindegia.eus)