



Invest in
BASQUE COUNTRY

Basque Country General
Presentation

Invest in Basque Country

Demography



Surface
7,234 sq.km



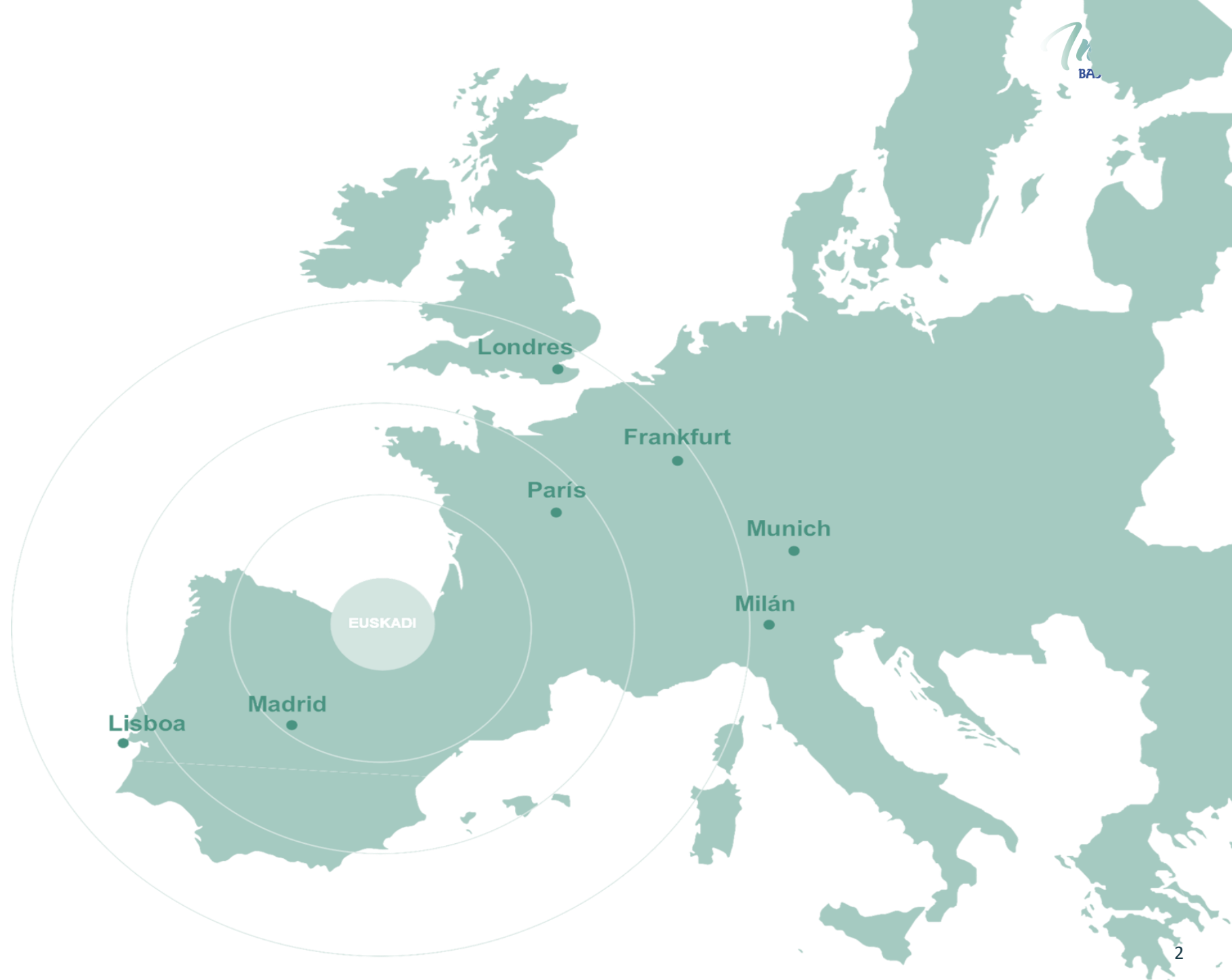
Forest Area
68%



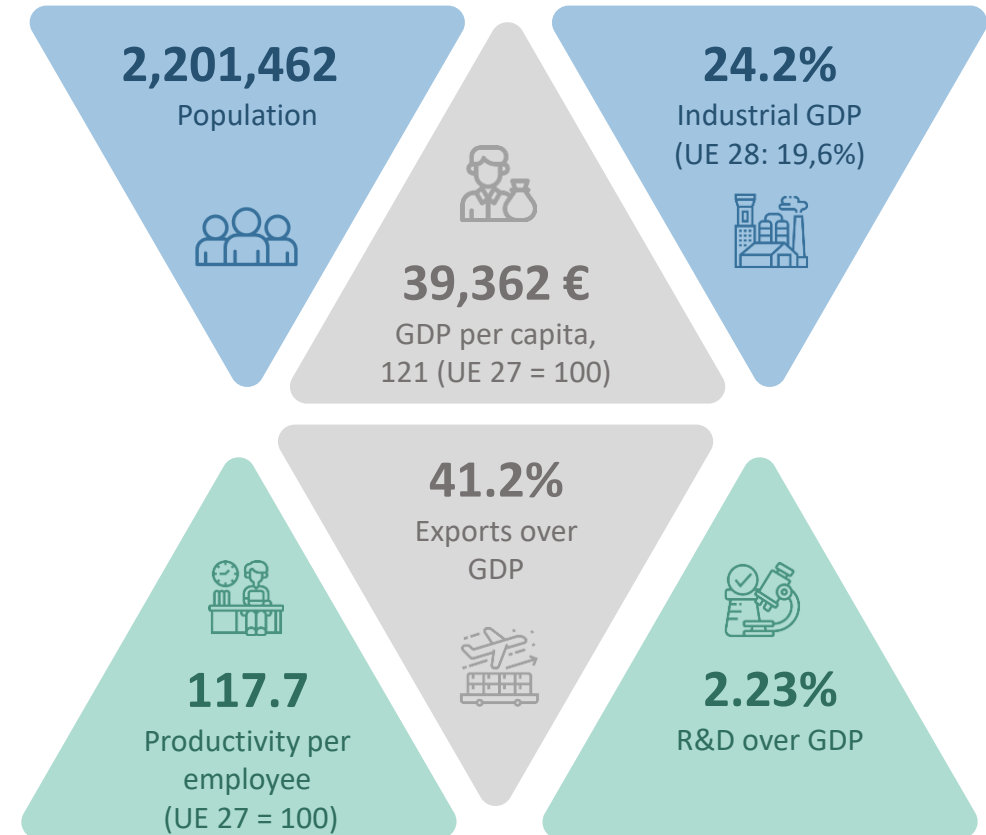
Population
2,201,462



Population Density
304.3 hab/km2

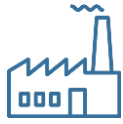


Some Figures about Basque Country



Economy - Employment and Exports & Imports

Employment impact of the industry* (EUSTAT, 2022-2023)



No. of industrial establishments

10,751



Industry turnover

74,642 M€



R&D Staff

21,746



Staff employed in Industry

195,068



Top 10 exporters and importers of the Basque Country ** (2023)

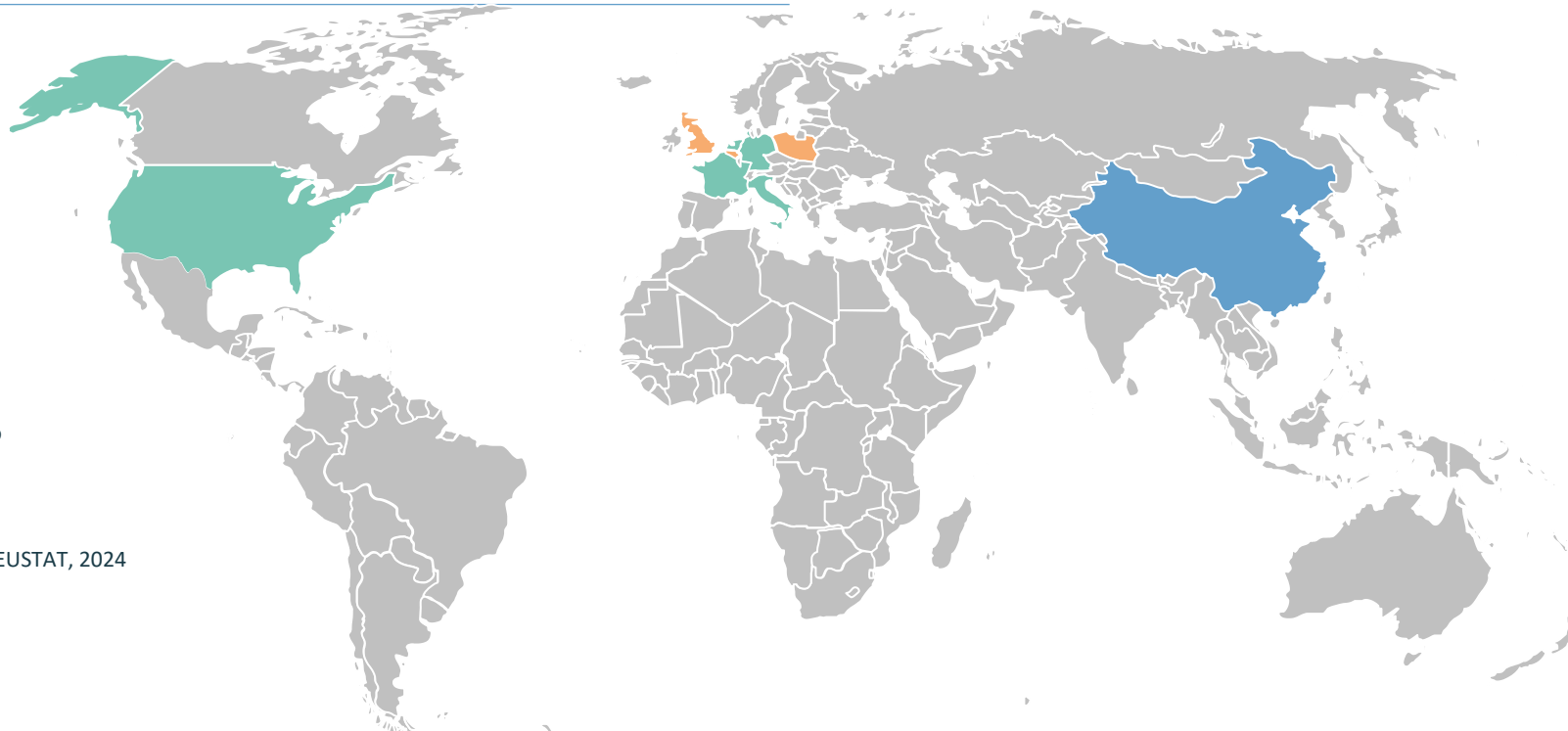
**TOTAL EXPORTS
2024**

13,056,304 m€

**TOTAL IMPORTS
2024**

6,507,274 m€

EUSTAT, 2024



- Exporters
- Importers
- Both

O.1 Priority sectors, identifying FDI opportunities



Main sectors in the Basque Country

Automotive



40,000 employments
25,000 M€
300 companies

- Present in all functions of the vehicle (transmission, engine, interior elements...)
- Major Tier 1,2,3 companies and OEMs

Energy



25,986 employments
15,700 M€
+200 companies

- Sector with a large presence in all the CoVs (wind, solar, hydrogen, etc.)
- Presence of large tractor companies

Electronic & ICT



26,613 employments
6,142 M€
315 companies

- Integrated solutions for the development and evolution of organizations, infrastructures and processes
- Division of the VC in 2 dimensions

Machinery & Tool



7,529 employments
1,710 M€
+100 companies

- 90% of machine tools in Spain are manufactured in the Basque Country
- 3rd largest producer in Europe and 9th largest in the world

Aerospace



5,495 employments
1,183 M€
53 companies

- Sector present in the main Global Programmes and Clients - Aerostructures, Engines, Systems and Space
- Strong institutional support

Biohealth



10,000 employments
2,400 M€
+115 companies

- Strategic sector, within Health 4.0
- Close relationship with CTI
- High opportunities in biotechnology

Eco-industries



15,396 employments
2,882 M€
436 companies

- A benchmark territory in Eco-industries and Circular Economy
- Both local and international laboratories

Logistics and Mobility



55,592 employments
12,527 M€
+100 companies

- Strategic position in the EU, as a logistics hub and key link in the European Atlantic Axis
- High-capacity logistics infrastructure network

Food



15,232 employments
4,840 M€
2,020 companies

- Food for Future: innovation event to transform the industry
- Basque Culinary Center: higher education centre

Automotive

300
companies



40,000
employments



25,000 M€



Main keys of the sector in the Basque Country

- ✓ **Excellence** in all the processes of the automotive sector (electric and autonomous) for all functional áreas
- ✓ **Basque Electric Mobility Strategy 2030**
- ✓ Large Basque capital companies (Gestamp, CIE) and **48 multinationals**: DAIMLER MERCEDES-BENZ, BRIDGESTONE, MICHELIN, GKN, PIERBURG, ZF, MEGATECH, HUTCHINSON...
- ✓ OEM production plant: **Mercedes Benz** high-end and electric vehicle manufacturing plant in **Vitoria-Gasteiz**, Spain
- ✓ **AIC**: Automotive Intelligence Center



168
partners



Energy

+200
companies



25,986
employments



15,700 M€



Main keys of the sector in the Basque Country

- ✓ **EIC** - Energy Intelligence Centre: Innovation and generation centre, valuable for the energy Industry
- ✓ **EnergiBasque Strategy**
- ✓ **Basque Hydrogen Strategy 2030**
- ✓ **Electric mobility** as a transversal driving force initiative
- ✓ **Smart Grids Innovation Centre**
- ✓ Onshore and offshore wind energy: **WINDBOX**
- ✓ Marine energy: **BIMEP Marine Power Centre**



200
partners



Electronic & ICT

315
companies



26,613
employments



6,142 M€



Main keys of the sector in the Basque Country

- ✓ **The Basque Industry of Knowledge and Applied Technology (ICTA)** offers **integral solutions** aimed at developing and evolving organisations, infrastructures and processes
- ✓ The value chain of the sector in the Basque Country is divided into **two distinct dimensions**:
 - ❖ Systems and solutions
 - ❖ Enabling technologies



315
partners



*It encompasses more companies outside the Electronics & ICT sector

Machinery and Tools

+100
companies



7,529
employments



1,710 M€



Main keys of the sector in the Basque Country

- ✓ **INVEMA:** Foundation for Machine Tool Research
- ✓ **ADDIMAT:** Additive Manufacturing Cluster
- ✓ **INVEMA:** Advanced Manufacturing Research
- ✓ **IMH:** Vocational Training
- ✓ **BIEMH:** Biennial Machine-Tool Fair



693*
partners



*Cluster encompassing companies from all over Spain

Aerospac

53
companies



5,495
employments



1,183 M€



Main keys of the sector in the Basque Country

- ✓ **Complete value chain:** Aerostructures, Engines, Systems and Space
- ✓ Industrial and Technological fabric certified: EN9100, NADCAP, DOA/POA...
- ✓ **Sector led by 4 Tier1:**
 - ❖ Aciturri
 - ❖ Aernnova
 - ❖ ITP Aero
 - ❖ SENER Aerospace
- ✓ Intense in research, development and testing:
 - ❖ R&D&I Cluster Plan
 - ❖ CFAA: Aeronautical Advanced Manufacturing
 - ❖ CentreCTA: Aeronautical Technology Centre
 - ❖ 10 CCTT and Universities with aerospace activity



hegan 
basque aerospace cluster



76
partners



Biohealth

**+115
companies**



**10,000
employments**



2,400 M€



Main keys of the sector in the Basque Country

- ✓ Made up of the biopharmaceutical (biotech and pharma) and health technology (medical devices, in vitro diagnostics and digital health) industries
- ✓ Growing sector, with a cluster (Basque Health Cluster) and continuous creation of start-ups
- ✓ Public health system with electronic medical records, biobank, registers and connected and integrated tools; and its own research centers with a corporate head (BIOEF)
- ✓ Intensive in R&D, with an environment of centers and groups of excellence; more than 25 infrastructures (research and technology centers, university hospitals, science and technology parks, and unique platforms) with activity in health and biosciences
- ✓ Specialized investors
- ✓ Priority area in policies: RIS3, Healthy Ageing as a Transversal Tractor Initiative, Health Research and Innovation Strategy 2025.



**BASQUE
HEALTHCLUSTER**

**121
partners**



FDI companies established in the Basque Country

Main FDI companies in the Basque Country (SABI 2022/2023)*



Company	Location
ALVEAN SUGAR SOCIEDAD LIMITADA.	Bizkaia
INDUSTRIA DE TURBO PROPULSORES SAU	Bizkaia
ALUDIUM TRANSFORMACION DE PRODUCTOS SOCIEDAD LIMITADA.	Bizkaia
BRIDGESTONE HISPANIA MANUFACTURING SOCIEDAD LIMITADA.	Bizkaia
TOTALENERGIES CLIENTES SOCIEDAD ANONIMA.	Bizkaia
ARCELORMITTAL OLABERRIA-BERGARA SL.	Gipuzkoa
VISA INTERNATIONAL SERVICIOS DE PAGO ESPAÑA SOCIEDAD LIMITADA.	Bizkaia
DHL PARCEL IBERIA SL.	Gipuzkoa
DACHSER SPAIN SA.	Bizkaia
SIEMENS GAMESA RENEWABLE ENERGY SOCIEDAD ANONIMA	Bizkaia
COMPAÑIA DE BEBIDAS PEPSICO SL	Araba
ACEROS INOXIDABLES OLARRA SA	Bizkaia
ARRAIA-OIL SL	Araba
EDP IBERIA SOCIEDAD LIMITADA.	Bizkaia
BAHIA DE BIZKAIA ELECTRICIDAD SOCIEDAD LIMITADA	Bizkaia
SCHAEFFLER IBERIA SLU.	Gipuzkoa
GUARDIAN GLASS ESPAÑA CENTRAL VIDRIERA SL	Araba
SIEMENS ENERGY S.A.	Araba
VAILLANT SAUNIER DUVAL SA	Bizkaia
PAPRESA SL	Gipuzkoa
CIE AUTOMOTIVE, SA	Bizkaia
Layde Steel SLU	Bizkaia

*Companies present in the Basque Country with ≥10% foreign capital are considered.

Source: DataInVex 2023

0.2 Technology and Innovation



R&D in the Basque Country

Number of researchers in the Basque Country (Iberbasque, 2023)



Nº of persons

14,366

Active population fully or partially engaged in research

2%

R&D investment per capita

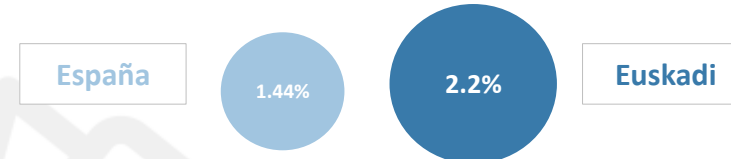
EUR (2022)



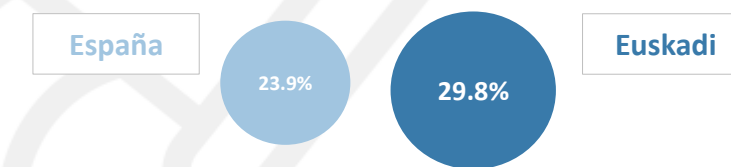
✓ The Basque Country leads by far in the ranking of R&D investment in Spain.

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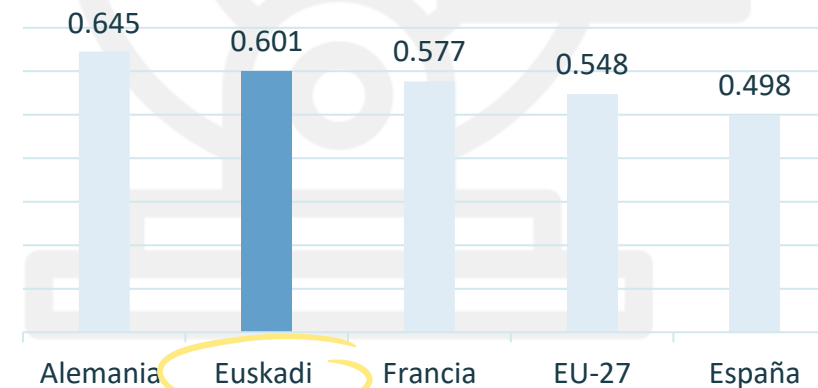
R&D expenditure (Eustat, % GDP, 2022)



Innovative companies with >10 people (Eustat, %, 2022-2023)



European Innovation Scoreboard -EIS (2023)



Euskadi "strong innovator"

Science and technology ecosystem



Basque Technology Park

- Multicampus Model – 9 Campus
- +660 companies and technological agents
- +22.000 people employed (more than half of them with higher education)



4 Cooperative Research Centres

- CIC bioGUNE (biosciences)
- CIC energiGUNE (energy)
- CIC biomaGUNE (biomaterials)
- CIC nanoGUNE (nanosciences)



6 Innovation Centers

- AIC - Automotive Intelligence Center (Bizi/Bike Intelligence Center)
- EIC - Energy Intelligence Center
- BAIC - Basque Artificial Intelligence Center
- CFAA - Aeronautic Advanced Manufacturing Center
- Basque Cybersecurity Center
- WINDBOX - Advanced Manufacturing Centre for Wind power



4 Business Innovation Centers (BICs)

Since they were set up, these Centres have supported the creation of 2,000 companies, which have generated 10,500 jobs and have mentored more than 4,000 entrepreneurs

- BIC Araba
- BIC Bizkaia
- BIC Bizkaia Ezkerraldea
- BIC Gipuzkoa



9 Basic Research and Research Centres of Excellence (BERC)

- FBB Bizkaia Biophysics Foundation
- BCAM Basque Centre for Applied Mathematics
- BCMaterials Basque Centre for Material Applications and Nanostructures
- DIPC Donostia International Physics Centre
- BCBL Basque Centre for Cognition, Brain and Language
- MPC Material Physics Centre
- Achucarro: Basque Centre for Neurosciences
- BC3 Basque Centre for Climate Change
- Polymat Basque Centre for Macromolecular Design and Engineering



BRTA. Basque Research & Technology Alliance

A great alliance to boost the Basque Country's technological ecosystem

- +4.300 researchers
- 816 M € annual investment
- 120 annual patents
- 2,252 companies

BRTA: Basque alliance for R&D



Main BRTA data



3,900
Researchers



300 M€
Investment



1,500
Publications



120
Patents per year

Technology and research centres



Transfer

- Improving the competitiveness of companies
- Generating a high impact on the socio-economic environment through the transfer of the knowledge generated
- Collaboration with companies, offering knowledge in the form of scientific-technological solutions
- Dynamisation of the valorization of research results through patents.

Excellence in research and technology

- Defining a research agenda
- Responding to challenges from research and technology
- Promoting collaboration, excellence, specialization and critical mass in R&D in the Basque Country.

Main areas of activity



Smart
industry



Green
energy



Personalised
health care



Healthy
eating

* Source: Página web BRTA

0.3 Talent Pool



Main Universities



Universidad de Deusto
Deustuko Unibertsitatea
University of Deusto

DEUSTO UNIVERSITY

Private university founded in 1886 by the Society of Jesus

2 campus and 2 sedes

(Bizkaia and Gipuzkoa) (Madrid and Vitoria)

7 faculties

47

degrees and double degrees

66

university master's degrees

9

PhD



UPV EHU

UNIVERSITY OF THE BASQUE COUNTRY

Main higher education institution in the Basque Country and one of the most important in Spain

3 campus

(Bizkaia, Gipuzkoa and Araba)

31 faculties

103

degrees and double degrees

120

university master's degrees

67

PhD



Mondragon
Unibertsitatea

MONDRAGON UNIVERSITY

Non-profit cooperative, part of the Mondragon Corporation

5 campus

(Bizkaia and Gipuzkoa)

4 faculties

18

degrees and double degrees

22

university master's degrees

6

PhD



tecun
Universidad de Navarra

NAVARRA UNIVERSITY

Private university founded in 1952 in the Autonomous Community of Navarre

2 campus

(Gipuzkoa)

1 faculties

12

degrees and double degrees

10

university master's degrees

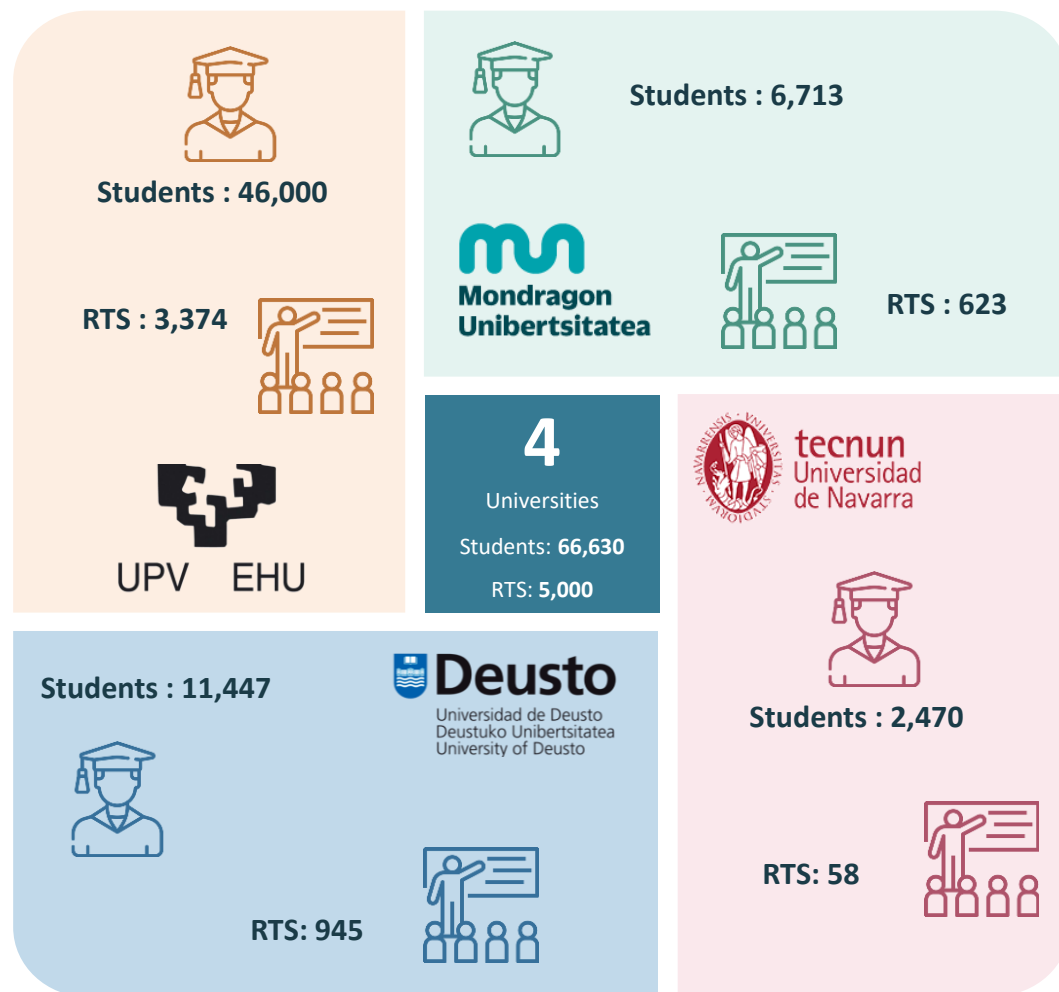
1

PhD



University education in the Basque Country

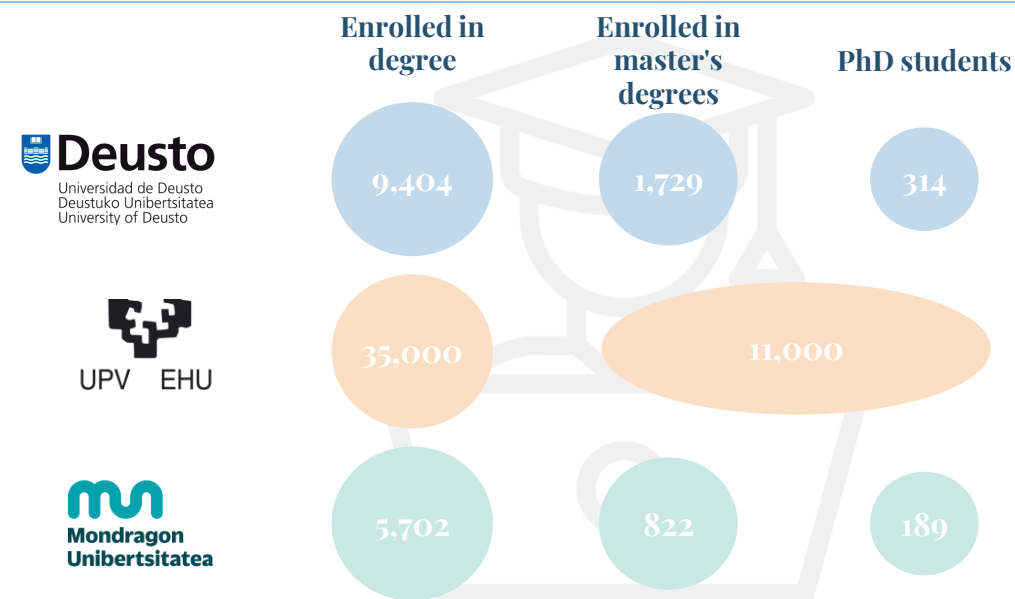
Main Universities in the Basque Country (nº, 2021)



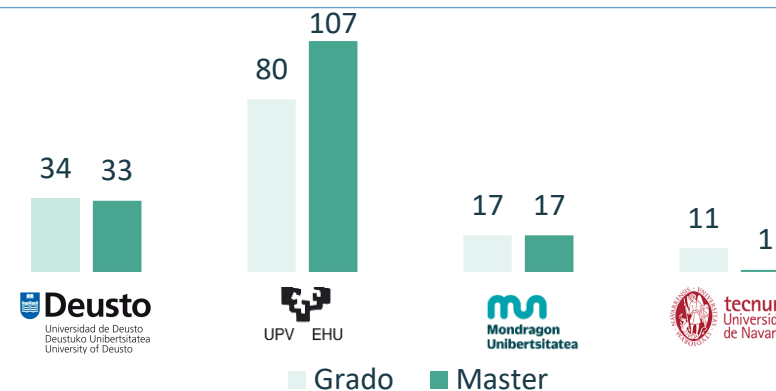
RTS: Research teaching staff

*Data obtained from the universities and from the Basque Department of Education

No. of students enrolled by university (no. 2022-2023)

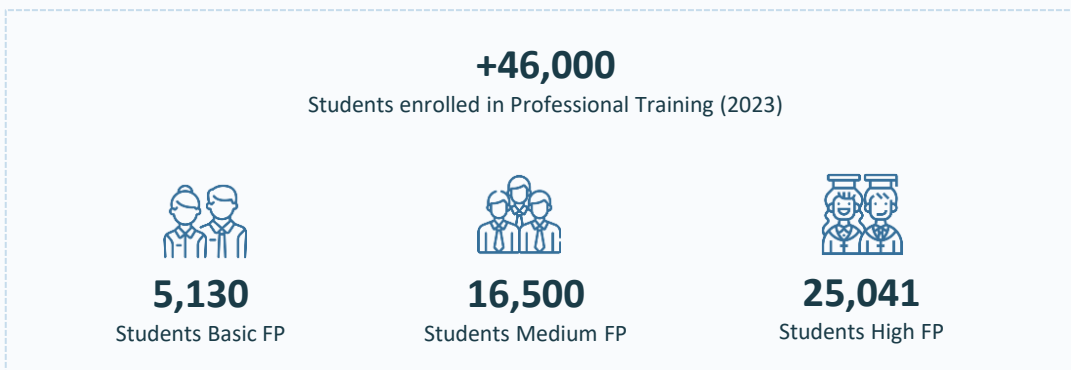


Total number of degrees per university (No., 2021)



Professional training in the Basque Country

Main data on Professional Training (Eustat)



“Professional training in the Basque Country is the first EU test bed for the introduction of applied innovation learning”

Bodies linked to Professional Training



TKNIKA, the Centre for Applied Research and Innovation in Professional Education and Training



Basque Institute for Professional Training



O.4 Quality Infrastructure



Quality infrastructure Connections



Ports

Port of Bilbao
Port of Pasaia

17 ports

Freight traffic with more than **35 M tons/year**

Connection to more than **800 ports**



Railway Network

High-speed railway network that makes up the integrated network of multimodal infrastructures in Euskadi



Airports

PASAJEROS
Bilbao Airport
Donostia-San Sebastián Airport

COMMODITIES
Vitoria-Gasteiz Airport



No. of passengers

+700,000,000

Cargo flights (tonnes)

73.6 Millions of Kg



"Financial Times Best
Connected Europe Mid-Size
Region Award"

*Source: Eustat, IBC, AENA 2021

0.6 Quality of Life



Quality of life in the Basque Country

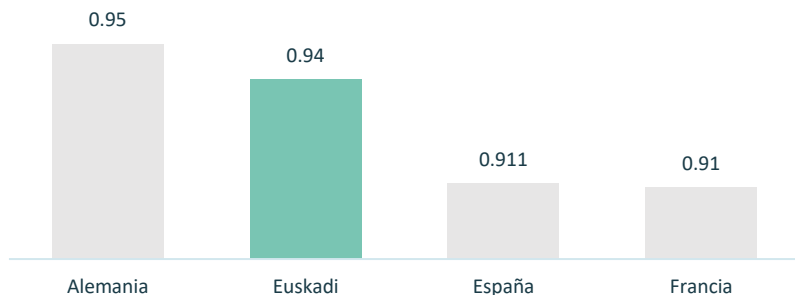
Key quality of life figures

Balanced social and economic development, the search for excellence, the processes of transformation of cities, the internationalisation of companies and the firm commitment to innovation make **the Basque Country one of the most attractive places to live and invest in**

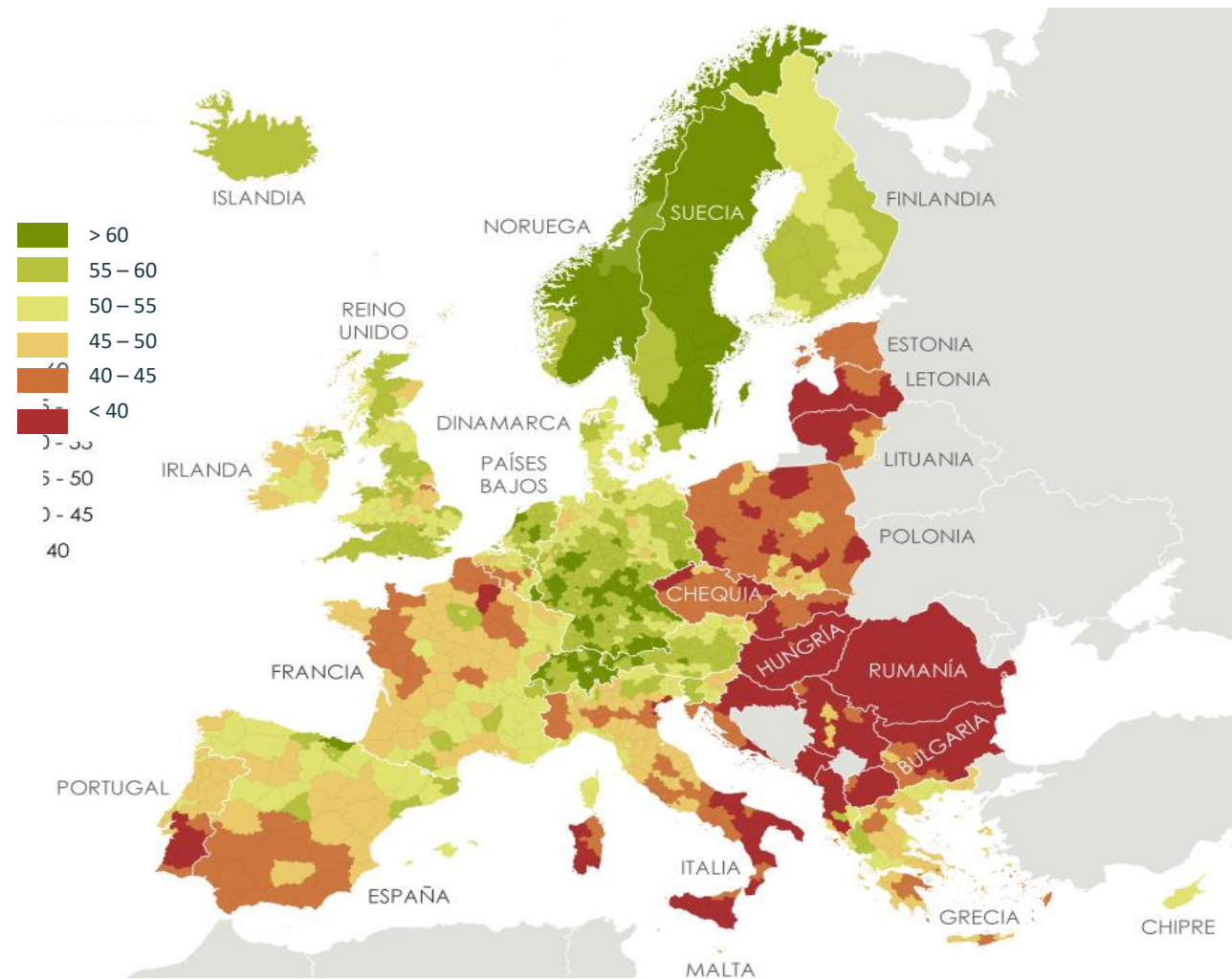


The **Basque Country's Human Development Index (HDI)** places Basque society among the most developed on the planet

Human Development Index (2023)



*Datos Eustat 2023



- Good life enablers index
- Life development (personal health, economic situation)
- Satisfaction with the environment (self-esteem, confidence)

Thank you!

