

EUSKADI,
A LAND OF
OPPORTUNITY
FOR THE
FOOD SECTOR

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EUSKADI
BASQUE COUNTRY



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A GREAT PLACE TO LIVE

To know each other better



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THE BASQUE COUNTRY IN FIGURES

SURFACE AREA

7.234 Km²

POPULATION

2.193.199 inhabitants.

DENSITY

300 people/km².

GDP PER CÁPITA

€36.282.

INDUSTRIAL GDP

23,9% (UE28: 19,3%).

2.010 INTERNATIONALISED COMPANIES.

Exports to GDP ratio: 32,1 %.

THE BASQUE COUNTRY IS ONE OF THE REGIONS WITH THE HIGHEST PRODUCTIVITY PER WORKER IN THE EU

121 (UE28: 100).

INVESTMENT IN R&D+i

1,86 % of GDP.
19.274 researchers.

HUMAN DEVELOPMENT INDEX

0,937.

WOODED FORESTRY AREA

54%.

HIGH LEVEL OF VOCATIONAL TRAINING

Main figures





ENERGY

63.364 Jobs

21.185 in the Basque Country

€ 46.811 M

€ 15.032 M in the Basque Country

Highly dynamic cluster.

IBERDROLA, SIEMENS, GAMESA, GE, PETRONOR



MACHINERY & TOOLS

12.672 Jobs

€ 1.731 M

The third largest producer in the Eu.

AFM, ADIMMAT, BIEMH. DANOBAT, ZAYER



ELECTRONICS & ICT

20.047 Jobs

€ 5.175 M

Hub in comprehensive electronics, IT and Telecommunications.

ZTE, IBERMATICA, EUSKALTEL



AEROSPACE

14.856 Jobs

4.985 in the Basque Country

€ 2.457 M

€ 990 M in the Basque Country

Hegan Cluster: value chain.

ITP, ROLLS ROYCE, AERNOVA, SENER, CFAA



AUTOMOTIVE

100.000 Jobs worldwide

40.924 in the Basque Country

€ 19.311 M

>50% of Spain's component industry.

GESTAMP, CIE, MERCEDES BENZ, BRIDGESTONE



RAILWAY

14.176 Jobs

€ 2.600 M

One of the most pioneering.

MAFEX CLUSTER CAF, TALGO, BOMBARDIER



BIOHEALTH

8.000 Jobs

€ 1.700 M

Basque BioRegion: cooperation between the University, the Health System and Industry. Health Cluster.

FAES PHARMA, PRAXIS, PROGENIKA-GRIFFOLS, ROXALL



AGRO-FOOD

137.480 Jobs

€ 4.400 M

105 clustered companies

Close link between food industry and local producers with officially recognized certifications from both, origin and/or quality



ECO-INDUSTRIES

20.000 Jobs

€ 4.000 M

Reference Territory in Eco-industries and Circular Economy. ACLIMA Cluster / Basque Ecodesign Center.

INDUMENTAL RECYCLING, IDOM, ACCIONA AGUA

INDUSTRY, THE DRIVING FORCE OF THE BASQUE ECONOMY

34.273 €

Income per capita

24%

Industrial contribution to GDP

Committed to

R&D+I e internationalisation.

Industry 4.0.

Clusters policy.

Smart specialisation strategy (RIS3) based on:

- Smart Industry.
- Personalized Health.
- Cleaner Energy.



2.0

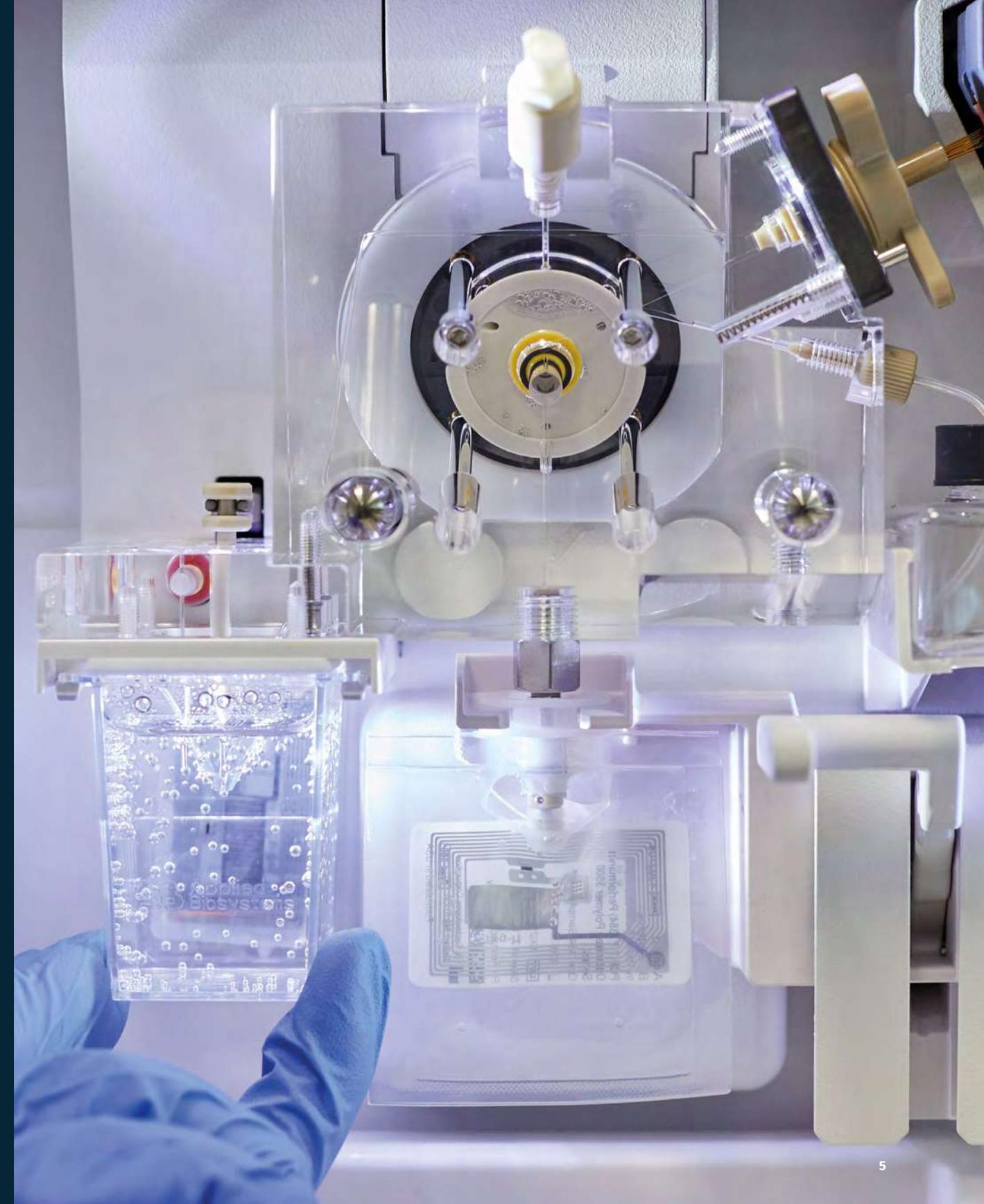
DESCRIPTION OF THE BASQUE COUNTRY COUNTRY FOCUS

The Basque Country, Europe's best-connected medium-sized region (*Financial Times, 2016*) represents one of the greatest concentrations of industry in Spain, with levels of quality and productivity placing it towards the top of the European rankings.

Drawing on its experience and tradition, the Basque Country has embarked on the drive for competitiveness, within a globalised and highly industrialised economy, with more than 5,000 companies holding the highest level of quality certification.

Thanks to a committed industrial ecosystem and firm institutional commitment to a meaningful industrial policy, the Basque Country has successfully established itself as a leading global player in a number of industrial sectors, such as advanced machinery, automotive, aeronautics, energy, railway and maritime industries, and eco-industries.

The complete food value chain in the Basque Country accounts for 9.37% of GDP. Food is one of the major strategic challenges selected by the European Union, and is one of the sectors for the future to which the Basque authorities are firmly committed, through a national gastronomic and food strategy for the Basque Country, encouraging innovation and digital transformation in the food industry.



3.0

SITUATION AND OPPORTUNITIES OF THE BASQUE FOOD SECTOR

3.1

Institutional support and commitment

Commitment to specialisation in generating value through the existence of increasingly efficient processes:

- Safer, more sustainable and healthier production ecosystems.
- The development of a new range of services and products for a population increasingly aware of combined food/health issues.
- The incorporation of new digital and biotech methods.

Support for a food value chain, from farming to healthy food consumption, placing food consumers at the heart of the entire value chain, and seeking out synergies and interrelationships with other economic, cultural and social sectors.

The Basque Country is a land of great potential with clear opportunities linked to the technological-digital transition, above all for companies and agents in the ICT sector in addressing global challenges:

- Climate-focused energy transition.
- Food waste.
- Recovery and reuse of food by-products.
- Social and health transition.

The Basque Country's goal is to drive, promote and develop cuisine and food as a strategic sector of its economy, given its capacity to generate employment and economic activity, to preserve culinary cultural heritage, and natural and landscape resources.

Which is why the total investment assigned to the food chain over the period 2021-2024 could exceed 1.165 billion euros, of which the total public expenditure could amount to 480 million euros, including the initiatives covered by the **Next Generation Programme**.

4.0

FOOD VALUE CHAIN OF THE BASQUE COUNTRY

4.1

Context

The FVC combines activities which range from farming and processing to distribution, catering and hospitality, all the way to the end consumer. The competitiveness of this chain is likewise underpinned by the presence of other agents connected both with ancillary industries (*bottling and packaging, machinery and capital goods, etc.*) and with the provision of support services. In addition, the sector is closely related to relevant agents in the region, including in particular Public Authorities, Scientific-Technological Agents, and other bodies dependent on Government.

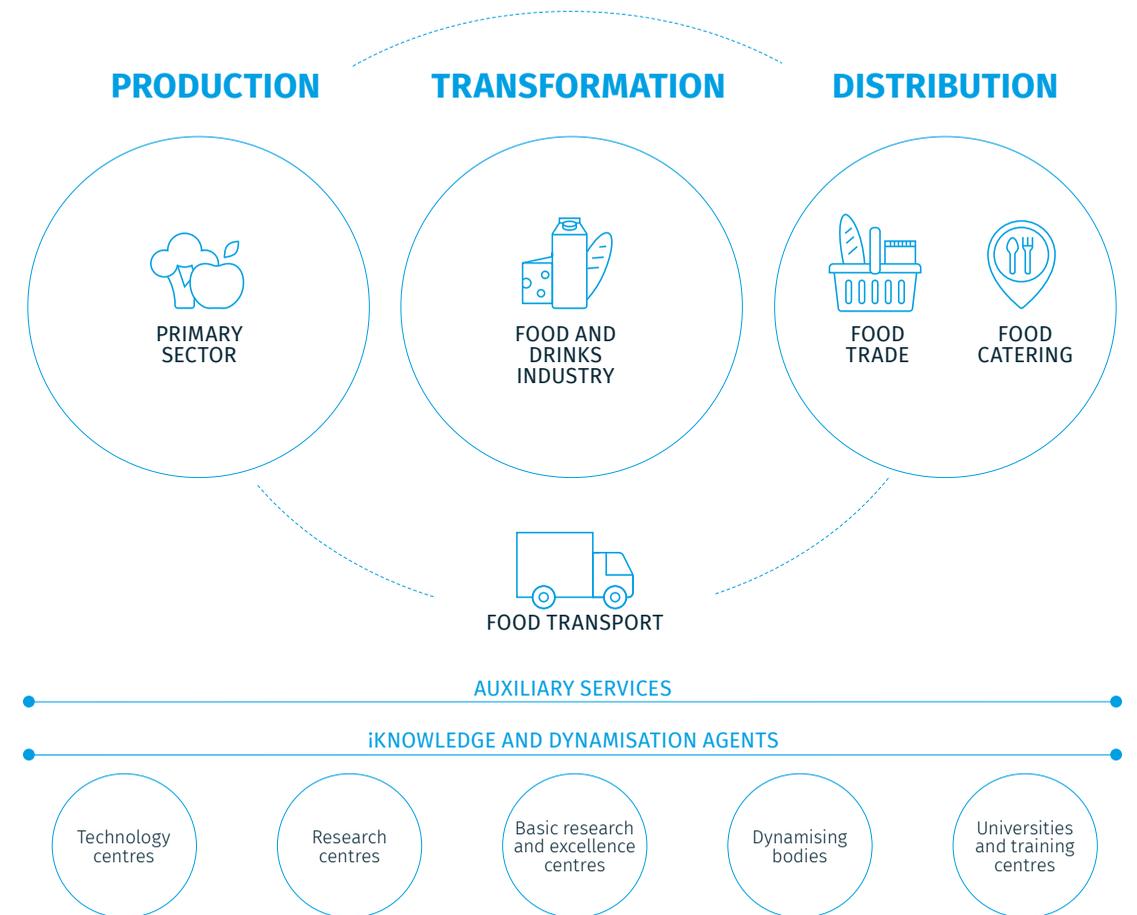
The Food Value Chain of the Basque Country plays a strategic role in the Basque economy, providing forward momentum through the proportion of GDP that it represents and the jobs created, as well as its growing contribution through investment in innovation, in addition to culture, gastronomy and tourism.

4.2

Subsector structure

The FVC represented 9.37% of overall Basque GDP in 2021. The primary sector accounts for 7.36% of this chain, while the Food and Drink Industry represents 16.12%, with hospitality and retail being the most significant

sectors, accounting for 31.38% and 27.75%, respectively. Non-characteristic branches account for 11.53%, and transport 5.76%.



4.3

Potential suppliers of raw materials

Although the Basque Country has limited agrarian output, there are farming cooperatives in certain sub-sectors which have attained a degree of critical mass allowing them to function as suppliers of raw materials for any companies that might set up operations here:

CEREALS

Garlan S.Coop.

FRUIT AND VEGETABLES

Garaia S.Coop; Barrenetxe S.Coop.

POTATOES

Udapa S Coop.

RIOJA WINE

Bodega Unión de Cosecheros de Labastida S. Coop; Bodega vinícola Lapuebla de Labarca S. Coop;

BEEF

Urkaiko S.Coop.

DAIRY MILK

Kaiku S Coop.

IDIAZABAL CHEESE

Artzai Gazta S. Coop.

EGGS

OVO12 S. Coop.

FISH FOR CANNING

Lonjas de Bermeo, Ondarroa, Getaria y Pasaia.

4.4

Food consumption in the Basque Country and degree of self-supply

The Basque Country has two million consumers, plus a further potential 2.5 million tourist visitors per year.

Basque consumers have high purchasing power, are demanding and love quality, and for them food is a real art and way of life, a constant presence in their daily culture and their globally renowned cuisine.

Meanwhile, the tourists who visit the Basque Country have high purchasing power, and are to a great extent attracted to our region by its gastronomic and culinary offering.

All of which provides any food company establishing operations in the Basque Country with substantial domestic consumption to support its development.

The GDP per capita in Purchasing Power Parity (PPP) terms in the Basque Country in 2020 was 12% higher than the EU-27 average, and 30% higher than Spain, according to Eustat:

Average spend per person 2020	Spain	Basque Country	Basque Country / Spain
01.1T Food	1.715,19	2.063,68	1,20
01.2T Non-alcoholic beverages	124,82	98,81	0,79
02.1T Alcoholic beverages	98,77	120,25	1,22
11.1T Restaurants and canteens	626,18	803,72	1,28

The average spend per person is 20% higher on food in the Basque country than in Spain as a whole, 22% higher for alcoholic beverages and 28% higher for restaurants, according to data from the 2020 Household Budgets Survey from the INE [Spanish national statistics agency].

4.5

Quality Certification

There are 7 Designations of Origin and Protected Geographical Indications in the Basque Country:

EUSKAL SAGARDOA
NATURAL BASQUE CIDER

ARABAKO TXAKOLINA
ÁLAVA TXAKOLI WINE- BIZKAIKO TXAKOLINA / BIZKAIA TXAKOLI WINE

BIZKAIKO TXAKOLINA
TXAKOLI DE BIZKAIA / CHACOLÍ DE BIZKAIA

GETARIAKO TXAKOLINA
GETARIA TXAKOLI WINE

RIOJA WINE

IDIAZABAL CHEESE

CAVA

There are two Geographical Indications in the Basque Country:

EUSKAL OKELA
BASQUE BEEF

GERNIKAKO PIPERRA
GERNIKA PEPPERS

Certified Organic Production.

Eusko Label quality hallmark covering the following agricultural produce::

EUSKAL OKELA
BASQUE BEEF

EUSKAL BASERRIKO ARRAUTZA
BASQUE FARMHOUSE EGGS

EUSKAL BASERRIKO OILASKOA
BASQUE FARMHOUSE CHICKEN

EUSKAL ESNE BILDOTSA
BASQUE SPRING LAMB

HEGALUZZEA ETA HEGALABURRA
WHITE AND BLUEFIN TUNA

EUSKAL ESNEA
BASQUE MILK

EUSKAL EZTIA
BASQUE HONEY

ARABAKO PATATA
ÁLAVA POTATOES

IBARRAKO PIPARRAK
IBARRA GUINDILLA PEPPERS

KALITATEKO EUSKAL TOMATEA
BASQUE TOMATOES

EUSKAL BABARRUNAK
BASQUE BLACK BEANS

BASQUE LETTUCE

EXTRA-VIRGIN OLIVE OIL

BASERRIKO TXERRIA
FARMHOUSE PORK

EUSKAL BASERRI

BASQUE COUNTRY CANTABRIAN SEA ANCHOVIES

BASQUE COUNTRY CANTABRIAN SEA WHITE TUNA

Basque Agro-food Chain Control Plan ('PVCOCA')

Elika

The Basque Food Safety Foundation, is the organisation which provides expertise in order to achieve safer, healthier and more sustainable food in the Basque Country, facilitating collaboration among all agents in the Basque food ecosystem. They form a crucial part of the **Basque Country Official Agro-food Chain Control Plan**, which covers the sectors of Agriculture, Livestock, Fisheries and Food, respecting the European legal framework and the fundamental conditions established by central government, tailored to the reality of the food production systems of the Basque Country. The following standards are also in place:

- Technological Watch and Competitive Intelligence System (*Certified under Standard UNE 166006 since 2012*).
- HONcode certifications (*information quality and accuracy*).
- WIS (*Website of healthcare relevance*).



5.0

THE GLOBAL PROFILE OF THE BASQUE ECOSYSTEM: THE FOOD GLOBAL ECOSYSTEM

The Basque Country has in place an initiative entitled “*The Food Global Ecosystem*”, a public-private platform which, through public leadership, accelerates and facilitates tools and scenarios for business development through the coordination of capabilities for innovation, entrepreneurship, digital transformation and vocational training for the existing agents, and to attract talent and investment from abroad.

TFGE addresses the world as a global offering on the part of the Basque Country, but with a decentralised territorial set-up at different innovation hubs, allowing full coordination among sites, spaces, and above all services, in turn offering an opportunity for wealth, diversity of agents and improvements to the end service delivered.

TFGE: assets and value proposition

The Basque Country boasts capabilities in both the scientific and technological sphere and in the business world to focus its efforts and move into leading global positions in the food sector.

A commitment to innovation is the hallmark of the Basque Country, a commitment which has earned it recognition and resources at the European level. The Basque Country dedicates a higher proportion of its GDP to R&D than any other Spanish region: 2,08%.

It has the required potential in scientific and technological terms, and also through its renowned enterprise ecosystem, to focus its efforts and move into leading positions in the food sector.

5.1

Public reception and advice organisation

Fundación Hazi Fundazioa is an instrumental agency of the Basque Government, the functions of which lie in coordinating and catalysing strategic projects to drive the competitiveness and sustainability of the food and forestry value chain, and to revitalise the Basque Country’s rural and coastal areas.

- Provide greater professionalism, skills development, competitiveness and continuous improvement for those working in the food and forestry value chain, and in rural and coastal areas. Offer a fully comprehensive service to support them in their needs and in adapting to new challenges: entrepreneurship in new activities, operational diversification, training on demand, collaborative innovation, digital transformation of processes, etc.
- Guarantee the quality and origin of agro-food produce through control and certification, and drive and promote the various recognised brands to achieve better market positioning.
- Support the implementation of easily accessible, modern, integrated and interconnected electronic administration, capable of providing users with an agile and useful response. To improve administrative procedures, HAZI provides technical assistance and consultancy services regarding the Common Agricultural Policy, and its implementation and monitoring. It also develops and facilitates sectoral plans, and drives knowledge and innovation by public authorities through information analysis and the proposal of strategies for sectoral progress.

- Achieve balanced territorial development and drive socio-economic improvements in rural areas and those dependent on fishing, through participatory collaborative processes with local agents and administrations. To this end it offers support in the implementation of development plans and strategies, fostering territorial cohesion and social innovation.
- In accordance with the sustainable development goals, it supports projects to improve the environmental integrity of agrarian activity, and to promote the sustainable, long-term use of natural spaces by assisting in planning and management..
- Perform international monitoring tasks to track new sectoral trends and drive the development of collaborative European projects and network cooperation so as to share knowledge and challenges that are common to other regions.

As part of the **ONekin! Programme**, **HAZI** coordinates and offers the following services for companies, organisations and/or individuals developing enterprise, innovation and digital transformation projects connected with this sphere.

- Analysis, support and accompaniment in entrepreneurship, innovation, digital transformation, generational succession and enhanced competitiveness projects, with an individualised and multidisciplinary approach, provided that they are connected with the food and timber value chain, or will be undertaken in a rural or coastal area.

- Support for projects with sectoral, training, technological and market recommendations.
- Assistance in dealings with public authorities, presenting different options from among the existing programmes and grants.
- Facilitate contact and relations with agents in the value chain so as to seek out investment options, find the right location, possible distributors, etc.
- Creation of networks and contexts, fostering synergies within the ONekin! community, such as invites to events organised and/or sponsored by HAZI, or involvement at entrepreneurship days.
- Provide outreach to explain the sector to different population groups and increase sensitivity as to the need to keep the territory alive and active. Raise awareness about the work they undertake, not only in providing food, but in maintaining our history, the present and future of our land and sea, landscape and culture, and understand the right social response to this task.

Within the following spheres:



DIGITALISATION

Supporting the digital transformation of the food and wood value chain.



INNOVATION

Spaces and dynamics that seek to promote business innovation projects in cooperation.



ENTREPRENEURSHIP

Comprehensive and personalized support for project development and implementation.



FOOD INVEST IN

Promotion of technological and/or high potential investments in the territory.



TRAINING

Promoting the acquisition and permanent updating of skills and competencies.



FOREST AND WOOD

Promoting the forest bioeconomy through all links of the chain.

5.2

Basque Science and Technology Network

The **Basque Science and Technology Network** takes the form of a networked grouping of Science and Technology agents, undertaking specialised research of excellence, focused on the market and helping to generate wealth and well-being in the Basque Country.

The network is made up of 120 accredited agents: Individual Agents, Basic and Excellence Research Centres ('BERC'), University Research Structures, Cooperative Research Centres ('CIC'), Multi-focus Technology Centres,

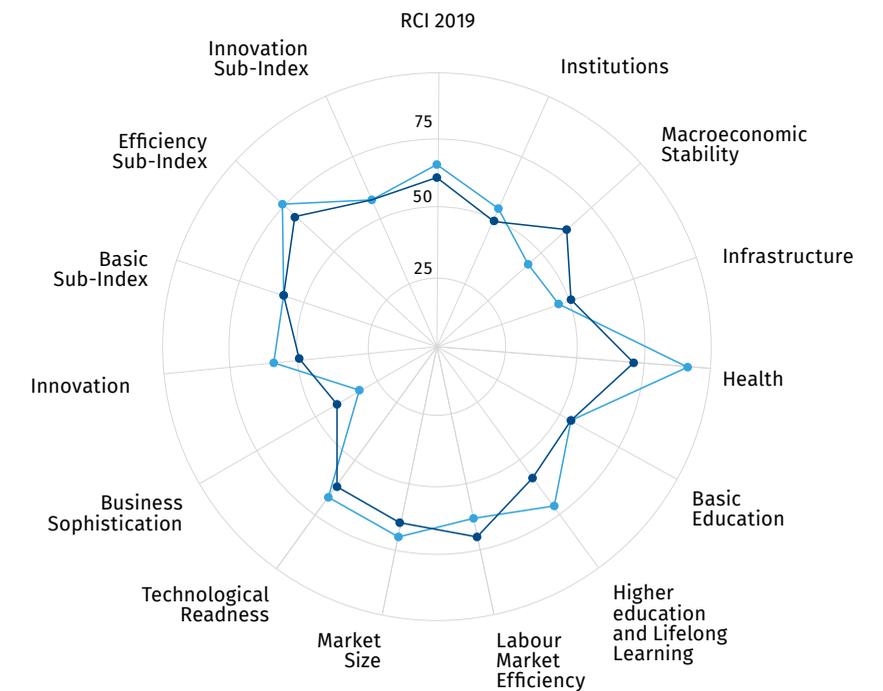
Sectoral Technology Centres, Science, Technology and Innovation Outreach Agents, Supply/Demand Brokerage Agents, Company R&D Units, Healthcare R&D Organisations and Healthcare Research Institutes.

The Basque Country boasts a comprehensive map of technological infrastructure at the service of business: universities, hospitals, research centres of excellence, cooperative research centres, technology centres, etc.

Euskadi, as the forefront in competitiveness

Regional Competitiveness Index

- EU Average
- Euskadi Basque Country Region



Specialised Technology Centres

BRTA: Basque Research & Technology Alliance

This is an alliance of 17 technology centres and cooperative research centres: Azterlan, Azti, Ceit, CIC bioGUNE, CIC biomaGUNE, CIC energiGUNE, CIC nanoGUNE, Cidetec, Gaiker, Ideko, Ikerlan, Leartiker, Lortek, Neiker, Tecnalia, Tekniker and Vicomtech, with the support of the Basque Government, the SPRI, and the Provincial Councils of Álava, Bizkaia and Gipuzkoa.

The goal is to develop research and technology in cooperation. This alliance provides a response to the socio-economic challenges of the Basque Country, on the basis of research and technology, taking into account international visibility. In other words, they collaborate to generate knowledge with the aim of transferring this to Basque society and industry, to make them more innovative and competitive. More than 3,700 researchers are dedicated to this purpose, with investment of over 300 million EUR. This serves to generate 1,300 scientific publications per year, and over 100 patents.

We would highlight in particular the following organisations belonging to the BRTA:

Neiker

A member of the Basque Research & Technology Alliance (BRTA), and a technology centre specialising in the creation of innovative solutions for the agro-livestock and forestry sectors. The main operational approaches of NEIKER focus on promoting agriculture 4.0 within the sector, developing the sustainability and competitiveness of farms, the search for alternatives to mitigate the effects of the climate emergency in agriculture and livestock farming, and support for the bioeconomy. While constantly incorporating the One Health focus: a horizontal approach to the interrelationship between the health of animals, the environment and people. Furthermore, as a dependent body of the Basque Ministry of Economic Development, Sustainability and the Environment, NEIKER focuses its work on responding to and supporting the strategies designed by the Basque Government for the promotion, development and administration of the agro-livestock and forestry sector.

Azti

A science and technology centre belonging to the Basque Research & Technology Alliance (BRTA), undertakes high-impact transformation projects with organisations aligned with the United Nations SDGs for 2030. Its goal is to drive a positive change for the future of the population, contributing to a healthy, sustainable and fully realised society. They specialise in the marine environment and food, providing cutting-edge, value-added products and technologies based on sound science and research.

They enjoy a consolidated position in the top 10 of the world's leading institutions in terms of their scientific output Quality Index. They also take part in, and even lead, a number of Europe's most important scientific committees. This is furthermore a specialised technology centre of excellence which fulfils the RVCTI indicators and CIT registration.

Leartiker

Has the vision of adding value to the enterprise ecosystem through its R&D+i activities, and appropriate transfer in the field of Food Technology and Polymer Technology.

With an international vision, based on a collaborative relational model; undertaken by people committed to the generation of knowledge, value and sustainable work, mainly at the local level. It accompanies companies in the development of new products, advising and supporting them in the search for new business opportunities, and in improving and diversifying their products.

Leartiker belongs to the Basque Science and Technology Network ('RVCTI') and forms part of the project of Lea Artibai Ikastetxea S.Coop. and Corporación MONDRAGON.

5.4

Other Technological Platforms

Tecnia

Is the largest applied research and technological development centre in Spain, a European flagship and member of the Basque Research and Technology Alliance.

They collaborate with companies and institutions to improve their competitiveness and people's quality of life, and to achieve sustainable growth.

Tekniker

Offers the **IK4 RESEARCH ALLIANCE**, a private technological partnership comprising six Technology Centres. Its mission is to generate, attract and transfer scientific and technological knowledge so as to help improve the competitiveness of the surrounding enterprise ecosystem through innovation, within a global context defined by competitiveness.

The Basque Country is also home to Cooperative Research Centres ('CICs'). There are currently seven such CICs, named bioGUNE, biomaGUNE, nanoGUNE and energiGUNE.



5.5

Other entrepreneurship support services

The Basque Country is an industrial and entrepreneurial area, within a context laden with opportunities, with industrial expansion against a favourable economic backdrop, and with rising exports over recent years.

Cooperation agreements have also been established with other European regions in different operational spheres: R&D+i, environment and sustainable development, agriculture and food, etc.

Basque Culinary Center (or BCC)

Has, since it was founded in September 2011, comprised a unique ecosystem in which training, innovation, research and entrepreneurship coexist, with the goal of developing and promoting gastronomy, in the sense of reasoned knowledge about what and how we eat. It is a pioneering institution made up of the Faculty of Gastronomic Science and BCC Innovation, the Technological Centre for Gastronomy.

The board of trustees of Basque Culinary Center is made up of chefs, institutions and businesses, and serves as the organisation's administrative body. Meanwhile, the International Council of BCC involves the leading chefs at the international level.

As an organisation, Basque Culinary Center shows responsibility in addressing the challenges facing society. It has a Strategic Sustainable Development Plan in place, aligned with the challenges set by the SDGs, which incorporates the organisation's equality plan.

University and vocational training

BIC - Business Innovation Centre

The Basque Country has 4 BICs (Business Innovation Centres), dedicated to supporting enterprises and business projects that encapsulate an innovative project (*regarding processes, products, commercial strategy, etc.*) and that in general revealed a high level of qualifications among both their founders (*individually or collectively*) and their workforce. They provide advice in the search for economic, technological and training resources, in any feasibility study that might be required, or in identifying public grants. They likewise provide spaces for the development of new activities.

The BIC - Business Innovation Centres of Álava, Bizkaia and Gipuzkoa promote the creation and incubation of innovative, tech-based enterprises. They offer a location tailored to the needs of new projects, administrative and technological guidance, opportunities to access seed capital, preferential financing terms in cooperation with various agents, and access to institutional support programmes. Since they were first launched, these Centres have supported the creation of 2,000 enterprises, generating 10,500 jobs, and guiding more than 4,000 entrepreneurs.

www.bicaraba.eus

www.bicgipuzkoa.eus

www.bicbizkaia.eus

Accelerators

Culinary Action! CA! Is the BCC accelerator, which has since 2014 supported 74 entrepreneurs driving the future of food through the development of products with a high component of innovation (*processes, raw materials, output...*) or ancillary industry technologies (*machinery, software, technical aspects...*).

The **EIT FOOD** accelerator speeds up innovation to build a food system tailored to the future, producing healthy and sustainable food for all.

The public-private open innovation programme **BIND 4.0** also has a Food strand promoting innovation in the value chain. This initiative has the twofold aim of encouraging the digital transformation of the industry, while at the same time accelerating the consolidation of innovative ventures through a model of collaboration between big business and start-ups. Since 2016, BIND 4.0 has accelerated a total of 200 projects, developed by over 130 start-ups across its five editions. 2021 saw the creation of the SME Connection initiative, focused more on small and medium enterprises.

48.9% of young people in the Basque Country have higher education. The training and excellence of its people represent a key strategic factor in the competitiveness of the Basque Country.

The Basque Country has a higher concentration of qualified engineers per capita than any other region in Europe (*39.7/1000 inhabitants*)

Training is the key that opens the door to a competitive future. The Basque Country thus focuses its efforts on developing a clear and approachable educational model, delivering value and guaranteed quality. It has strengthened its commitment to developing people's talent, as an incubator bringing together highly qualified future professionals ready to pilot the future, both locally and internationally. 48.9% of those aged between 30 and 34 have completed higher education, a higher percentage than the average for the European Union (37.9%) and for Spain (42.3%).

With a public university which accounts for eight out of every ten students, three private universities, almost a hundred Vocational Training centres, five international schools, a dozen or more official language schools, the world's first Gastronomic University, the Basque Culinary Center and DigiPen, Institute of Technology Europe-Bilbao, the Basque Country invests more per student and in educational classroom technology than any other Spanish region. The list of universities currently comprises:

Public universities

Public University of the Basque Country, UPV/EHU

- Public university.
- Three campuses: Álava, Bizkaia and Gipuzkoa.
- 30 faculties and schools.
- 70 degree courses, 2 double degrees, 130 master's courses, 38 internal qualifications and 65 doctorate programmes.
- Responsible for 70% of research in the Basque Country.
- International excellence.
- Campus: Euskampus.
- 48,380 undergraduate and postgraduate students.
- 5,019 lecturers and researchers.
- International Campus of Excellence: Euskanpus.
- Dual vocational training.

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- Public university.
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Private universities

Mondragón University

- Private university belonging to Corporación MONDRAGON .
- 3 faculties and higher technical school.
- 25 degree qualifications linked to the field of Engineering, Business, Education, Humanities and Gastronomic Science (*Basque Culinary Center*).
- 4,000 students.
- 385 teachers.

Deusto University

- Founded in 1886 by the Society of Jesus .
- Private university .
- Three campuses in Bilbao, Vitoria-Gasteiz and San Sebastian.
- 6 faculties.
- 5,979 students enrolled for official qualifications.

- Offering of 1 university master's and 14 professional master's courses, 8 university specialisation diplomas, 10 university expert courses, 2 degree and 4 degree adaptation courses, along with various short-duration courses, both in-person and online, in the fields of communication, accounting and finance, culture and society, business and organisational administration and management, project administration and management, industrial design, social economy and cooperatives, education, electronics and energy, strategy, entrepreneurship and innovation, gastronomy, industrial management and organisation, information technology, telecommunications and embedded systems, mechanical engineering and manufacturing processes, leadership and people management, and marketing and sales.

University of Navarra – Tecnun

- Founded in 1961.
- Private university.
- Campus in San Sebastian.
- Engineering school: 9 degree courses aligned with the EHEA.

Vocational Training

The Basque Country's Vocational Training system is the EU's first test bed for the introduction of applied innovation apprenticeships. There are more than 140 training pathways, as this is a strategic aspect of the Basque Government agenda, since 65% of jobs require this type of vocational certification.

Particular mention should be made of the Dual Training System, which combines apprenticeship processes at a company and at the training centre, with the following results:

- Train qualified people tailored to company needs.
- Help companies hire staff aligned with their specific needs.

Tknika

Tknika is the vocational training innovation centre. Through a networked approach and the engagement of vocational training tutors, this centre draws its inspiration from the world's most advanced models, in developing innovation projects linked to the fields of technology, training and administration.

5.7

Enterprise cluster

Basque Food Cluster

With the goal of further stimulating and enhancing the competitiveness of the food sector in the Basque Country, the cluster strives to make the region's food sector dynamic, creative, innovative, excellent, internationalised, sustainable, competitive, and recognised as a generator of jobs and wealth. The Food Cluster helps to increase the competitiveness of Basque companies in the food sector, providing platforms for meetings and networking, stimulating and promoting cooperation and the development of shared, value-added projects, while also facilitating dialogue with other agents.

5.8

Other related public support services

Elika

ELIKA is a Basque Government organisation contributing expertise to achieve safer, healthier and more sustainable food in the Basque Country, by facilitating collaboration among all agents in the Basque food ecosystem.

ELIKA pursues 4 strategic goals:

1. It supports the definition and deployment of food policies in the Basque Country.

- Facilitating expertise as the basis for Food Safety decision-making.
- Driving and catalysing plans and programmes to improve Food Safety.
- Advising on the development and deployment of regional regulations.
- Supporting the administration and communication of agro-food alerts.
- Participating in interdepartmental and interinstitutional projects connected with Food.

2. It extends the food safety culture and assists the sector in the transition to sustainable agro-food systems.

- Facilitating forums with agents in the food chain to support the implementation of the Farm-to-Fork Strategy.
- Reinforcing the advice service for food chain agents.
- Developing and maintaining resources to facilitate the application of food policies.
- Organising and/or participating in skills development initiatives.

3. It empowers Basque society to reach decisions about food.

- Generating a food education strategy focused on consumers.
- Aligning technical knowledge with the sector and public authorities.
- Managing platform and information network infrastructure, and a uniform editorial approach.

4. It drives a distinctive, advanced and innovative organisational model.

- Optimising Technology Watch and Competitive Intelligence functions.
- Managing internal talent at Elika.
- Fostering strategic cooperation and collaboration relationships.
- Advancing the Management Model.



Basque Energy Agency (EVE)

In 1982 the Basque Government set up the Basque Energy Agency (EVE), and laid the foundations of an energy policy based, to varying degrees across different periods, on energy efficiency, energy source diversification, and the promotion of renewable energies.

It has a twofold mission: first to **refocus Basque Energy Strategies** in accordance with the criteria of guaranteed supply, cost competitiveness, sustainability and technological development. Furthermore, **actively participate in such development** and contribute to the achievement of the targets defined.

SPRI

To this end the EVE **assists the Ministry of Economic Development and Competitiveness** of the Basque Government, develops initiatives in the field of energy and geological/mining resources, and **participates in projects involving companies and institutions**. It also conveys to society the values and messages guiding its strategies, basing its operational capacity on **people's technical qualifications, commitment and leadership**, and on the efficient management and planning of resources.

This is the agency of the Ministry of Economic Development, Sustainability and Environment of the Basque Government for the promotion of Basque industry.

It works together with companies to facilitate access to numerous areas, optimising the establishment and/or expansion of businesses, locally and even internationally.

It supports Basque enterprise in 8 strategic areas:



Through its specialised initiatives and companies:

01.
Spri Enterprise Development Agency
Grants and instruments to promote Basque enterprise.

02.
Basque Trade & Investment
Basque Internationalisation Agency, covering all forms of technical and economic support, with its own network of more than 17 offices, and a presence in over 80 countries.

03.
Sprilur
Industrial units, land, buildings and offices.

04.
Venture Capital Management in the Basque Country
Economic support for SMEs, investment funds, and financial consultancy..

05.
Business and Innovation Centres (BICs)
Facilitating the process of setting up new, innovative enterprises.

06.
Basque Cybersecurity Centre
Strengthening the professional sector and offering a response to IT attacks.

07.
Invest In Basque Country
Support for foreign investors in their deployment.

Ihobe

Ihobe, is a public enterprise attached to the Ministry of Economic Development, Sustainability and Environment of the Basque Government, with the aim of improving the environment, integrating environmental criteria within sectoral policies as an element of sustainable competitive value of the Basque Country and its organisations. They specialise in promoting the spheres of soil protection, the circular economy, climate change and sustainability, as well as biodiversity.

Basque Green Deal

Basque Green Deal is the strategy set out by the Basque Government in alignment with the European Green Deal. The core strands of this economic and environmental roadmap are: Climate ambition, Clean, secure and affordable energy, Circular economy, Energy efficiency and sustainable construction, Sustainable mobility, Farm to fork, and Zero pollution.

Innobasque

Innobasque is a distinctive agent of the Basque Science, Technology and Innovation Network, set up on the initiative of the Basque Government to assist it in the design, implementation and promotion of new innovation policies.

Given their diversity and number, the entities belonging to Innobasque are highly representative of the Basque Science, Technology and Innovation System, accounting for 62% of Basque R&D+i investment.

Innobasque has almost 1,000 member organisations, including companies (51%), public authorities (12%), educational institutions (11%), scientific and technological agents (9%), intermediary agents (7%), social entities (6%) and individual members (5%).

It should be emphasised that 91% of companies belonging to Innobasque are SMEs, and 89% operate in strategic RIS3 sectors.



6.0

CONNECTIVITY AND LOGISTICS

The Basque Country enjoys a strategic location at the heart of the European Atlantic Corridor. This location, as a point of transit between the markets of the Iberian peninsula and the rest of Europe, makes the region the hub of a catchment area embracing:

- A 2,000 km corridor linking more than 10 EU regions.
- A population of 80 million, 25% of the inhabitants of the Eurozone.
- Over 2 trillion euros of GDP, representing 30-40% of Eurozone GDP.
- A corridor linking more than 60 ports, with total traffic in excess of 650 million tonnes/year.

Its location and a network of first-class, fully coordinated logistics infrastructure and transport, interconnected at the local level and with major European networks, make the Basque Country an unrivalled Multimodal Logistics Platform for the transport of goods and people in south-western Europe.

The Basque Country is the gateway to Europe as a logistics hub for the European Atlantic corridor and the rest of the world, in particular Latin America, where Basque companies and institutions have a significant presence.



6.1

Infrastructure to set up operations

The **Port of Bilbao** is one of the most important logistics centres on the Atlantic route providing access to the European market. Its offering of regular maritime services links it to 800 ports worldwide. Covering an area of 350 ha of land, the Port is home to logistics operators specialising in the different multimodal transport chains, and such varied sectors as petrochemicals, commodities, food produce, steelmaking and more.

The Port of Bilbao handles freight of all kinds, and every class of ship. It is open and operational 24 hours a day, every day of the year, with no draught or tidal problems.

The **Port of Pasaia** is a natural port comprising a bay which provides ships with complete shelter. This means that loading and offloading operations can be performed in complete safety throughout the year, whatever the sea state.

As well as the ports, we would highlight:

Vitoria-Gasteiz airport (one of the most important freight airports in Spain, and the DHL HUB for southern Europe).

Bilbao international airport, the largest in the north of Spain, with flights to the main European cities (handling over 4 million passengers per year).

San Sebastian airport (located in Hondarribia).

The Basque Country also has a new high-speed rail network, fully modern and extensive highways, etc. which make up its integrated multimodal infrastructure network.

6.2

Strategic zones

The Basque Country's Science and Technology Parks are a key instrument in helping companies to establish their initial operations. The Álava, Bizkaia and Gipuzkoa Parks, three projects covering a total of 6 campuses, are home to research centres, technology centres, innovation drivers and a broad selection of the most advanced and cutting-edge Basque companies.

The Parks constitute a flagship institution for researchers in the most notable industrial fields, a place where nearly 5,000 people dedicate their efforts to R&D+i. They offer an outstanding location, in sustainable, high-quality settings. Activities connected with the Technology Parks represent 5.5% of GDP, 5.4% of employment, and 5.8% of corporate tax take. The Technology Parks of Álava, Bizkaia and Gipuzkoa are home to nearly 430 companies, employing around 16,000 people, with a combined turnover in excess of 4 billion euros.

6.3

Logistics areas

The Basque Multimodal Logistics Platform Network, comprising Arasur, Júndiz-Foronda and Pasaia-Irún, provides a comprehensive and well-structured response for freight transport, resulting in a considerable competitive advantage.

ARASUR (RIBABELLOSA/ÁLAVA)

Unbeatable connections:

- Surface area: 200 ha (1 million m² of logistics warehouses).
- Included within the EU Catalogue of Freight Rail Corridors.
- Rail Connections:
 - Madrid-Irún-Paris, Lisbon-Irún-Paris, Bilbao-Barcelona, Bilbao-Madrid.
 - A-1/AP1 Irún-Madrid, AP68 Bilbao-Zaragoza, E-70 and E-80.
 - Enabling transfers of road freight to rail on a dual North-South/East-West axis.
 - Serving the Port of Bilbao.

JUNDIZ (VITORIA-GASTEIZ)

Comprehensive and integrated solutions:

- Surface area: 48 ha.
- Location: Direct access to the A-1 and N-1, European route E-70, Madrid-Paris.
- Madrid-Hendaia-Paris railway.
- Connected to Foronda airport, an air freight hub for the north of the Iberian Peninsula.
- This is an intermodal point of transfer between air, road and rail hubs.
- Access to the future international gauge New Basque Country Rail Network.
- Serving the port of Bilbao and Pasaia.
- Connected to ADIF's Júndiz Intermodal Terminal: 718,141 m².
- Located within the Júndiz Industrial Park (7,000,000 m²).
- 120,000 m² of industrial plots with a rail branch line.
- 3 Quality Hallmarks: ISO 9001, ISO 14001 and OHSAS 18001.
- Direct access from: AP-1/A-1/E-80/E-05/N-1/AP-68/E-804.

PASAIA-IRÚN

One single rail convergence centre:

- Included within the EU Catalogue of Freight Rail Corridors.
- Alongside the Port of Pasaia.
- Triple Iberian – UIC – metric gauge.
- With access: Paris-Madrid corridor (N-1 & A-8/AP-1) – A-8; Access to Navarre and the Ebro Valley – A-15 motorway.
- This will comprise an intermodal rail transfer point between gauges (Iberian, UIC and metric).
- It will allow the transfer of rail traffic on the North-South axis and towards Navarre-Ebro Valley.

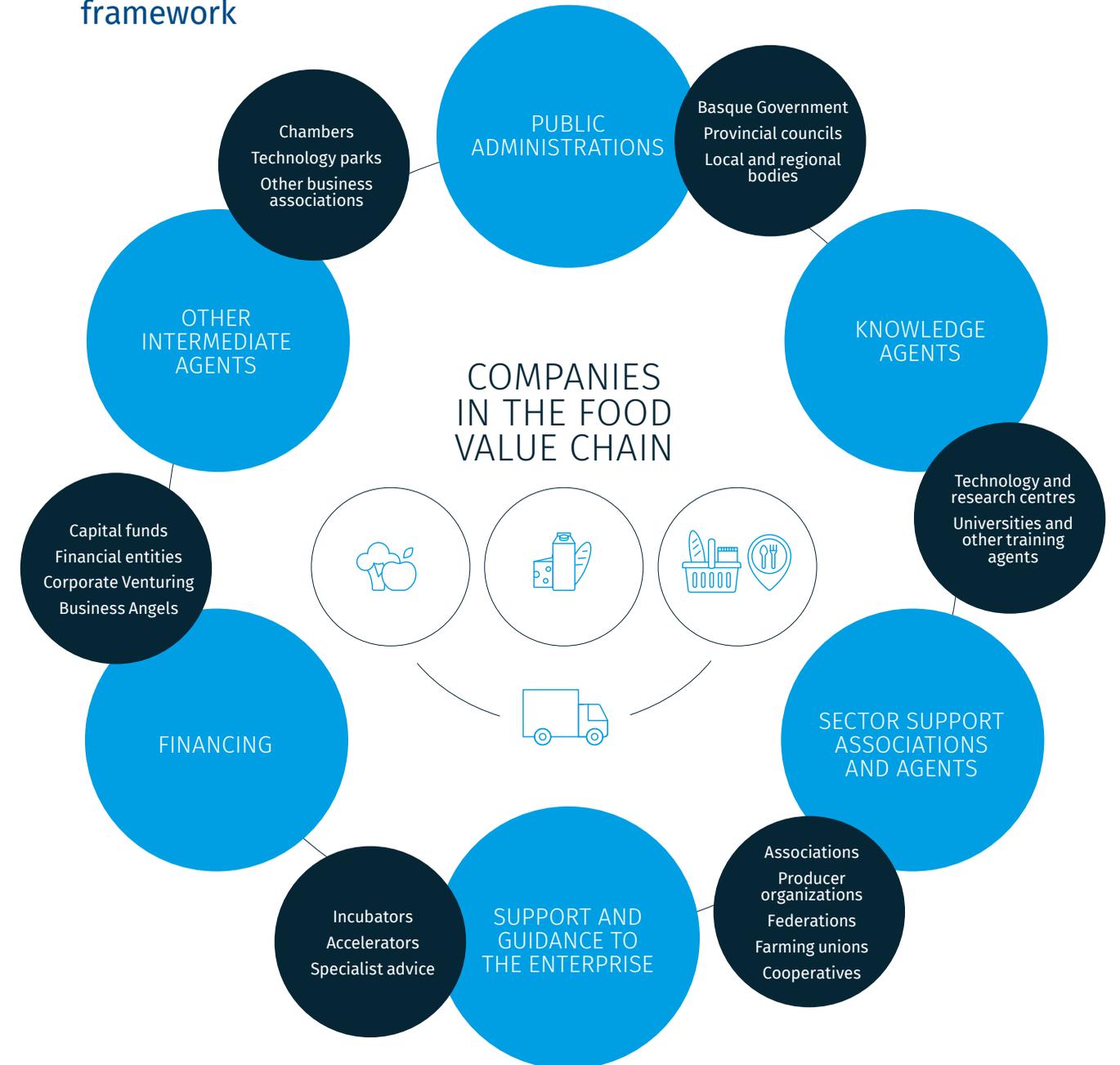
One particularly notable feature of the Basque Country's great logistics offering is **VIAL – Vitoria Álava Solución Logística**. Covering more than 9 million square metres, the premier logistics space in south-western Europe, aiming to serve as a key link in the logistics chain.

7.0

INSTITUTIONAL SUPPORT

7.1

Institutional framework



7.2

Public investment grants

Lehiatu Berria

Grants for the processing and marketing of agrarian and food produce, and produce derived from fishing and aquaculture. The grants will correspond to a programme of investments, which may be annual or multi-annual, depending on the implementation period of the project presented, and when the payments are made.

There are five lines of grants:

1. Grants to make investments in the processing, marketing or development of agricultural produce.
2. Grants to make investments in the processing and marketing of forestry products.
3. Grants to make investments in the processing and marketing of fishing and aquaculture produce.
4. Investments in agrarian and food industries in the Basque Country not covered by the previous points.
5. Investments in the processing and marketing of organic produce.

Lehiatu Promoción

Support for investments in different sectors/projects:

1. Investments focused on the processing, marketing or development of produce of agricultural origin.
2. Investments focused on the processing and marketing of products of forestry origin.
3. Investments focused on the processing and marketing of fishing and aquaculture produce.
4. Investments in agrarian and food industries of the Basque Country not covered by the previous points.
5. Investments in the processing and marketing of organic produce.

OCM Winemaking Sector Investment

Grants intended to improve the overall performance of companies in the winemaking sector and their adaptation to market demands, as well as increasing their competitiveness. Financial support is also given to tangible or intangible investments in winemaking infrastructure and processing installations, as well as marketing instruments and structures, including those intended to improve energy savings, overall energy efficiency, and sustainable processes.

Ardoa Inb

Support intended to support investment projects in the winemaking sector that could not be covered by the OCM Investment 2022 funding round conducted in accordance with Regulation (EU) No. 1308/2013 of the European Parliament and of the Council, regarding national programmes to support the winemaking sector, and Royal Decree 5/2018, of 12 January 2018, for the application of measures under the 2019-2023 Spanish winemaking sector support programme.

OCM Promoción

Support intended to increase the competitiveness of winemaking produces and consolidate the quality of wines through grants for actions and programmes for information and promotion of wine products in third-country markets.

Fomento Basque Wine

Grants intended for winemaking SMEs for promotion on the domestic market (*Spain*).

Gastrobikain

Support intended to provide economic support for gastronomic initiatives deemed strategic in the food and gastronomy sector, through two lines of investment:

1. New gastronomic businesses on the part of recently qualified personnel.
2. Consolidation of excellence on the part of restaurant businesses of established standing.

ONekin!

Grants supporting companies and individual entrepreneurs in the food and timber value chain, covering part of the non-recurrent costs derived from specialist consultancy in the field of entrepreneurship, innovation and digital transformation.

BERRIKER R&D+i grants

Grants intended to stimulate and incentivise research, development and innovation in the agrarian, forestry, and fishing & aquaculture produce sectors of the Basque Country.

Cooperation

Grants intended to foster cooperation between at least two organisations, for the development of the following within the agrarian, food and forestry sphere: creation and functioning of Operational Groups of the EIG: develop new products, practices, processes and technologies; organise joint processes and share installations and resources among small-scale agents; market and promote products among distribution chain agents; develop joint implementation actions for climate change adaptation or mitigation; sustainable supply of biomass for food production, energy generation and industrial processes.

Digital Transformation of Food

Support the inclusion and encouragement of the digital transformation of the food and timber chain in order to improve competitiveness and optimise resources, by means of twofold assistance:

- Processes to initiate digital transformation, through the incorporation of digital systems.
- More advanced digital transformation processes through the incorporation of technology 4.0.

Ikertalent bursaries

Training of research staff to complete doctoral theses, along with technological staff, through incorporation and participation in R&D+i projects to be undertaken in scientific and technological areas, markets, marketing and business organisation in the agrarian, fisheries and food sector of the Basque Country, through two programmes:

- Research staff programme: 12 bursaries.
- Technological staff training programme: 10 bursaries.

Bioeconomy

Seek to stimulate and incentivise innovation projects conducted in the field of the bioeconomy, through two lines:

- Line 1: grants to develop pilot projects.
- Line 2: grants for the development of demonstration projects.

Sendotu

Loans with beneficial collateral for investment in capital goods by companies in the food and timber value chain.



Investment funds

Easo Ventures

The private venture capital firm based in San Sebastian with various funds on the market.

Talde Capital Riesgo

A group managing more than 350 million euros, assigned to both Private Capital and Private Debt, along with a further 150 million euros at the capture phase for new Private Debt and Real Estate strategies.

All Iron

The investment tool promoted by Jon Uriarte and Ander Michelena, the founders of 'Ticketbis'. Its operational sphere extends beyond the Basque Country, and its team now includes Robert Nowak, the figure behind investments such as Delivery Hero. All Iron has a fund of 66.5 million euros which has acquired stakes in 30 companies and is looking to double this number for the 35 million it still has available for continued investment.

Corporación Mondragón

The Mondragón Group, which comprises 91 cooperatives and their 141 subsidiaries, has allied with four banks (*Laboral Kutxa, BBVA, Santander, Caixabank*) and the Basque Government to set up the Mondragón Development venture capital fund. This new instrument will invest in grow-

ing companies, having been set up in 2020 with resources of 30 million euros. Overall, its managers aim to lend momentum to 30 businesses over the next four years, with investments of up to 5 million euros.

ABE Capital Partners

Private capital fund manager focused on long-term investment in small and medium-sized enterprises with high potential for growth.

The target set is to reach a figure of 200 million euros to develop enterprises with "Major prospects", the commitment being that 50% of the companies must be in the Basque Country.

Family Office investments

The investment offices of businesspeople and families are becoming increasingly important in this search for opportunities. These are businesspeople and asset managers with net worth seeking out alternatives to generate returns and allow the development of ideas with a future. Those operating in the Basque Country include such major players as Onchena, which manages the assets of the Ybarra Careaga family, and has played a lead role in such major corporate operations as those of MásMóvil, in the acquisition of the stake by KKR, Cinven and Providence, or more recently Solarpack. We would also highlight Eneko Knorr.

Funds with a public hallmark

Other options for investors and businesses are being developed thanks to institutional initiatives.

Hazilur Basque Fund for the Food and Timber Sector This is a public-private initiative focused on senior debt.

Another publicly supported option is the Bizkaia Provincial Council initiative '**Bizkaia Seed Capital**' of **Elkargi**, which also undertakes operations of note through its innovation fund.

Without overlooking **SPRI Venture Capital**, founded by the Basque Government in 1985 through SPRI to promote and develop Venture Capital activity in the Basque Country.

More focused on the management of employment pension schemes, we have **Geroa**, an investment fund promoted by the Business Association of Gipuzkoa, Adegí, and its employment pension scheme.

Similar work is also performed by the employment pension schemes for Basque Government civil servants, **Itzarri**, and for the employees of the Provincial Councils and Local Authorities, **Elkarkidetza**.



Incentives and tax deductions

The Basque Country enjoys a high degree of self-government in such major matters as health, education, security, housing and public finance, this autonomy being derived from the Statute of Gernika, one of the cornerstones of its self-government system.

Another cornerstone of Basque autonomy is the “Economic Agreement”, the financial support of the autonomous region which grants autonomy to Basque institutions to tax the population and administer the tax take in accordance with their own budgets and the agreements signed with Spain’s central government.

All these circumstances have allowed the creation of such independent bodies as EITB - Basque Radio and Television; the Ertzaintza autonomous police force, with more than 8,000 officers, along with full responsibility for road and water infrastructure, economic and industrial development, and territorial regulation and formation.

In terms of taxation, the Basque Country thus has its own regulatory and administrative capacity thanks to its own financial system. The Basque public authorities have developed different instruments to promote business development and enterprise creation, as well as R&D+i projects: specific public funds for each stage of the life-cycle of an enterprise, proactive private funds to invest in enterprise, tax deductions and incentives.

The Basque Country applies both economic and taxation measures in order to establish its own economic ecosystem, with overall links to Public Incentives and Deductions for Research and Development, Innovation, Investments, Employment, etc. This means:

ZERO UNCERTAINTY

- Tax queries.
- Advance payment proposals.

PROXIMITY AND AGILITY The Provincial Council is a more agile and socially engaged administration, thanks to local characteristics.

AVOID DOUBLE TAXATION It benefits from conventions to avoid double taxation signed by Spain with other countries.

TRANSPARENCY The Basque Tax Office defines itself as a TRANSPARENT TAX AUTHORITY.

- Tax benefits and incentives for posted workers who take up residency.
- First-class destination from the taxation perspective, in particular for companies engaged in R&D or IT projects, and for highly qualified workers.

SPECIFIC PUBLIC FUNDS FOR EACH STAGE OF THE COMPANY LIFE CYCLE

Refundable advances.	Occupational training.
Low interest loans.	Subsidies for R&D projects.
Tax incentives.	Installation in Technology Parks.

PRIVATE FUNDS PROACTIVE TO INVESTING IN BUSINESSES

Reciprocal guarantee companies.	Specific funds.
Financial institutions.	Business Angels network.
Social entities.	Seed funds.

TAX INCENTIVES AND DEDUCTIONS*

**More advantageous than in the rest of the State.*

General taxation: 28% - 24% for SMEs

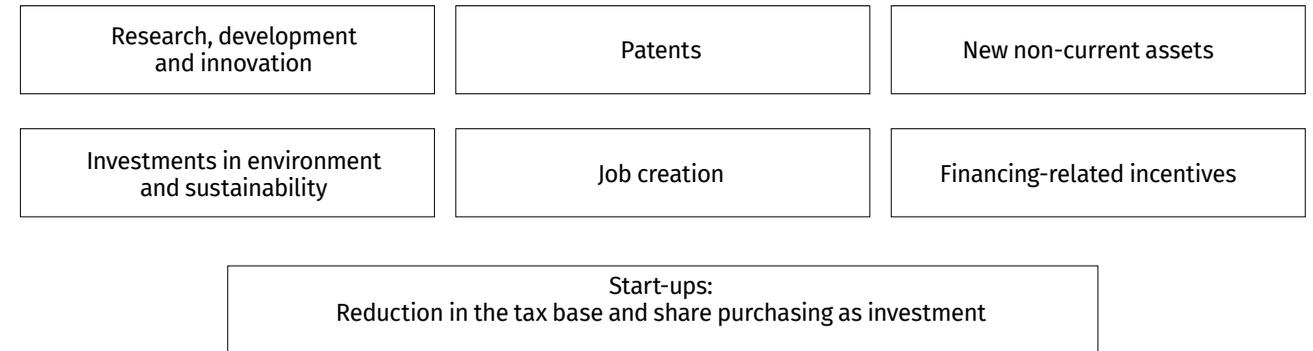


Table summarising the deduction for investments in micro-enterprises, SMEs, innovative enterprises and those connected with the Silver Economy:

RENTA 2022	GIPUZKOA		BIZKAIA Y ARABA	
	Micro + SME	New or recently founded	Innovative	-
Type of Enterprise	Micro + SME	New or recently founded	Innovative	-
% Deduction	10%	15%	20%	25%, or 30% if innovative or silver economy
Maximum annual base	100.000 EUR	150.000 EUR	200.000 EUR	-
Maximum period for acquisition		5 years	7 years	5 years, or 7 if innovative*
Lock-in period		5 years		
Relationship	Stake of related shareholders limited to 25%			

* The 7-year duration is not enforceable when investing in entities that require an initial venture capital investment in order to break into new geographical markets or new products that represent more than 50% of the average annual turnover of the past 5 years.



8.0

A GREAT PLACE TO LIVE

Tradition and innovation, prehistory and the cutting edge, green and blue. The Basque Country has its own perspective on the world, looking out from this small land suffused with colours, smells and flavours, inviting people to visit, explore, enjoy unique experiences.

The Basque Country boasts a high quality of life, with its own education system and extensive knowledge of international languages. It also has an advanced, public and universal health system, making it one of the very best in Europe.

The Basque Country is a unique place, both in social terms, and in the economic, industrial and cultural sense. Balanced social and economic development, the pursuit of excellence, urban transformation processes, internationalised companies and a firm commitment to innovation and to being among the best in the world, make the Basque Country one of the most attractive places to live and to invest.

It has extensive healthcare infrastructure covering the needs of the population through the Basque Health Service-Osakidetza, a public service run by the Basque Government, as well as private institutions. Under the Basque Education System, schooling is compulsory from the age of 6, and free between the ages of 3 and 16. The Basque Country has the lowest educational dropout rate among youngsters aged between 18 and 24 (6.5%). As for security, it is one of the safest parts of Europe, with a rate of 26.83 criminal offences per 1,000 inhabitants.

Culture

The Basque Country keeps alive its own language, **Euskera**, the oldest in Europe and the key hallmark of its distinctive, individual culture.

Culture runs through every inch of the Basque Country, with such leading festivals as the San Sebastian International Film Festival, the Vitoria-Gasteiz, Getxo and San Sebastian Jazz Festivals, and the Bilbao opera season. Rioja Alavesa, a unique region. Reds and ochres give colour to this land, its wines and villages. Traditional wineries, and others dreamt up by leading architects, producing wines under a designation recognised as one of the finest in the world.

Tradition and innovation merge in an amalgam of shapes and colours. To discover the Basque Country is to discover its people, a way of life, of being and understanding, combining history and modernity, daring and nobility, fiestas and hard work.

Gastronomy

Arzak, Berasategi, Subijana, Atxa, Aduriz and a long list of other premier chefs have given the Basque Country 33 Michelin Stars, a higher concentration than any other region in the world.

BCC, Basque Culinary Center, is the world's first gastronomic university, a Food and Gastronomy Research and Innovation centre, the key initiative in guaranteeing the continuity of cuisine as a hub for innovation, the generation of first-class knowledge and the training of qualified professionals.

Nature

The mountains and valleys of the Basque Country, and the villages that dot them, reflect millennia of history and traditions that remain alive to this day, an unrivalled natural setting with every shade of green to the fore, shaping life itself.

The Basque Coast comprises 250 km of beaches, estuaries, marshland, cliffs and fishing villages, which speak of a landscape both striking and bountiful at once, a living and intensely blue sea. One prominent feature of this coastline is flysch, a quirky geological formation dating back millions of years, which provides information about biological, geological and climatic changes over the past 50 million years.

Sports and Traditions

The Basque people have often made their free time an extension of their work. Which is why all forms of rural sport in the Basque Country are connected with a trade or the typical tasks performed on the farm. Meanwhile, traditional sports such as Basque pelota (Jai-Alai), rowing and cycling are among the key fixtures on the annual sporting calendar, as well as more international sports such as football, basketball, golf and surfing.



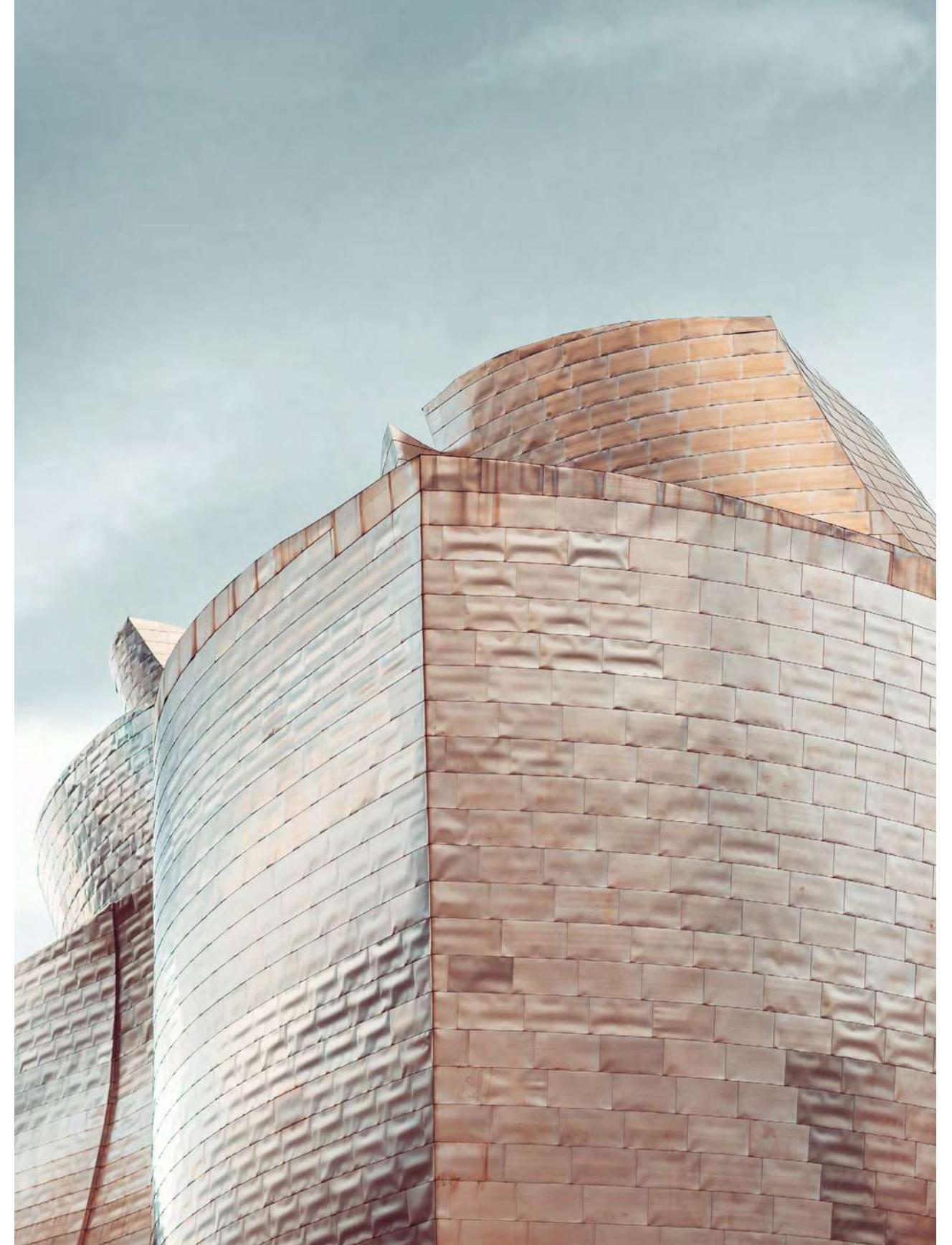
Art

From the most ancient artistic expressions to the most avant-garde museums, the Basque Country boasts treasures of incalculable value, giving it a unique personality. It is home to thematic museums linked to the land's economic development, such as the Railway and Mining Museums; such internationally famous institutions as San Telmo, the Museum of Fine Arts, and those which have placed the Basque Country on the global map in particular:

the **Guggenheim Museum Bilbao** is one of the most ambitious cultural projects of the 20th century. It opened its doors in 1997, serving as the precursor to the city's complete transformation. It is the symbol of the new Bilbao. Its permanent collection includes essentially the works of the leading artists of the last four decades, supplemented by collections loaned by the Solomon R. Guggenheim Foundation, and the special programmes organised by the Foundation.

Cristóbal Balenciaga Museoa is dedicated to the famous fashion designer from Getaria, considered a genius of international haute couture. The museum comprises two buildings: the Aldamar Palace, built in the 19th century, and home to temporary exhibitions and the documentation centre; and the new annexe. The Cristóbal Balenciaga Museoa collection comprises some 1,600 exhibits, and is not only the largest collection of Balenciaga's creations in the world, but also the most significant.

Artium is a museum and cultural centre dedicated to collecting, producing, showcasing, researching and presenting contemporary heritage, teaching people about contemporary culture and facilitating the development of experiences focused on creation in the modern world. Through the experience of art and today's culture, Artium develops a critical awareness of society, and projects an image of Álava and Vitoria-Gasteiz as contemporary and committed to art and culture.



EUSKADI

BASQUE COUNTRY

EUSKO JAURLARITZA



GOBIERNO VASCO

EKONOMIAREN GARAPEN,
JASANGARRITASUN
ETA INGURUMEN SAILA

DEPARTAMENTO DE DESARROLLO
ECONÓMICO, SOSTENIBILIDAD
Y MEDIO AMBIENTE