

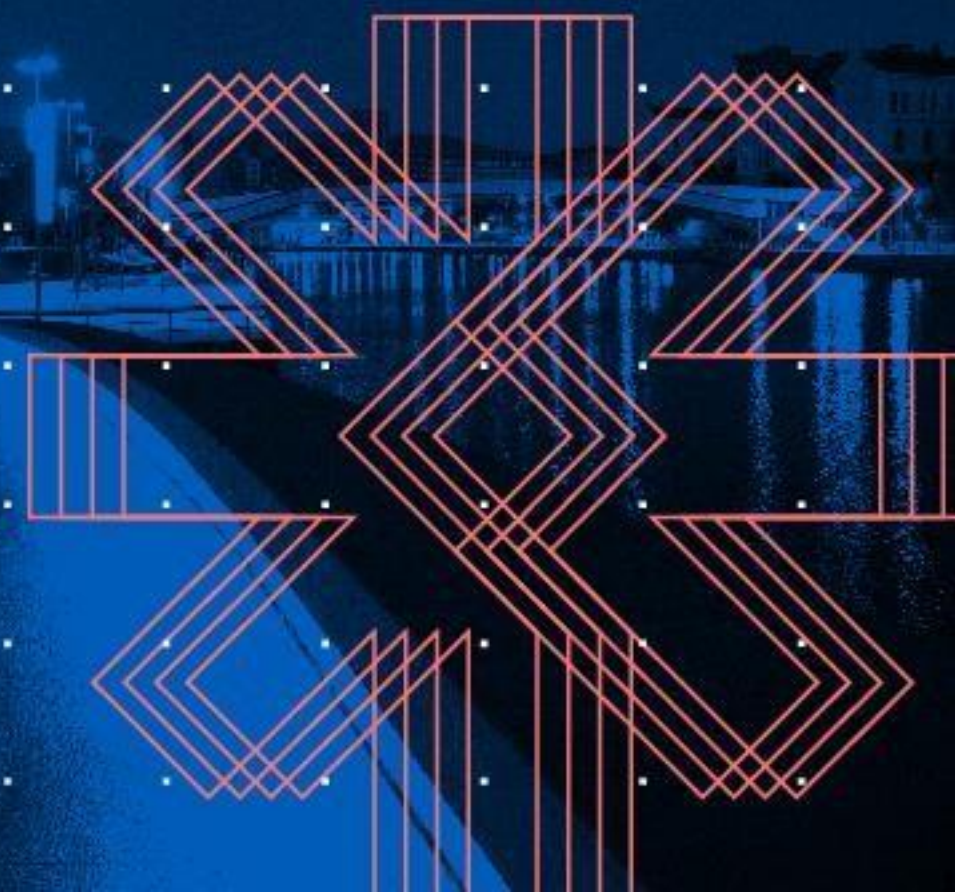
A country's commitment to decarbonization



**BasqueTrade
& Investment**
Agencia Vasca de Internacionalización
Nazioartekatzeko Euskal Agentzia



ELISKO JAURDARITZA
GOBIERNO VASCO
BASQUE GOVERNMENT

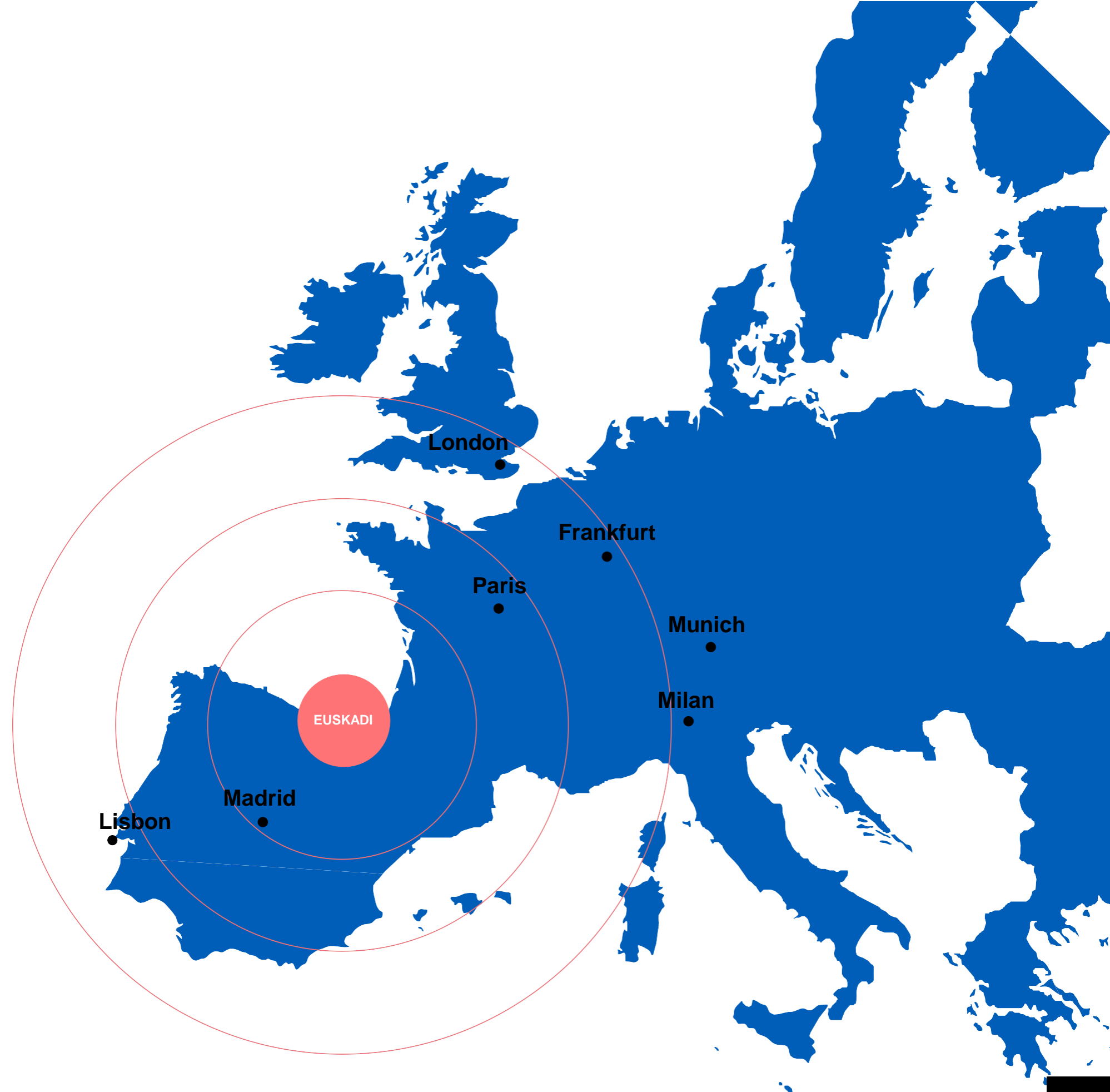


Euskadi Basque Country

In the race for competitiveness in a highly globalised economy, the Basque Country is in a privileged position to access the main European markets thanks to its **strategic location in the centre of the European Atlantic Axis.**

7,234 km²
surface area

2,191,613
population



And thanks to this sustained commitment, the Basque Country has positioned itself as an important industrial region

35.621 €

GDP per cápita
110 (UE27=100)

123,3

Productivity per
person employed
(UE27=100)

37,2%

Exports %GDP
Spain 30,0%
France 22,2%
Germany 40,7%

0,936

Human
Development
Index

The Basque Country in figures

24,6%

Industrial GDP
UE27: 20,6%

+4,4%

Annual increase GPD in
2022
Spain +5,5%
France +2,6%
Germany +1,8%

2,2%

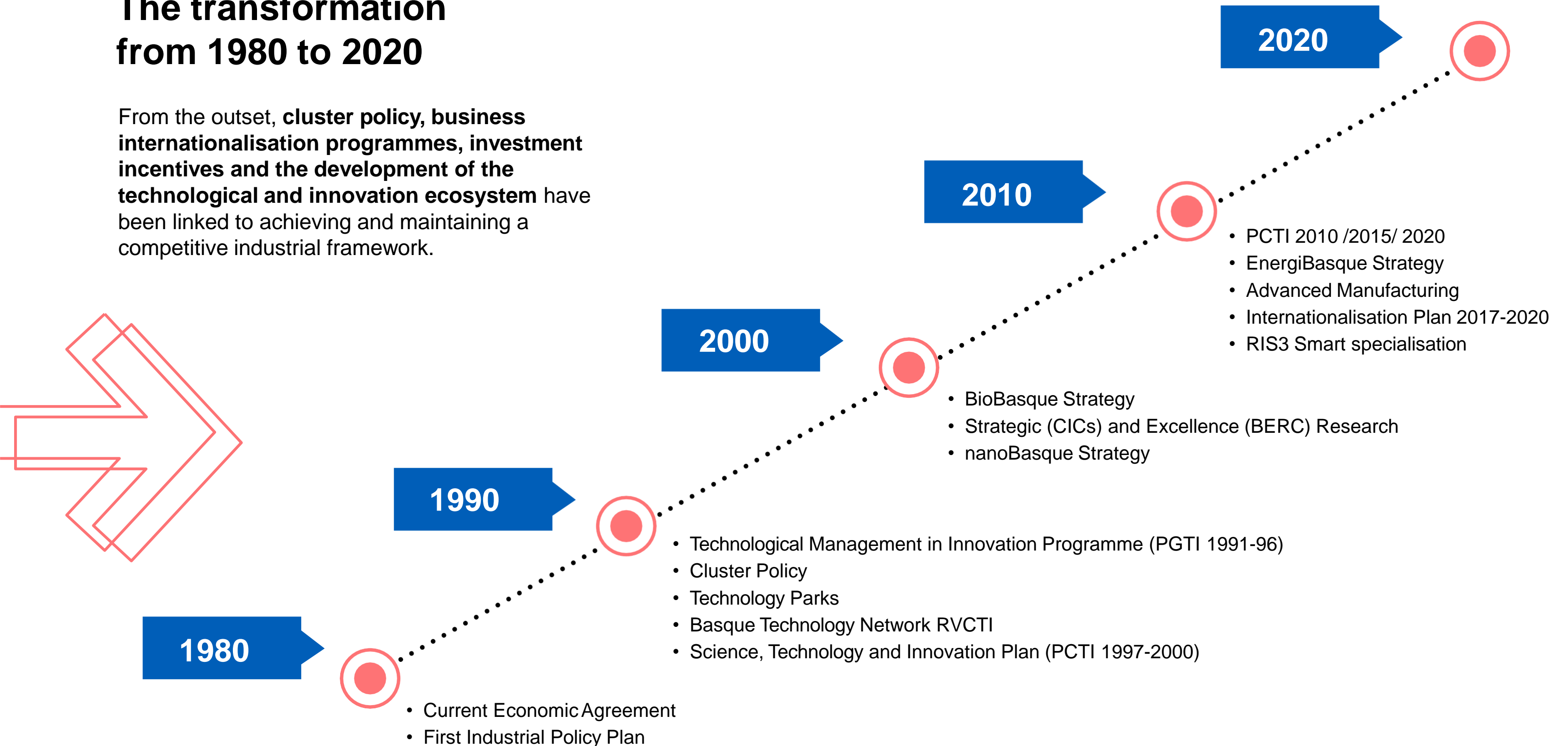
Expense in R+D (%
GDP)
Spain 1,43%

20.804

Employment R+D
total (people)

The transformation from 1980 to 2020

From the outset, **cluster policy, business internationalisation programmes, investment incentives and the development of the technological and innovation ecosystem** have been linked to achieving and maintaining a competitive industrial framework.



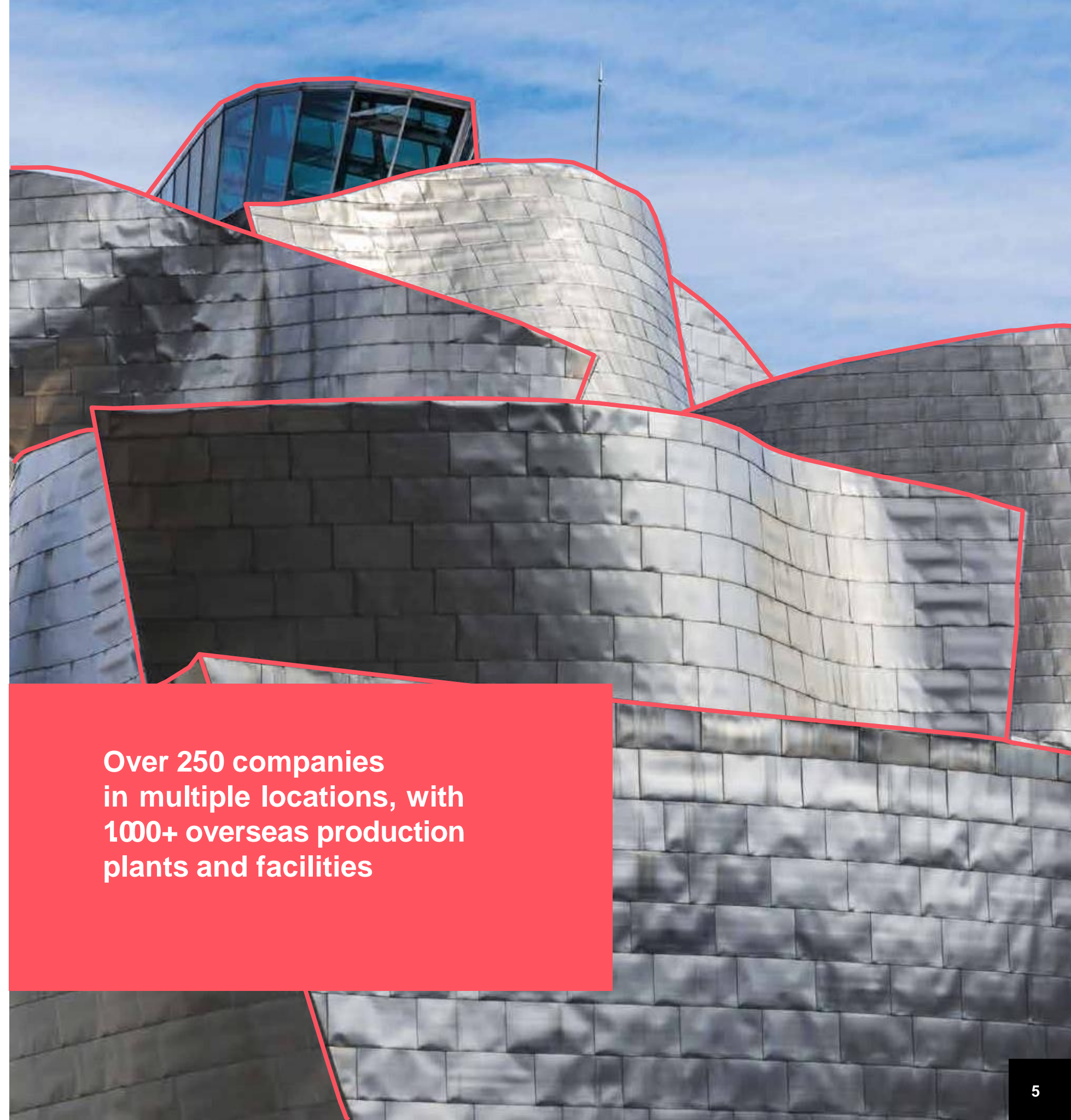
A clear international orientation

Basque Trade & Investment (Basque Agency for Internationalisation), was set up in response to the Basque Government's firm commitment to promote the international projects of Basque companies.

Companies with a **strong work ethic, committed, reliable and experienced partners**, with the capacity to take projects forward with the highest possible guarantee.

5,000 exporting companies

Over 250 companies in multiple locations, with 1000+ overseas production plants and facilities



Top10

The trade balance with these countries is positive.

Who are our main business partners?

In 2022, 64.0% of our exports went to EU countries.

NAFTA accounted for 9.3% and the BRIC countries for 4.2% of the total.

15.4%

Germany €5,000M

15.2%

France €4,958M

6.9%

United States €2,258M

6.2%

The Neetherlands €2,011 M

6.1%

United Kingdom €1,983 M

5.4%

Italy €1,753 M

5.4%

Belgium €1,747 M

4,5%

Portugal €1,468 M

2.3%

Poland €738 M

2.2%

China €712 M



Energy

96,305 jobs
€56,090 M

434 companies: Iberdrola, Siemens
Gamesa, Petronor, Ormazabal, Elecnor, etc.



Railway industry

11,413 jobs
€2,148 M

32 companies: CAF, Talgo
Bombardier...



Maritime industry

13,735 jobs
€2,840 M

231 companies: Sener Naval, Vicinay
Cadenas, Astilleros Balenciaga, Murueta, etc.



Automotive

120,000 jobs
€18,351 M

306 companies: Gestamp, CIE, Irizar,
Mercedes Benz, Bridgestone, etc.



Advanced Machinery

7,489 jobs
€1,731 M

128 companies: Danobat, Zayer,
Lazpiur, Lantek, IZAR Cutting Tools, etc.



Aeronautics

14,856 jobs
€2,457 M

65 companies: ITP, Aeronova,
Sener, Aciturri, Altran, etc.



ICT

19,276 jobs
€4,958 M

258 companies: Ibermatica, Euskaltel,
Ikusi Velatia, Entelgi, etc.



Ecoindustries

15,700 jobs
€3,715 M

436 companies: Indumental Recycling,
Idom, Acciona Agua, EKO-REC, etc.



Bio-health

7,300 jobs
€1,450 M

150 companies: FAES Pharma, PRAXIS,
Progenika-Griuols, Noray Biosciences, etc.

Main companies and players in Basque energy sector

Cluster Energia

Founded in 1996

+ 200 associates

Energy operators
Equipment manufacturers
Components
Engineering firms
Service companies

The energy sector in the Basque Country is led by 8 large operators...



...4 service companies with relevant capabilities and size...



...and a large group of manufacturers with a strong international position



...which are supported by a robust scientific-technological infrastructure

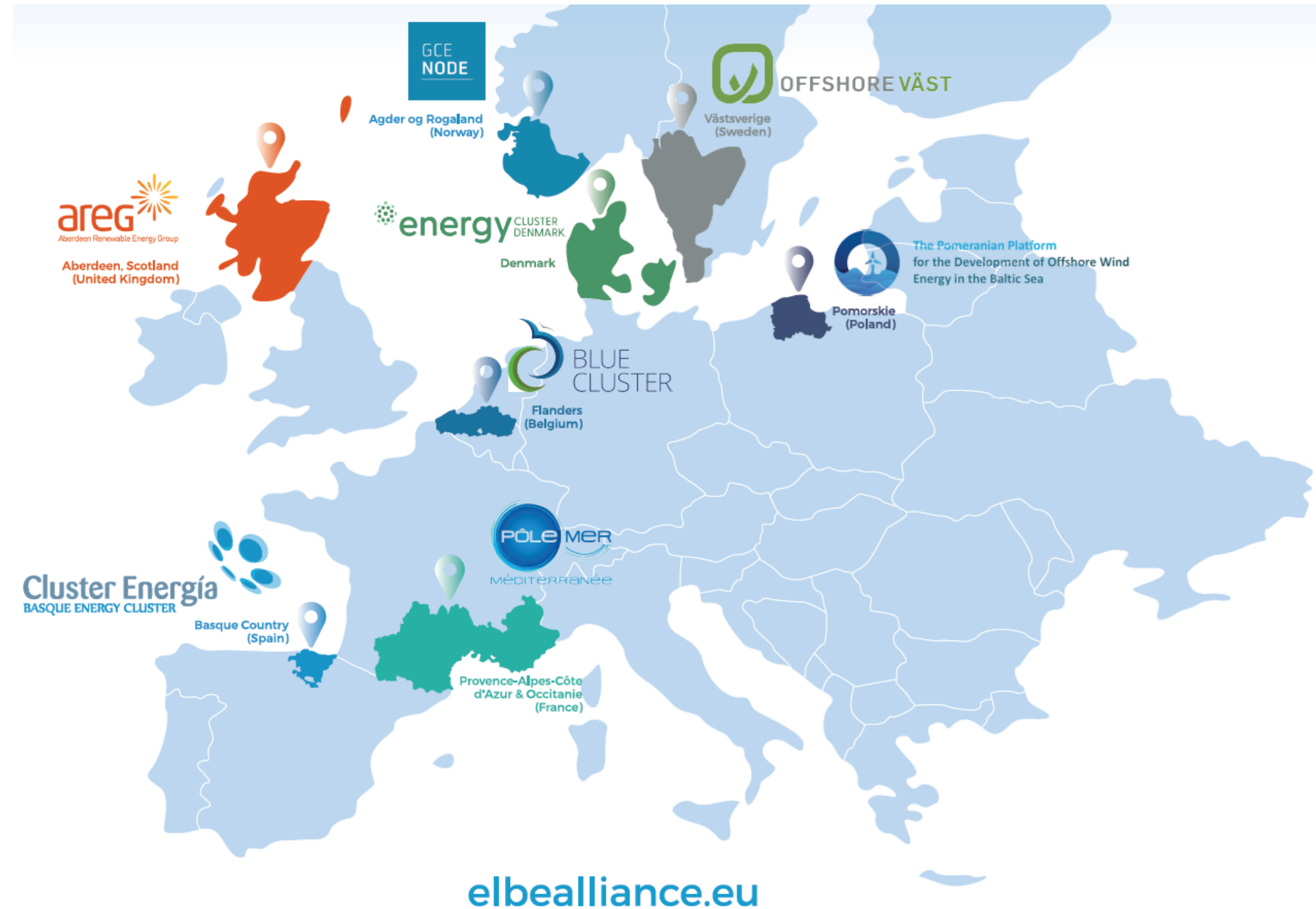


Wind Basque Supply Chain



Colaboration through:

- **INDUSTRY: ELBE Alliance**
 - 8 leading european regions in offshore Renewable Energy selected by the European Commission
- **INFRAESTRUCTURE**
 - Bilbao Port – Port of Amsterdam – Duisport
- **GOVERNMENT**
 - Ex: Flandes, Scotland, Rio Grande do Sul ...
- **UNIVERSITIES**



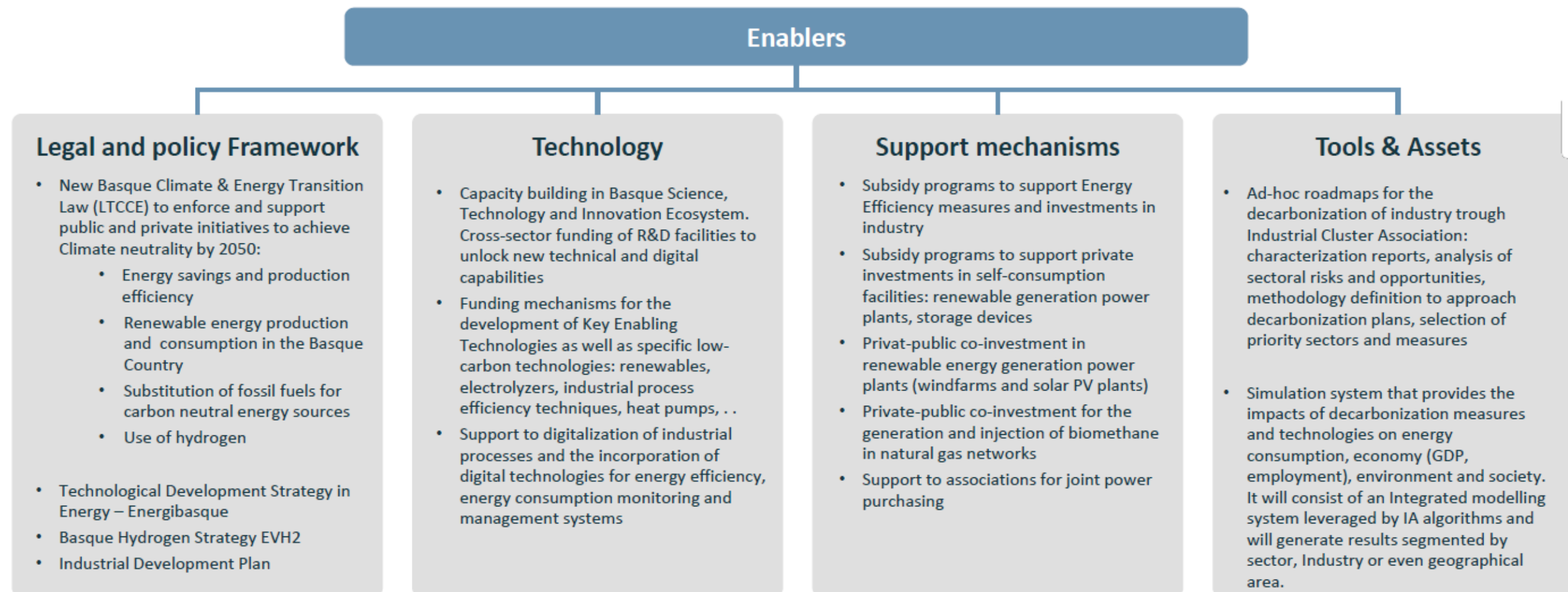
Low Carbon Industry

- Basque Net Zero Industrial Super Cluster: Net zero by 2050 (New Basque Climate & Energy Transition Law)
- 7,2 MT CO2 emisiones caused by industry (38,7%)



- Super Cluster because will integrate the Industrial Clusters (Industrial associations) already operating in the Basque Country
- Collaboration and commitment between the Government and the key Energy Companies operating in the geographic area, to develop and implement roadmaps.
- With an initial focus to target five Industries up to 67,1% of total GHG emissions in the area: Refinery, Cement, Steel, Foundry and Pulp & Paper.
- Align on common goals (e.g., scale net-zero technologies, create jobs, deploy digital services, etc.) and develop cluster-specific roadmaps to achieve net-zero targets by a target year.

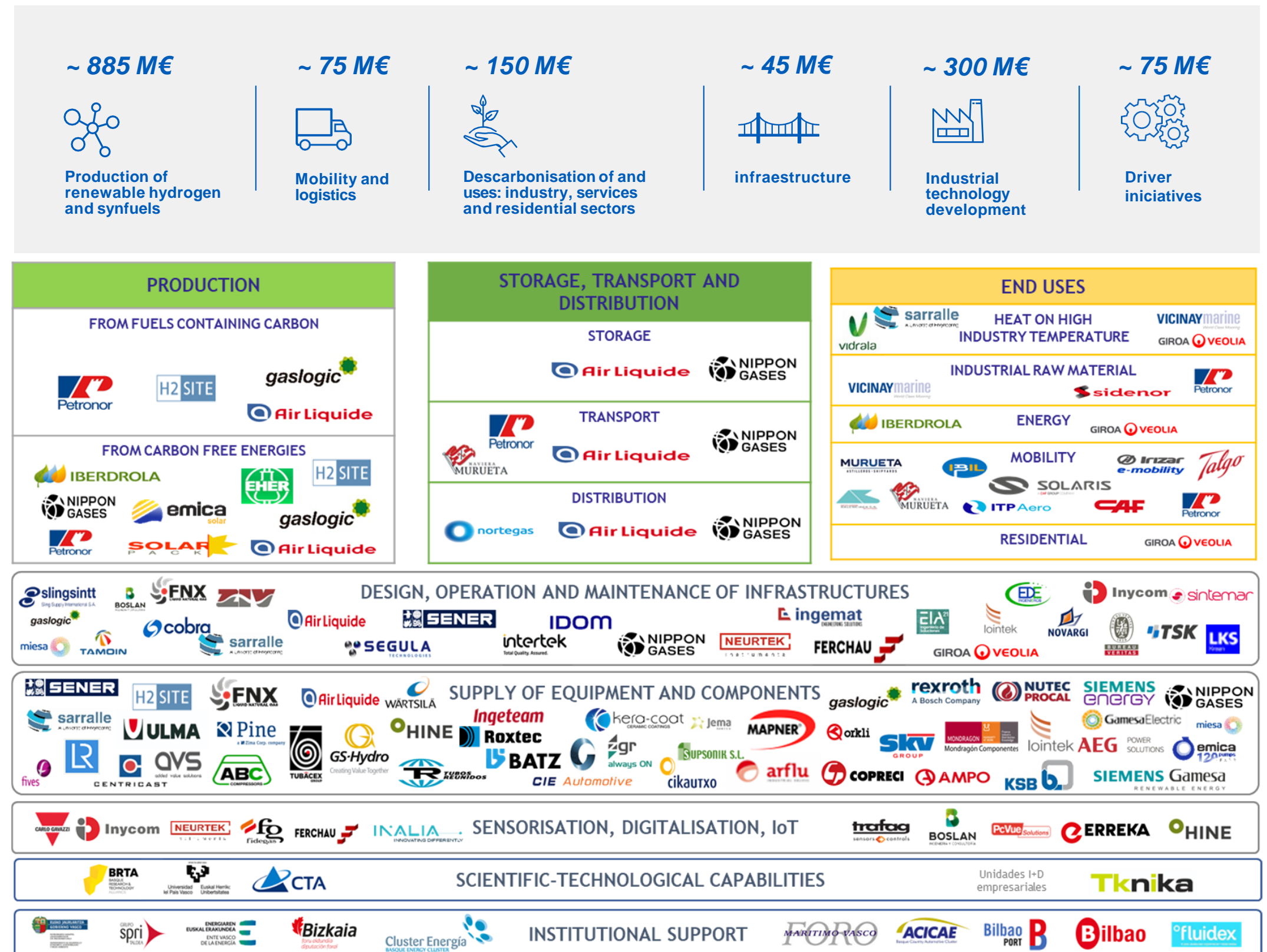
The Basque Government is committed to support the development of required enablers



Our value in Hydrogen

The Basque country holds important technological and industrial capacities to position itself and compete in the hydrogen value chain

Main Activity Areas and





**The Basque Country is the commitment of its
companies, its industrial tradition and the
ongoing search for excellence.**

If you're looking for innovation, expert know-how, a
strong work ethic and guaranteed commitment:

visit us, contact us

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.eus**

EUSKADI

BASQUE COUNTRY



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