BASQUE COUNTRY

Gallery of socioeconomic indicators 2026



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

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FOREWORD

This 2026 gallery of indicators from GAINDEGIA, as you will see in the following pages, brings notable new features in terms of content; but it also brings with it a loss.

This foreword would have been written by Iñaki Dorronsoro, as he did last year, had we not lost him along the way. But so it happened: this summer, in June, he left us. An aggressive cancer took him, after a year of striving to hold firmly on to the thread of life.

To him we extend our most sincere gratitude and our deepest recognition. As he did so many other times in his life, when GAINDEGIA faced a difficult moment, he gave us a resounding yes when we asked him to take on the presidency of the association. Our recognition and remembrance for an exemplary colleague.

I mentioned the new features earlier. There are two, mainly. I will only mention them briefly, as a preview of what is developed in the following pages.

The first, although it is not the gallery itself, is a new output of our statistical work: DatuAtaria. That is what we have called it —it is, in fact, a data portal— following the style of current project names. If researchers, teachers, students or anyone curious wish to find statistical data on the socioeconomic situation of the Basque Country[1] as a whole, they will have at their disposal a continuously updated data portal, available for consultation at any time.

The second is this gallery itself, the 2026 edition. It is the first output of the new conceptual framework established after an in-depth process of reflection. For its new stage, GAINDEGIA set up a high-level Scientific Committee, made up of seventeen experts and coordinated by Anjeles Iztueta. In addition, in March 2025 a seminar was held at the Public University of Navarre with more than forty experts of the same level to create the new conceptual framework. Since then, collaboration has been constant, and its first result is this gallery that you now hold in your hands.

We now leave the judgement in your hands, those of our users.

On behalf of the GAINDEGIA Board of Directors,
Xabier Oleaga-Arondo

[1] In the English version of this report, "Basque Country" and "Euskal Herria" are used as synonyms: both refer to all seven territories, namely Araba, Bizkaia, Gipuzkoa and Navarre (Hego Euskal Herria), and Lapurdi, Lower Navarre and Zuberoa (Iparralde).

OVERVIEW OF THE BASQUE COUNTRY





DEMOGRAPHY

Deaths outnumber births: the Basque Country grows thanks to migration

The Basque Country had 3,200,870 inhabitants in 2023, 10.3% more than in 1999. Since 2014, deaths have outnumbered births, and all growth is due to net migration. The population is ageing and is increasingly diverse in origin: one in four people is over 65, and one in three was born outside Euskal Herria.

3,200,870
inhabitants in the Basque Country (2023)

-3.5‰
natural change, per 1,000 inhabitants (2023)

24.2%
aged over 65 (2023)

32.3%
born outside Euskal Herria (2022)

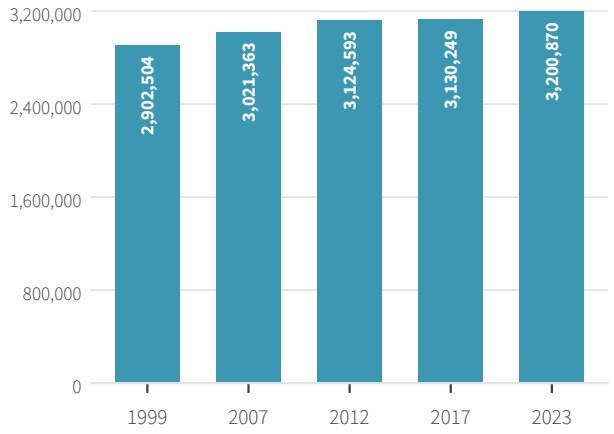
1.1
POPULATION AND TERRITORY

3.2 million inhabitants, 10.3% more than at the start of the century, and increasingly concentrated

In 2023, the Basque Country had 3,200,870 inhabitants, 298,366 more than in 1999 (10.3%)[2]. Growth has not been the same in all territories: it has been highest in Lapurdi (29.3%) and Navarre (24.9%); Bizkaia has barely changed (0.6%), and Zuberoa has lost inhabitants (-7%).

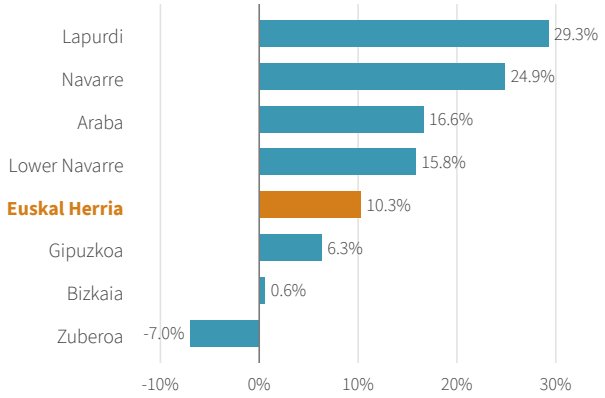
Bizkaia is the most populous territory: it is home to 35.8% of the Basque population, followed by Gipuzkoa (22.5%) and Navarre (21%). Iparralde has 329,856 inhabitants, 10.3% of the total. Annual data for Hego Euskal Herria[3] show that growth has continued: in 2025 it had 2,904,223 inhabitants, 33,209 more than in 2023.

Population. Basque Country, 1999-2023 (number of inhabitants)



Source: EUSTAT, INE (Municipal Register), INSEE. Compiled by Gaindegia.

Population change, by territory. Basque Country, 1999-2023 (%)



Source: EUSTAT, INE (Municipal Register), INSEE. Compiled by Gaindegia.

Population, demographic weight and density, by territory. Basque Country, 2023

Territory	Inhabitants	Share (%)	Change 1999-2023 (%)	Population density (inhab./km²)
Araba	334,748	10.5	16.6%	100.6
Bizkaia	1,144,471	35.8	0.6%	511.8
Gipuzkoa	720,049	22.5	6.3%	364.0
Navarre	671,746	21.0	24.9%	64.6
Lapurdi	282,954	8.8	29.3%	324.3
Lower Navarre	32,855	1.0	15.8%	24.7
Zuberoa	14,047	0.4	-7.0%	17.7
Euskal Herria	**3,200,870**	**100.0**	**10.3%**	**152.9**

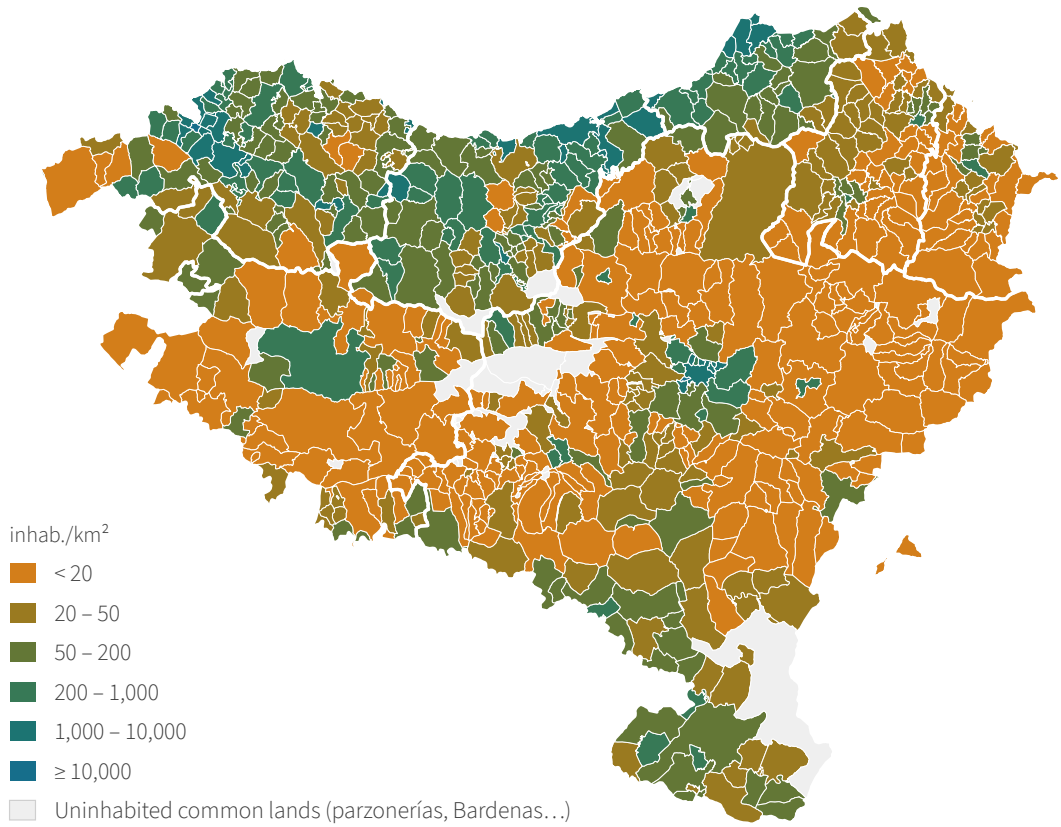
Source: EUSTAT, INE (Municipal Register), INSEE. Compiled by Gaindegia.

[2] In addition to the data shown in the charts, all the data cited in the texts of the report are available on Gaindegia's DatuAtaria.

[3] Hego Euskal Herria: Araba, Bizkaia, Gipuzkoa and Navarre (excluding Iparralde). In charts, maps and tables it is shown as "Euskal Herria*".

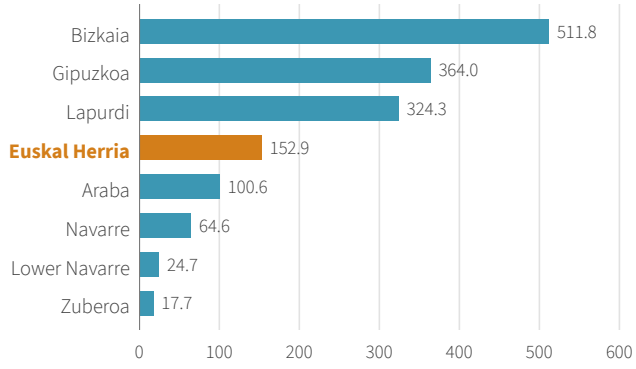
The average population density of Euskal Herria is 152.9 inhab./km², but its distribution is very uneven. Bizkaia (511.8), Gipuzkoa (364) and Lapurdi (324.3) have high densities, whereas Lower Navarre (24.7) and Zuberoa (17.7) are sparsely populated. The 38 municipalities with more than 1,000 inhab./km² are home to 52.3% of the population, although they cover only 2.5% of the territory; conversely, the 244 municipalities with fewer than 20 inhab./km² cover 46.3% of the territory but account for only 2.7% of the population.

Population density, by municipality. Basque Country, 2023 (inhab./km²)



Source: EUSTAT, INE (Municipal Register), INSEE. Compiled by Gaindegia.

Population density, by territory. Basque Country, 2023 (inhab./km²)



Source: EUSTAT, INE (Municipal Register), INSEE. Compiled by Gaindegia.

52.3% of the population lives on 2.5% of the territory.

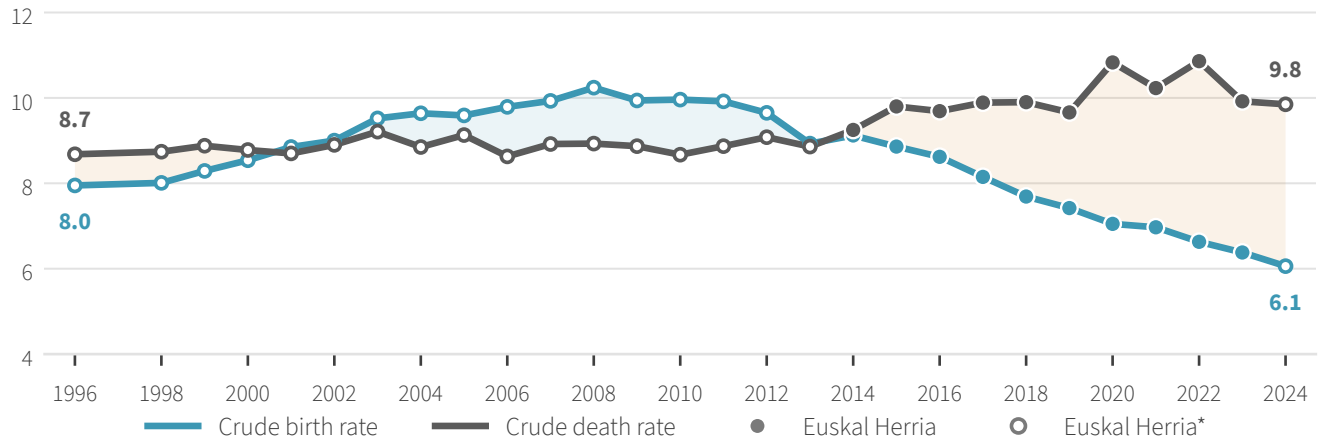
1.2 BIRTHS, DEATHS AND NATURAL CHANGE

Since 2014, more people have died than have been born each year

The crude birth rate peaked in 2008 (10.2‰) and has fallen almost continuously since then, to 6.1‰ in 2024. The crude death rate, by contrast, has risen as the population ages (9.8‰). As a result, natural change[4] has been negative since 2014, and stood at -3.8‰ in 2024.

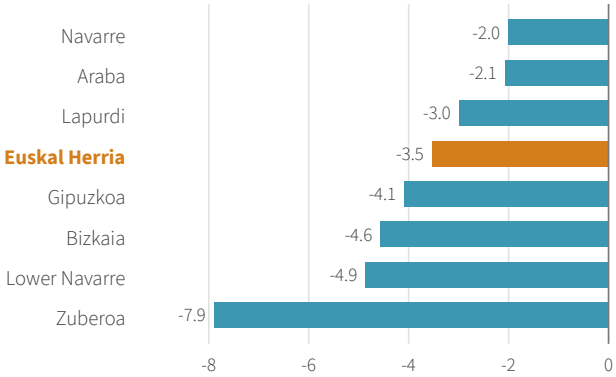
In 2023, the Basque Country as a whole recorded 20,428 births and 31,764 deaths: a natural change of -11,336 people (-3.5‰). It is negative in all territories. It is most pronounced in Zuberoa (-7.9‰) and Lower Navarre (-4.9‰), which have the highest death rates, and mildest in Navarre (-2‰) and Araba (-2.1‰). Lapurdi has the highest birth rate (7.6‰), and Zuberoa the lowest (5.5‰).

Crude birth rate and crude death rate. Basque Country, 1996-2024 (per 1,000 inhabitants)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: EUSTAT, INE, INSEE. Compiled by Gaindegia.

Natural change, by territory. Basque Country, 2023 (per 1,000 inhabitants)



Source: EUSTAT, INE, INSEE. Compiled by Gaindegia.

Crude birth rate and crude death rate, by territory. Basque Country, 2023 (per 1,000 inhabitants)

Territory	Crude birth rate	Crude death rate	Natural change
Araba	6.7	8.7	-2.1
Bizkaia	5.8	10.4	-4.6
Gipuzkoa	6.3	10.4	-4.1
Navarre	6.7	8.7	-2.0
Lapurdi	7.6	10.6	-3.0
Lower Navarre	7.5	12.4	-4.9
Zuberoa	5.5	13.4	-7.9
Euskal Herria	**6.4**	**9.9**	**-3.5**

Source: EUSTAT, INE, INSEE. Compiled by Gaindegia.

[4] Natural change: births minus deaths.

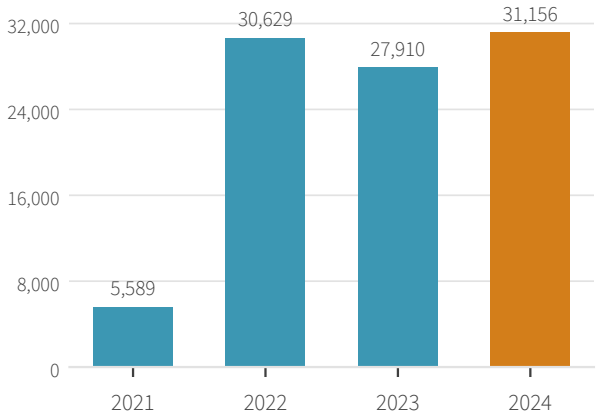
1.3
MIGRATION AND PLACE OF BIRTH

Migration sustains growth: a net balance of 31,156 people in 2024

In Hego Euskal Herria, the difference between arrivals and departures is positive every year. In 2024 it amounted to 31,156 people (10.7‰). In 2021, owing to the pandemic, it was only 5,589; between 2022 and 2024, by contrast, 89,695 more people arrived than left.

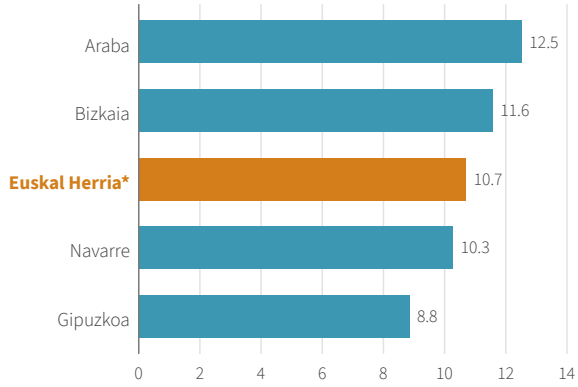
This balance offsets the negative natural change: in 2024, natural change in Hego Euskal Herria was -10,934 people, but thanks to migration the population grew by 20,222 people. Araba has the highest net migration rate (12.5 ‰) and Gipuzkoa the lowest (8.8‰). No annual migration data are available for Iparralde.

Net migration. Euskal Herria*, 2021-2024 (number of people)



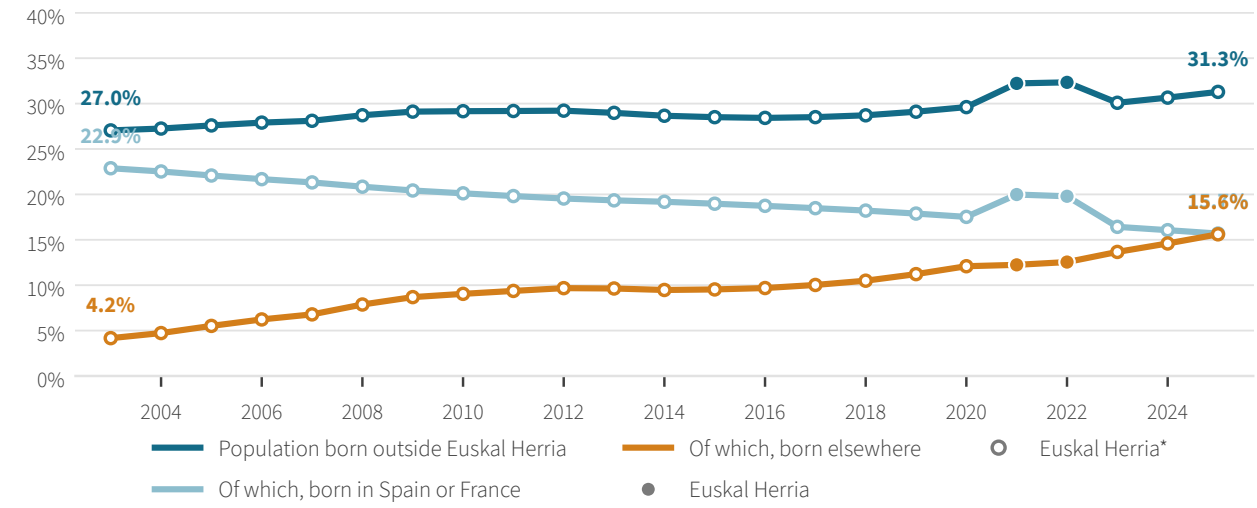
Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: INE (Migration Statistics). Compiled by Gaindegia.

Net migration, by territory. Euskal Herria*, 2024 (per 1,000 inhabitants)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: INE (Migration Statistics). Compiled by Gaindegia.

Population born outside the Basque Country. Basque Country, 2003-2025 (%)

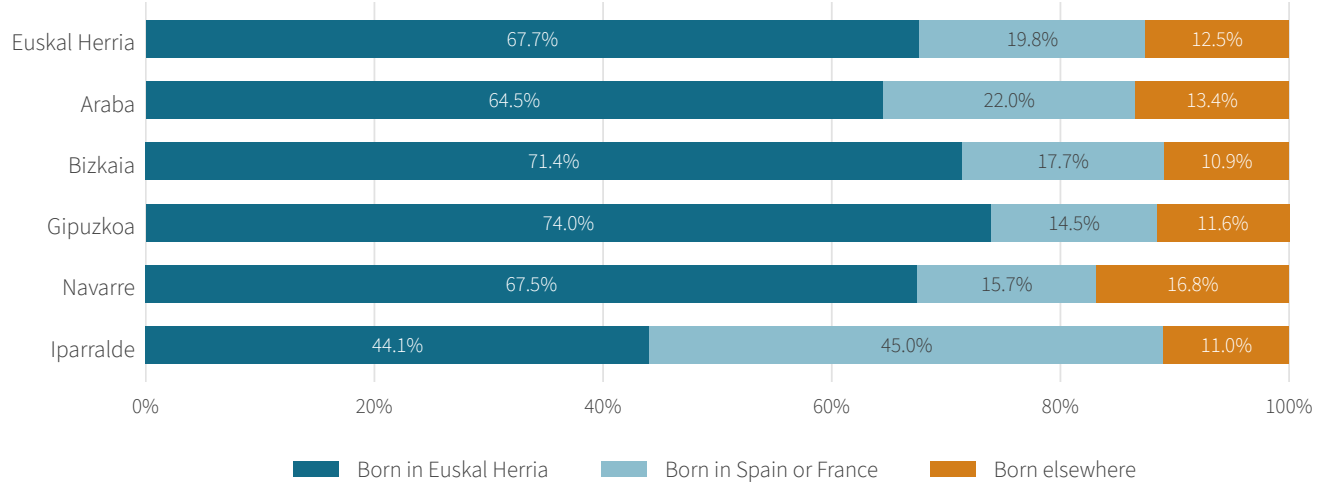


Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: INE, INSEE. Compiled by Gaindegia.

Migration flows have changed the origin of the population. 32.3% of the population of the Basque Country was born outside Euskal Herria (2022). In Hego Euskal Herria this proportion was 27% in 2003 and is 31.3% in 2025, but the origin has changed completely: people born in Spain have fallen from 22.9% to 15.7%, and people born elsewhere have risen from 4.2% to 15.6%.

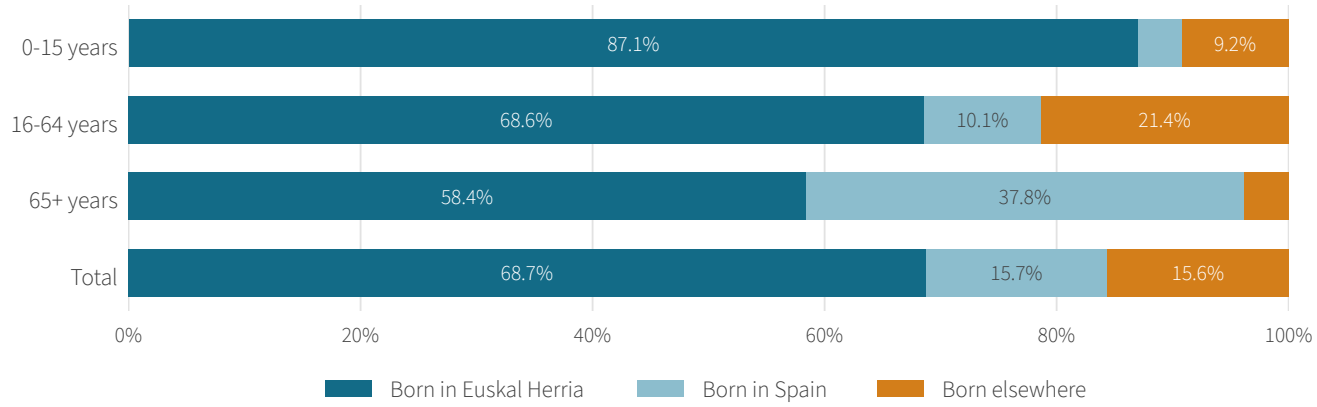
In Iparralde, 55.9% of the population was born outside the Basque Country, mostly in other départements of France. In Hegoalde, Araba (35.5%) and Navarre (32.5%) have the highest proportions, and Gipuzkoa (26%) the lowest. By age, 21.4% of people aged 16-64 were born elsewhere, and 37.8% of those aged over 65 were born in Spain.

Population by place of birth, by territory. Basque Country, 2022 (%)



Source: INE, INSEE. Compiled by Gaindegia.

Population by place of birth, by age group. Euskal Herria*, 2025 (%)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. In Hegoalde, people born in Navarre who live in the Basque Autonomous Community (BAC)[5] (and vice versa) are counted as "Born in Spain"; the proportion of people born outside the Basque Country is therefore slightly overestimated. In Iparralde, "Born in Spain or France" = people born in other French départements.
Source: INE. Compiled by Gaindegia.

One in three people in the Basque Country was born outside Euskal Herria (32.3%).

[5] BAC: Basque Autonomous Community, made up of Araba, Bizkaia and Gipuzkoa.



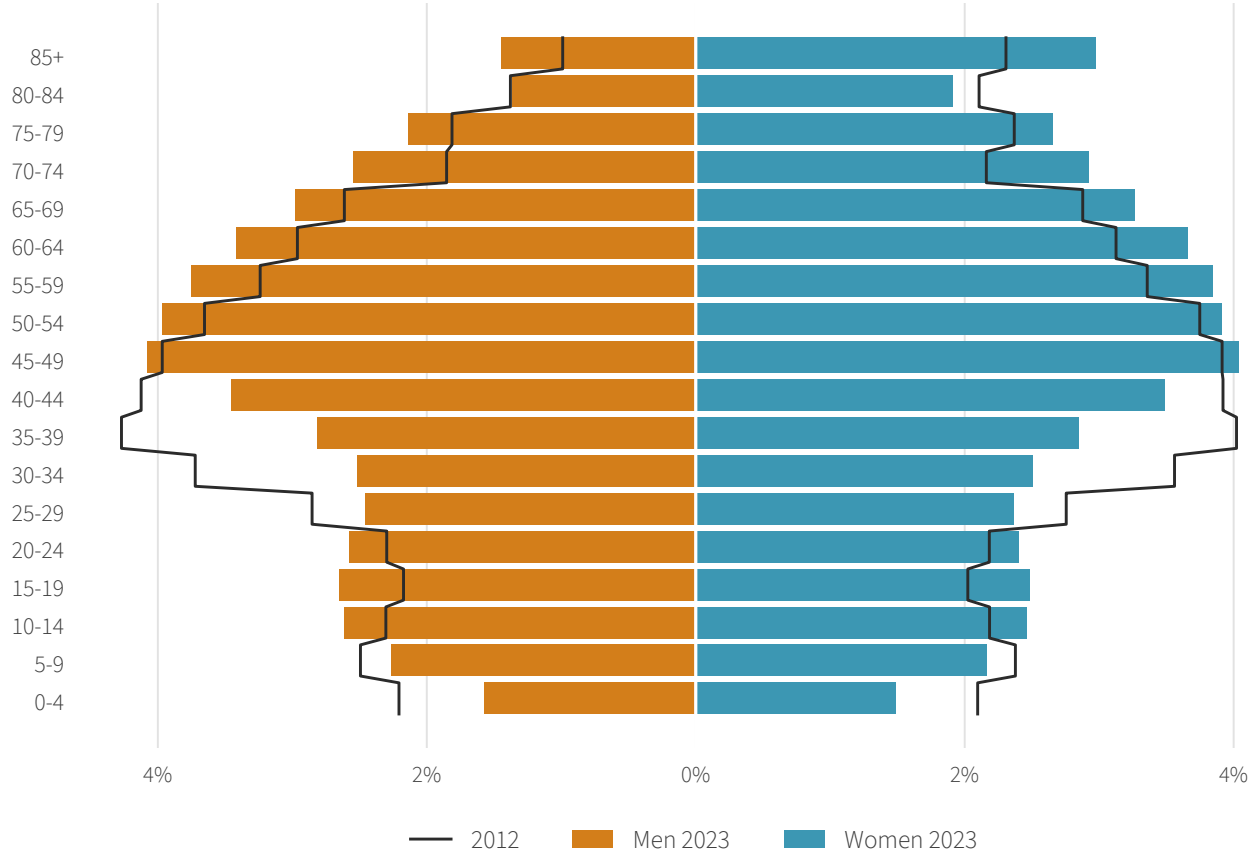
1.4
AGE STRUCTURE AND AGEING

One in four people is over 65, and the pyramid is narrowing at the base

The age pyramid clearly shows the ageing process. Between 2012 and 2023, the share of people aged 0-14 fell from 13.7% to 12.6%, and the share of those aged over 65 rose from 20.5% to 24.2%. The mean age went from 43.7 to 46 years.

The base of the pyramid has narrowed: today the largest group is aged 45-49, and the 0-4 age group is only 38% of it. At the top, there are 134,596 more people aged over 65 than in 2012, and the number of those aged over 85 has increased by 37.1%; at that age, there are 2.1 women for every man.

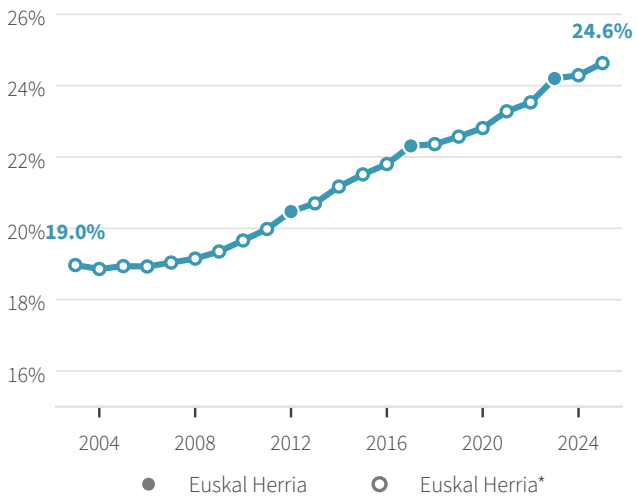
Age pyramid, by sex. Basque Country, 2012 and 2023 (% of total population)



Note: Iparralde data estimated in 5-year age groups from INSEE's 7 age bands.
Source: EUSTAT, INE, INSEE. Compiled by Gaindegia.

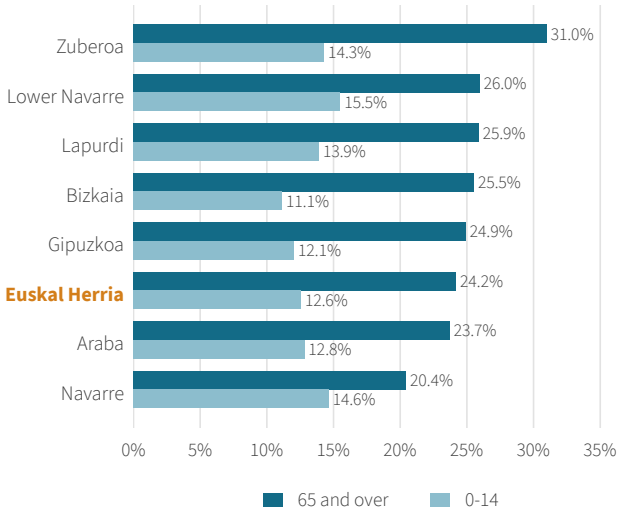
The ageing rate[6] was 24.2% in 2023 (774,075 people), 3.7 points higher than in 2012, and stands at 24.6% in Hego Euskal Herria in 2025. Zuberoa is the oldest territory (31%) and Navarre the youngest (20.4%). The ageing rate of women (26.7%) is markedly higher than that of men (21.5%).

Ageing rate. Basque Country, 2003-2025 (% aged over 65)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: EUSTAT, INE, INSEE. Compiled by Gaindegia.

Population under 15 and over 65, by territory. Basque Country, 2023 (%)



Source: EUSTAT, INE, INSEE. Compiled by Gaindegia.

Main age structure indicators. Basque Country, 2012 and 2023

Indicator	2012	2023
Aged 0-14 (%)	13.7	12.6
Aged 15-64 (%)	65.9	63.2
Aged 65 and over (%)	20.5	24.2
Aged 80 and over (%)	6.8	7.7
Mean age (years)	43.7	46.0
Ageing index (65+ / 0-14 × 100)	150	193

Source: EUSTAT, INE, INSEE. Compiled by Gaindegia.

There are 193 people aged over 65 for every 100 under 15 (150 in 2012).

[6] Ageing rate: proportion of people aged over 65 in the total population.

SUMMARY

Growth thanks to migration. The Basque Country has 3,200,870 inhabitants (2023), 10.3% more than in 1999. This growth does not stem from natural dynamics: since 2014, deaths have outnumbered births, and net migration offsets that deficit.

Territorial imbalances. Lapurdi and Navarre have grown the most; Bizkaia has practically stagnated and Zuberoa is losing population. 52.3% of the population lives on 2.5% of the territory, and almost half of the territory consists of very sparsely populated municipalities.

Fewer births, more deaths. The crude birth rate was 10.2‰ in 2008 and is 6.1‰ in 2024; natural change is negative in all territories.

Ageing. People aged over 65 make up 24.2% of the population, and there are 193 older people for every 100 under 15. Zuberoa is the oldest territory (31%).

Diversity of origin. 32.3% of the population of Euskal Herria was born outside the Basque Country. While the generation that arrived from Spain in the 20th century is ageing, people born elsewhere now make up the majority of immigration: 21.4% of the population aged 16-64 in Hego Euskal Herria.

Main demographic indicators. Basque Country

Indicator	Euskal Herria	Trend (period)
Population (number)	3,200,870 (2023)	▲ Rising (1999-2023)
Population density (inhab./km²)	152.9 (2023)	▲ Rising (1999-2023)
Ageing rate (% aged over 65)	24.2% (2023)	▲ Rising (2003-2023) Euskal Herria*: 2003-2011, 2013-2016, 2018-2022
Population born outside Euskal Herria (%)	32.3% (2022)	▲ Rising, from elsewhere (2003-2022) Euskal Herria*: 2003-2020
Crude birth rate (per 1,000 inhabitants)	6.4 (2023)	▼ Falling since 2008 (1996-2023) Euskal Herria*: 1996, 1998-2013
Crude death rate (per 1,000 inhabitants)	9.9 (2023)	▲ Rising (1996-2023); falling since 2022 Euskal Herria*: 1996, 1998-2013
Natural change (per 1,000 inhabitants)	-3.5 (2023)	▼ Negative since 2014 (1996-2023) Euskal Herria*: 1996, 1998-2013

Note: Trends: for years without data for Euskal Herria as a whole, Euskal Herria* (excluding Iparralde) has been used; those years are indicated in each row.
Source: EUSTAT, INE, INSEE. Compiled by Gaindegia.



ECONOMY

Industry and exports sustain prosperity, but productivity is stagnating

GDP per capita in the Basque Country is 42,332 PPS (purchasing power standards) (2023). Industry generates 24.1% of value added, exports of goods amount to 36% of GDP and 1.9% of GDP is invested in R&D. However, in Hego Euskal Herria real labour productivity per hour has barely grown since 2015 (3.7%), while unit labour cost has risen by 23.4%. In terms of GDP per capita, Araba and Gipuzkoa are the most prosperous territories.

42,332
PPS, GDP per capita (2023)

24.1%
share of industry in value added (2023)

36%
exports of goods, % of GDP (2023)

1.9%
R&D expenditure, % of GDP (2023)

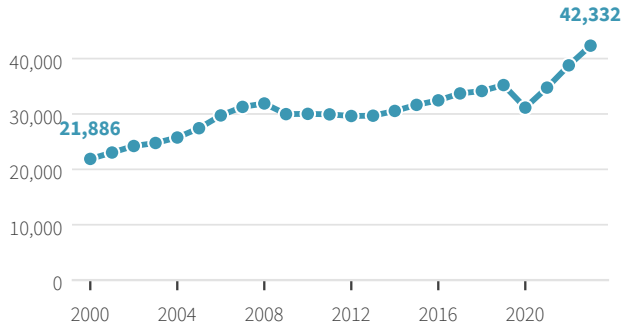
2.1 WEALTH AND PRODUCTIVE STRUCTURE

GDP per capita stands at 42,332 PPS, and industry generates a quarter of value added

Gross domestic product per capita in Euskal Herria was 42,332 PPS[7] in 2023. After the fall in 2020 it has grown considerably: it is 20.2% higher than in 2019, in nominal terms. Araba is the most prosperous territory (46,860 PPS), followed by Gipuzkoa (43,816), Bizkaia (42,933) and Navarre (41,517); Iparralde (33,937) is clearly below the rest.

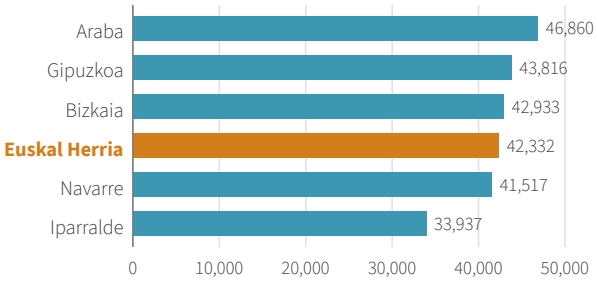
Industry[8] is one of the mainstays of the economy: it generates 24.1% of gross value added (2023), and manufacturing alone 20.9%. Its weight is greater in Navarre (29.9%), Araba (29.5%) and Gipuzkoa (27.7%); in Bizkaia (19.1%) and, above all, in Iparralde (13.8%) services predominate. The share of industry fell sharply with the 2008 crisis: in Araba from 34.8% to 30.8%, in Gipuzkoa from 32.3% to 29% and in Bizkaia from 23.8% to 21% (2008-2010); in Navarre, from 30.6% to 28.7% in a single year. It has not returned to its 2008 level since.

GDP per capita. Basque Country, 2000-2023 (PPS)



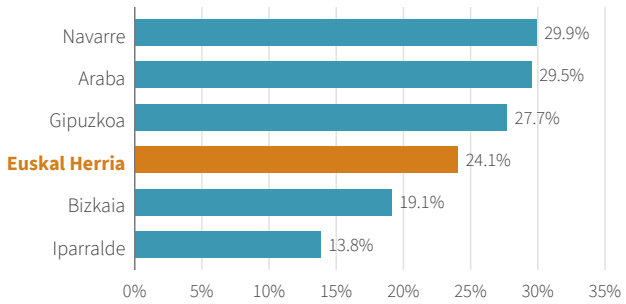
Source: Eurostat (regional accounts). Compiled by Gaindegia.

GDP per capita, by territory. Basque Country, 2023 (PPS)



Note: The Iparralde figure is a Gaindegia estimate, based on employment by industry in Iparralde (see the methodological notes).
Source: Eurostat (regional accounts). Compiled by Gaindegia.

Share of industry in gross value added, by territory. Basque Country, 2023 (%)



Note: The Iparralde figure is an estimate: départemental value added by sector, scaled according to employment in Iparralde (INSEE FLORES) and weighted by productivity.
Source: EUSTAT, INSEE, Eurostat. Compiled by Gaindegia.

Industry generates 24.1% of the value added of the Basque Country.

[7] PPS (purchasing power standard): an artificial common currency unit that eliminates differences in price levels between countries, expressed in euros.

[8] Industry: NACE sections B-E (mining and quarrying, manufacturing, energy, and water supply and sewerage).

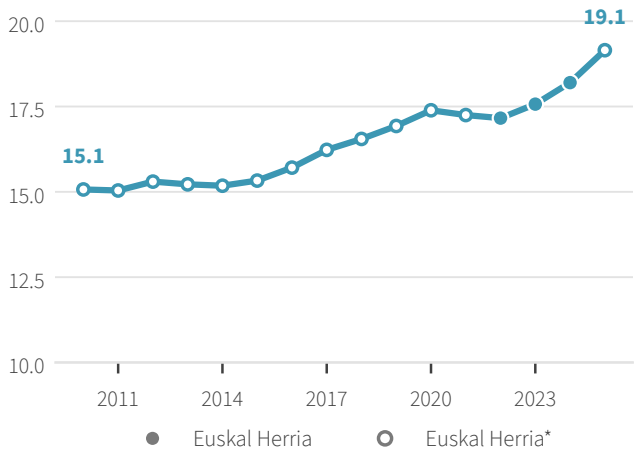
2.2 ENTERPRISES AND THE SOCIAL ECONOMY

Industrial establishments are fewer but larger, and cooperatives employ 4.7% of employed persons

Industrial establishments are fewer but larger. On average[9] they have 18.2 persons employed (2024); in Hego Euskal Herria the figure was 15.1 in 2010 and is 19.1 in 2025, while the number of establishments has fallen by 26.9%. The largest are found in Zuberoa (22.3) and Navarre (22), and the smallest in Lower Navarre (13.2).

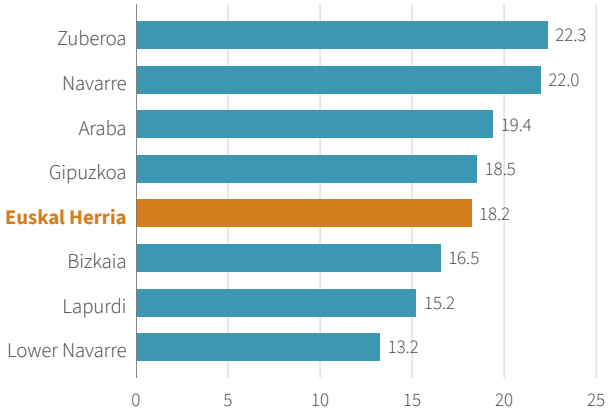
The business demography balance[10] is positive, but increasingly weak: in 2023, enterprise births exceeded enterprise closures by 963, 0.4% of active enterprises (1.9% in 2021). In Navarre, the balance is negative (-1%). In the territories of the BAC, according to EUSTAT's DIRAE, the balance is negative in 2025. These data are not directly comparable with the number of industrial establishments: business demography covers enterprises in all sectors (Eurostat), whereas the establishment data cover only industrial ones.

Average size of industrial establishments. Basque Country, 2010-2025 (persons employed per establishment)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: EUSTAT, NASTAT, INSEE. Compiled by Gaindegia.

Average size of industrial establishments, by territory. Basque Country, 2024 (persons employed per establishment)



Note: In Iparralde, estimated using INSEE data on establishments by municipality.
Source: EUSTAT, NASTAT, INSEE. Compiled by Gaindegia.

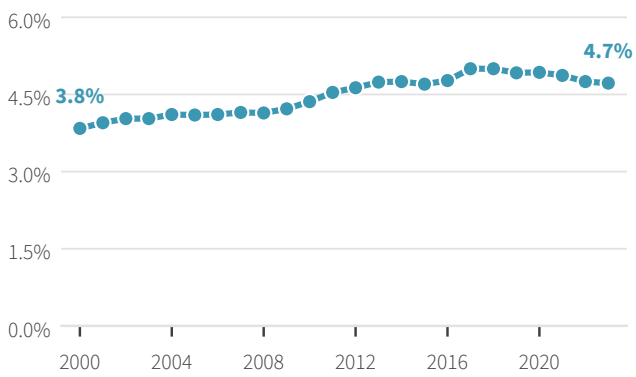
An industrial establishment in Euskal Herria has 18.2 persons employed on average (2024).

[9] Average size of industrial establishments: persons employed (in the BAC) or employees (in Navarre and Iparralde) per establishment, estimated using the midpoints of the size classes.

[10] Business demography balance: enterprise births in the year minus enterprise closures, as a share of active enterprises (total economy).

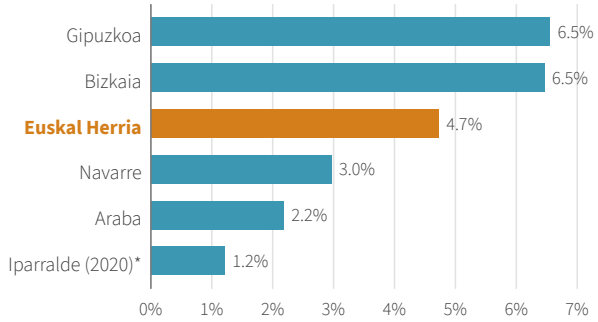
The social economy carries considerable weight: cooperatives[11] provide 72,320 jobs, 4.7% of employed persons (2023), more than in 2000 (3.8%). Gipuzkoa (6.5%) and Bizkaia (6.5%) concentrate cooperative employment; in Navarre, 3%, and in Araba, 2.2%.

Employment in cooperatives. Basque Country, 2000-2023 (% of employed persons)



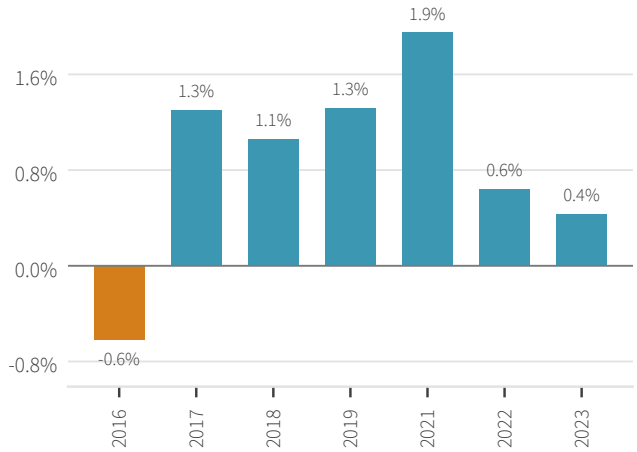
Source: CIRIEC, Urssaf, Eurostat. Compiled by Gaindegia.

Employment in cooperatives, by territory. Basque Country, 2023 (% of employed persons)



Note: * Iparralde, 2020: calculation by Kabia (CRESS Nouvelle-Aquitaine, INSEE Flores; 1,621 employees, including agriculture); data are available only for that year, and are not fully comparable with the rest. The Basque Country series includes a partial estimate for Iparralde: départemental cooperative employment, scaled according to Iparralde's share of employment, and only the part measured by Urssaf (general scheme, excluding MSA). In 2020, employment was reclassified between provinces (mainly from Gipuzkoa to Bizkaia).
Source: CIRIEC, Urssaf, Eurostat. Compiled by Gaindegia.

Net business demography balance (births minus closures). Basque Country, 2016-2023 (% of active enterprises)



Note: Eurostat business demography (all sectors); no data for 2020. Closures in the most recent years are provisional. The Euskal Herria data include an estimate for Iparralde, scaled from the départemental figure.
Source: Eurostat (business demography). Compiled by Gaindegia.

Cooperatives provide 72,320 jobs in the Basque Country, 4.7% of employed persons.

[11] Employment in cooperatives: persons employed in cooperatives, as a share of total employment.

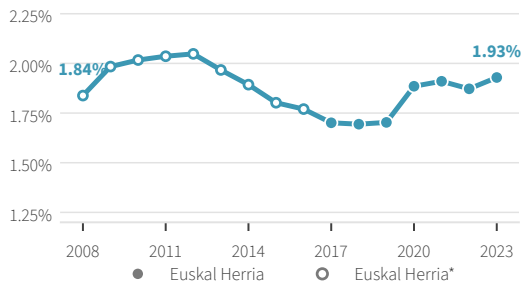
2.3 INNOVATION: RESEARCH AND DEVELOPMENT

1.9% of GDP goes to R&D: Gipuzkoa in the lead, Iparralde at the bottom

In 2023, 2,513 million euros were invested in research and development (R&D)[12] in Euskal Herria, 1.9% of GDP. The percentage has remained fairly stable over the last decade (in 2008 it was 1.8% in Hego Euskal Herria). Gipuzkoa (2.7%) stands well above the rest, followed by Bizkaia (1.9%), Navarre (1.8%) and Araba (1.6%). In Iparralde, it is 0.5% (estimate).

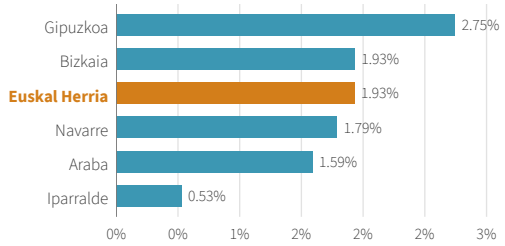
R&D personnel[13] account for 2.1% of total employment (29,842 in full-time equivalents). This proportion was 1.2% in 2001 in Hego Euskal Herria, and has grown considerably since then. In Gipuzkoa, 3.1% of jobs are in R&D; in Bizkaia, 2.1%; in Navarre, 2%; and in Araba, 1.8%.

R&D expenditure. Basque Country, 2008-2023 (% of GDP)



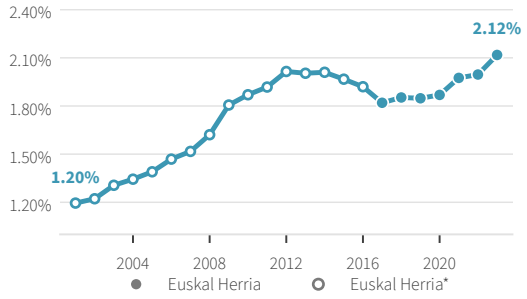
Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: EUSTAT, Eurostat. Compiled by Gaindegia.

R&D expenditure, by territory. Basque Country, 2023 (% of GDP)



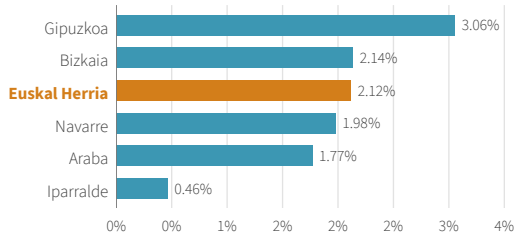
Note: The Iparralde figure is an estimate: a regression model fitted on French regions between R&D expenditure and employment in research activities (NACE 72), applied to NACE 72 employment in Iparralde.
Source: EUSTAT, Eurostat. Compiled by Gaindegia.

R&D personnel. Basque Country, 2001-2023 (% of total employment)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. BAC: EUSTAT; Navarre: Eurostat. The Iparralde figure is an estimate: a regression model fitted on French regions between R&D personnel and employment in research activities (NACE 72), applied to NACE 72 employment in Iparralde.
Source: EUSTAT, Eurostat. Compiled by Gaindegia.

R&D personnel, by territory. Basque Country, 2023 (% of total employment)



Note: BAC: EUSTAT; Navarre: Eurostat. The Iparralde figure is an estimate: a regression model fitted on French regions between R&D personnel and employment in research activities (NACE 72), applied to NACE 72 employment in Iparralde.
Source: EUSTAT, Eurostat. Compiled by Gaindegia.

[12] R&D expenditure: gross domestic expenditure on research and development performed in the territory (business enterprise, government, higher education and private non-profit sectors), as a share of GDP.

[13] R&D personnel: people engaged in research and development (researchers, technicians and support staff), in full-time equivalents (FTE), as a share of total employment.

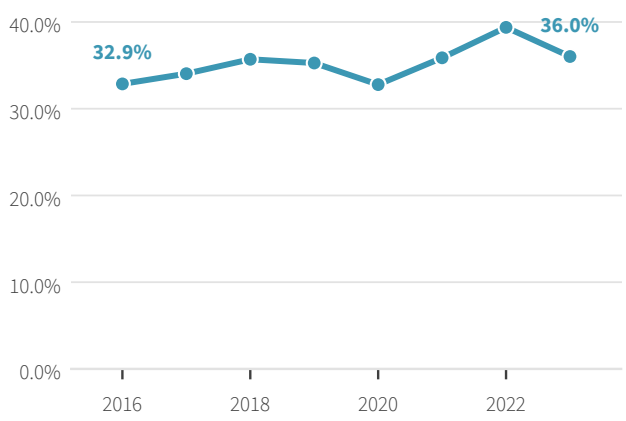
2.4
EXTERNAL TRADE

Exports of goods amount to 36% of GDP, and the trade balance is positive

In 2023, the Basque Country exported goods abroad worth 44,027 million euros, 36% of GDP. This ratio was 32.9% in 2016 and peaked at 39.4% in 2022. Araba is the most export-oriented territory (73%), followed by Navarre (41.1%), Gipuzkoa (35.3%) and Bizkaia (28.1%). In Iparralde, only 9.7% (estimate).

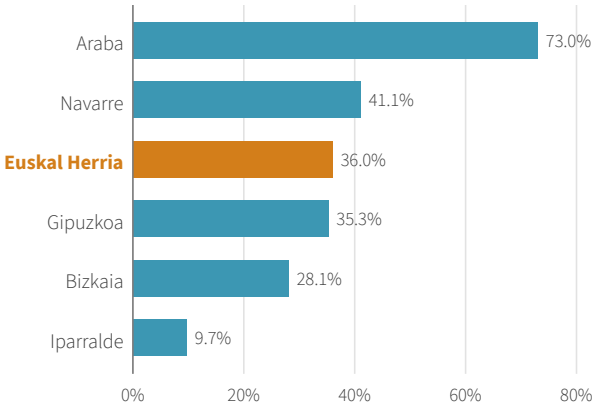
The trade balance in goods and services is positive in Hego Euskal Herria: 1.5% of GDP in 2024. The balance with other countries is clearly positive (6.4%), and the balance with the rest of the state is negative (-4.9%). Navarre has a larger surplus (5.9%) than the Basque Autonomous Community (0.2%).

Exports of goods abroad. Basque Country, 2016-2023 (% of GDP)



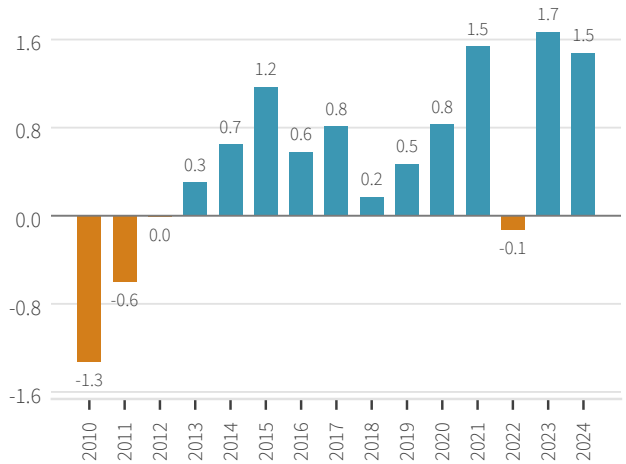
Source: EUSTAT, NASTAT, Douanes, Eurostat. Compiled by Gaindegia.

Exports of goods abroad, by territory. Basque Country, 2023 (% of GDP)



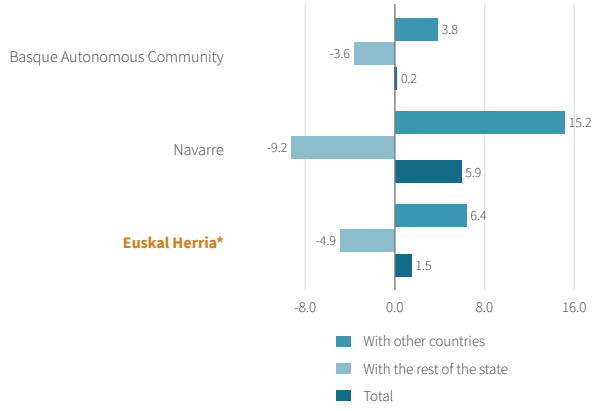
Note: Customs data: goods, with other countries only. The Iparralde figure is an estimate: départemental exports (Douanes), scaled according to Iparralde's share of the département's industry.
Source: EUSTAT, NASTAT, Douanes, Eurostat. Compiled by Gaindegia.

Trade balance (goods and services). Euskal Herria*, 2010-2024 (% of GDP)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: EUSTAT, NASTAT, Eurostat. Compiled by Gaindegia.

Trade balance, by partner area and territory. Euskal Herria*, 2024 (% of GDP)



Source: EUSTAT, NASTAT, Eurostat. Compiled by Gaindegia.

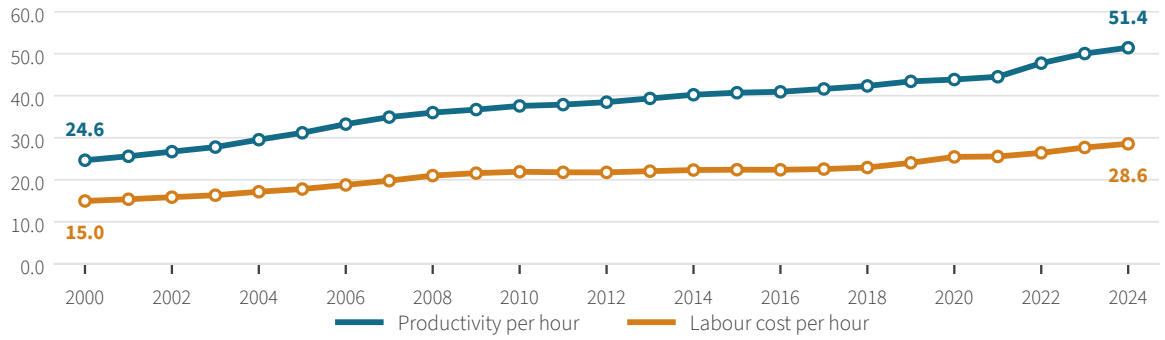
2.5 LABOUR: PRODUCTIVITY, WAGES AND CARE

In Hego Euskal Herria, real productivity has practically stagnated since 2015, and unit labour cost has risen by 23.4%

In Hego Euskal Herria, labour productivity per hour worked[14] is 51.4 euros (2024, at current prices), and hourly labour cost 28.6 euros (22.4 in 2015). Real productivity[15] has barely grown over the last decade: by 3.7% since 2015, compared with 26% over the period 2000-2015. Unit labour cost[16] has risen by 23.4% since 2015 (17.5% since 2019).

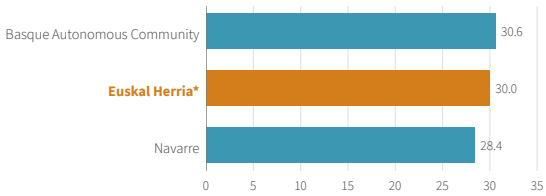
In manufacturing, hourly labour cost is 30 euros in Hego Euskal Herria (2024): 30.6 in the Basque Autonomous Community and 28.4 in Navarre. The labour share of value added[17] has barely changed: in Hego Euskal Herria it is 61% for the economy as a whole (60.6% in 2015) and 58.2% in manufacturing (65.8% in 2008).

Labour productivity and labour cost per hour worked, total economy. Euskal Herria*, 2000-2024 (euros per hour, current prices)



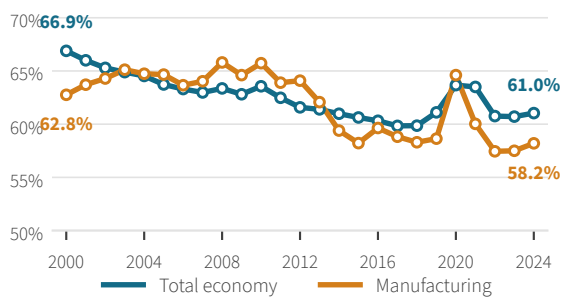
Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. Both in nominal terms, at current prices.
Source: Eurostat (regional accounts). Compiled by Gaindegia.

Hourly labour cost in manufacturing, by territory. Euskal Herria*, 2024 (euros per hour)



Note: Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre); for Iparralde there are no data based on its own information. The Euskal Herria* figure is calculated by adding up the compensation and hours of both areas.
Source: INSEE, Eurostat. Compiled by Gaindegia.

Labour share of value added. Euskal Herria*, 2000-2024 (%, imputing the labour of the self-employed)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: Eurostat (regional accounts). Compiled by Gaindegia.

[14] Labour productivity per hour: GDP (current prices) / hours worked. Hourly labour cost: compensation of employees (D.1) / hours worked by employees.

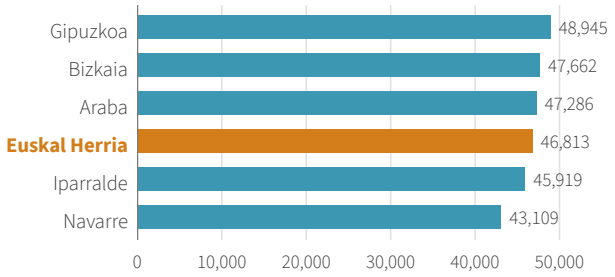
[15] Real labour productivity: GDP at constant prices / hours worked (index, 2015 = 100).

[16] Unit labour cost: hourly labour cost / real productivity (index, 2015 = 100).

[17] Labour share: compensation of employees (D.1) / gross value added, imputing the labour of the self-employed.

Compensation per employee (including employers' social contributions) is 46,813 euros in the Basque Country (2024). It is highest in Gipuzkoa (48,945) and lowest in Navarre (43,109); in Iparralde, 45,919. Since 2015 it has grown by 22% in nominal terms in Euskal Herria: more in Navarre (26.8%) and less in Araba (18.4%).

Compensation of employees per employee, by territory. Basque Country, 2024 (euros per year)



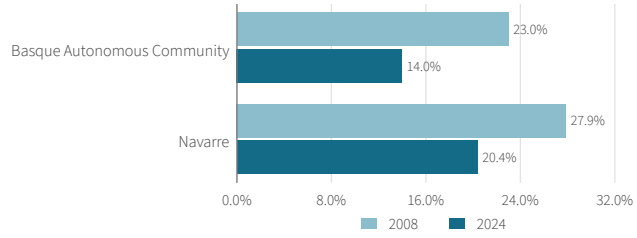
Note: The figures for the Basque Country and Iparralde are estimates. Iparralde: estimated from INSEE data for 158 municipalities, updated with the trend for France. Araba, Bizkaia and Gipuzkoa: EUSTAT; Navarre: Eurostat. The difference between EUSTAT and Eurostat for the BAC is not stable (+11-12% in 2015-2019 and +6% in 2020-2024; methodological break in 2019/2020); as a result, the gap between the BAC and Navarre is larger with the published data (11.4%, 2024) than on a consistent basis (5.1%, Eurostat), and the narrowing of the published gap (from 16.5% to 11.4%) does not appear on a consistent basis.
Source: EUSTAT, INSEE, Eurostat. Compiled by Gaindegia.

Each employee received 46,813 euros in Euskal Herria in 2024.

The gender pay gap[18] has narrowed, but has not disappeared: in the Basque Autonomous Community, women's annual gross earnings are 14% lower than men's (23% in 2008); in Navarre, 20.4% (27.9% in 2008).

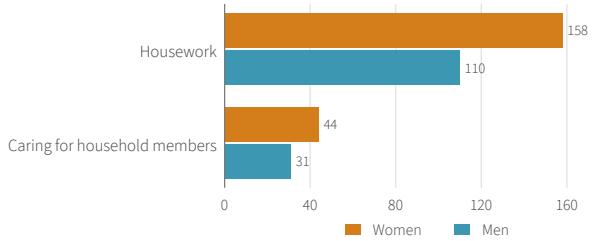
Behind the gap lies the unequal sharing of housework and care[19]. In 2023, women in the BAC spent 158 minutes a day on housework and 44 on caring for household members; men, 110 and 31. In housework the gap has narrowed considerably since 1993 (when women spent 256 minutes and men 63), but, taking both activities together, women spend 7.1 more hours a week on housework and care.

Gender pay gap. Basque Autonomous Community and Navarre, 2008 and 2024 (%)



Note: INE, Wage Structure Survey.
Source: INE (Wage Structure Survey). Compiled by Gaindegia.

Time spent on housework and care, by sex. Basque Autonomous Community, 2023 (minutes per day)



Note: Average for the whole population (including people who do not take part).
Source: EUSTAT (Time Use Survey). Compiled by Gaindegia.

Women spend 7.1 more hours a week on housework and care, taking both activities together (BAC, 2023).

[18] Gender pay gap: difference between the average annual gross earnings of men and women, as a share of men's earnings.

[19] Housework: cooking, cleaning, laundry, shopping and household management. Care: looking after children, older people and dependent household members. The two activities are measured separately.

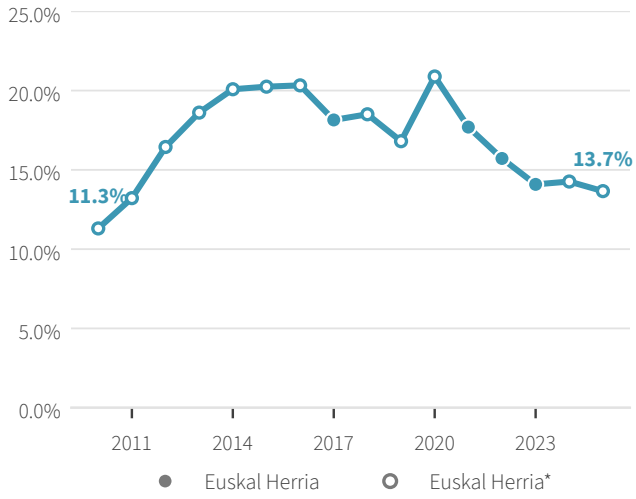
2.6
PUBLIC DEBT

General government debt stands at 14.1% of GDP, below the 2020 peak

The public debt of the regional governments and local authorities (municipalities, provincial councils), as defined under the Excessive Deficit Procedure[20], was 14.1% of GDP in the Basque Country in 2023 (17,427 million euros). It peaked in 2020 (20.9%, Hego Euskal Herria), and has fallen since then: 13.7% in 2025 (Hego Euskal Herria).

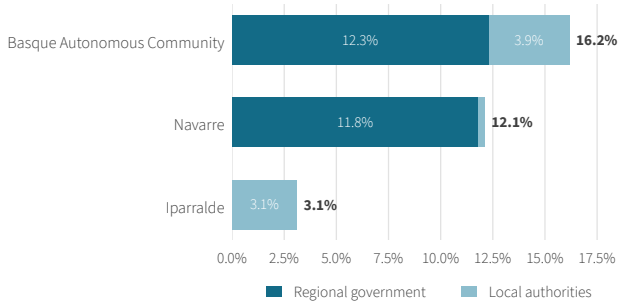
Most of the debt is held by the regional governments. In the Basque Autonomous Community, debt amounts to 16.2% of GDP (of which 3.9% is local government debt); in Navarre, 12.1%; in Iparralde there is only local government debt, 3.1%. At local level, Bizkaia has the highest debt (5%) and Navarre the lowest (0.3%).

Public debt: regional governments and local authorities. Basque Country, 2010-2025 (% of GDP)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: Banco de España, Spanish Ministry of Finance, DGFiP. Compiled by Gaindegia.

Public debt, by level of government. Basque Country, 2023 (% of GDP)



Note: In Iparralde, municipalities and the Communauté d'agglomération Pays Basque (CAPB); there is no regional-level government.
Source: Banco de España, Spanish Ministry of Finance, DGFiP. Compiled by Gaindegia.

In 2020 public debt stood at 20.9% of GDP; in 2023, at 14.1%.

[20] Debt as defined under the Excessive Deficit Procedure (EDP): gross general government debt, at nominal value, consolidated between government subsectors.

SUMMARY

A prosperous, industry-based economy. GDP per capita is 42,332 PPS, and industry generates 24.1% of value added. Araba and Gipuzkoa are the most prosperous territories; in Iparralde, by contrast, services predominate.

Looking outwards. Exports of goods amount to 36% of GDP, and the trade balance with other countries is positive (6.4% in Hego Euskal Herria).

Stagnating productivity. In Hego Euskal Herria, real productivity per hour has grown by only 3.7% since 2015, and unit labour cost has increased by 23.4%; the share of wages in value added, however, has barely changed (61%). Compensation per employee is 46,813 euros in Euskal Herria.

Uneven innovation. R&D expenditure is 1.9% of GDP; Gipuzkoa invests 2.7%, and Iparralde 0.5%.

Work, housework and care. The gender pay gap has narrowed (14% in the BAC), but women spend 7.1 more hours a week on housework and care. Cooperatives employ 4.7% of employed persons. Public debt is 14.1% of GDP, below the 2020 peak.

Main economic indicators

Indicator	Value	Territorial coverage (year)	Trend
GDP per capita (PPS)	42,332	Euskal Herria (2023)	▲ Rising
Share of industry in gross value added (%)	24.1%	Euskal Herria (2023)	● Stable
Average size of industrial establishments (persons employed)	18.2	Euskal Herria (2024)	▲ Rising
Employment in cooperatives (% of employed persons)	4.7%	Euskal Herria (2023)	● Stable
Net business demography balance (% of active enterprises)	0.4%	Euskal Herria (2023)	▼ Weakening
R&D expenditure (% of GDP)	1.93%	Euskal Herria (2023)	● Stable
R&D personnel (% of employment)	2.12%	Euskal Herria (2023)	▲ Rising
Exports of goods (% of GDP)	36.0%	Euskal Herria (2023)	▲ Rising
Trade balance (% of GDP)	1.5%	Euskal Herria* (2024)	● Positive
Labour productivity (€)	51.4	Euskal Herria* (2024)	● Stagnant (real)
Unit labour cost (index, 2015 = 100)	123.4	Euskal Herria* (2024)	▲ Rising
Hourly labour cost in manufacturing (€)	30.0	Euskal Herria* (2024)	▲ Rising
Compensation of employees per employee (€)	46,813	Euskal Herria (2024)	▲ Rising (nominal)
Gender pay gap (%)	14.0%	Basque Autonomous Community (2024)	▼ Narrowing
Public debt (% of GDP)	14.1%	Euskal Herria (2023)	▼ Falling

Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: EUSTAT, NASTAT, INE, INSEE, Banco de España, Eurostat. Compiled by Gaindegia.



3 SOCIETY

More employment and education than ever, but prices and the risk of poverty are not easing

In Hego Euskal Herria, 71.9% of the population aged 15-64 is employed (2025), the highest rate on record, and 56.4% of people aged 25-64 have tertiary education. Disposable income has grown, but prices have risen by 18.8% since 2021, and 15.1% of the population is at risk of poverty or social exclusion. Social protection expenditure and gender equality vary from one territory to another.

71.9%

employment rate, aged 15-64 (Euskal Herria*, 2025)

56.4%

tertiary education, aged 25-64 (Euskal Herria*, 2025)

+18.8%

price increase, 2021-2025 (Euskal Herria*)

15.1%

at risk of poverty or social exclusion, AROPE (Euskal Herria*, 2025)

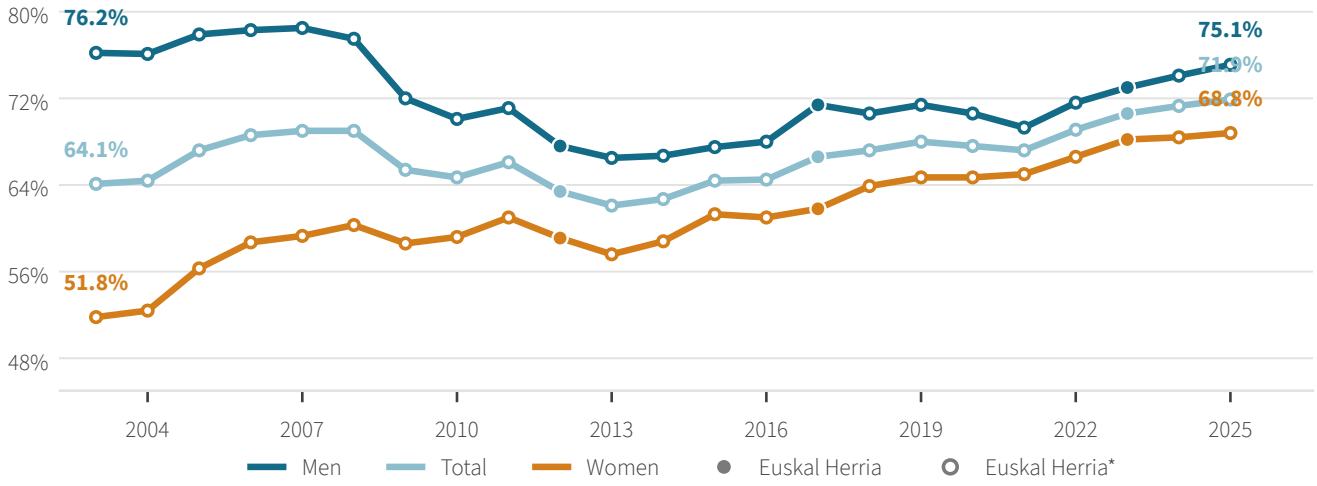
3.1
WORK AND EDUCATION

The employment rate is at its highest level and the gap between women and men has shrunk to a quarter

In Hego Euskal Herria, 71.9% of the population aged 15 to 64 was employed in 2025, the highest rate in the series. The peak before the 2008 crisis (69%) has been surpassed; according to the census data for 2023, the rate was 70.6% for Euskal Herria as a whole, and it has risen by almost ten points since the 2013 low (62.1%).

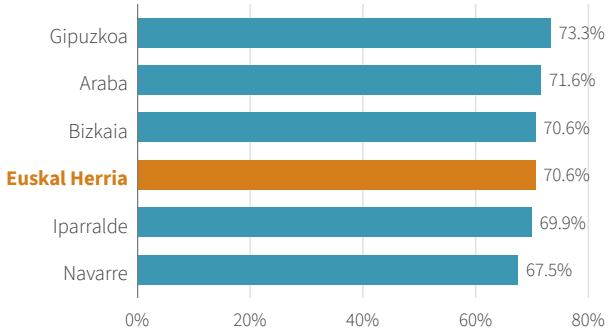
Gipuzkoa has the highest employment rate (74.8%) and Navarre the lowest (69.5%); in Iparralde, 69.9% (2023). The gap between women and men has fallen from 24.4 points (2003) to 6.3 points, and the employment rate of people aged 55-64 has risen from 39.3% to 66.4%.

Employment rate (aged 15-64), by sex. Basque Country, 2003-2025 (%)



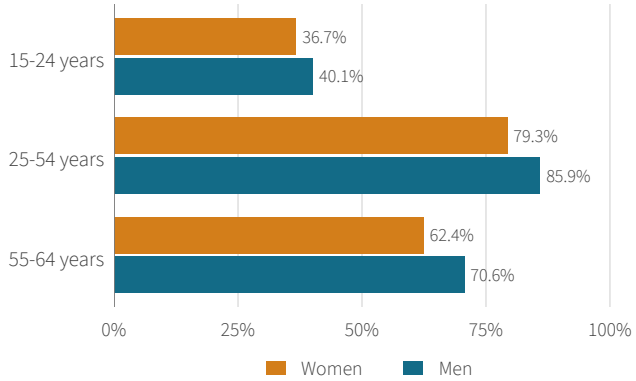
Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. Data for Euskal Herria as a whole refer to census years (2012, 2017, 2023); the rest, Euskal Herria*.
Source: EUSTAT, INSEE, Eurostat (LFS). Compiled by Gaindegia.

Employment rate (aged 15-64), by territory. Basque Country, 2023 (%)



Source: EUSTAT, INSEE, Eurostat (LFS). Compiled by Gaindegia.

Employment rate, by age group and sex. Euskal Herria*, 2025 (%)

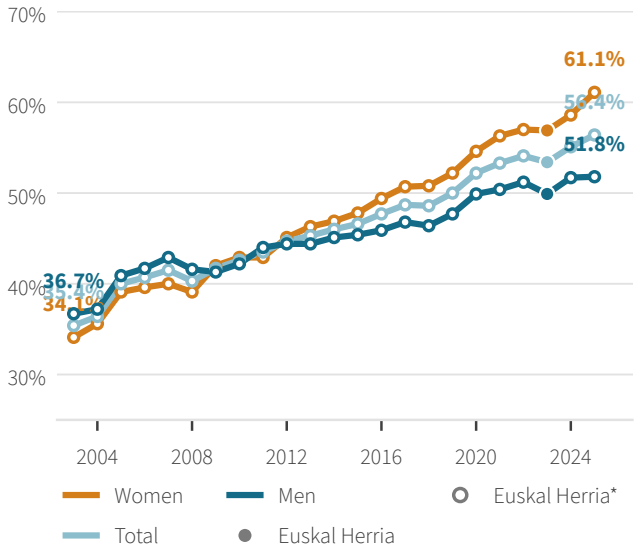


Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: EUSTAT, Eurostat (LFS). Compiled by Gaindegia.

People aged 25-64 with tertiary education[21] account for 56.4% in Hego Euskal Herria (2025), 21 points more than in 2003 (35.4%). Women have a much higher level of attainment than men: 61.1%, compared with 51.8% among men.

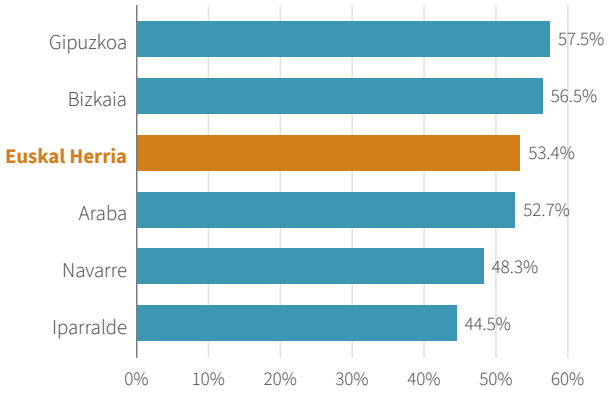
Differences between territories are considerable. In 2023, Gipuzkoa (57.5%) and Bizkaia (56.5%) were in the lead; Navarre (48.3%) and, above all, Iparralde (44.5%) lagged behind. For the Basque Country as a whole, 53.4%.

People aged 25-64 with tertiary education, by sex. Basque Country, 2003-2025 (%)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: EUSTAT, INSEE, Eurostat. Compiled by Gaindegia.

People aged 25-64 with tertiary education, by territory. Basque Country, 2023 (%)



Note: Iparralde: INSEE, population census.
Source: EUSTAT, INSEE, Eurostat. Compiled by Gaindegia.

In Hego Euskal Herria, 61.1% of women aged 25-64 have tertiary education; among men, 51.8%.

[21] Tertiary education: ISCED levels 5-8 (short-cycle tertiary, bachelor's, master's and doctoral levels).



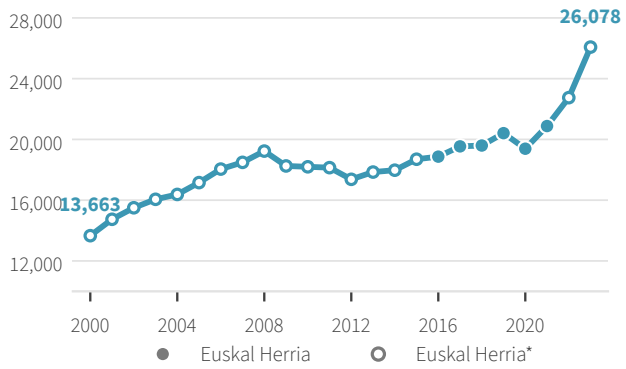
3.2
INCOME, PRICES AND INEQUALITY

Income has grown, but prices have risen by almost 19% since 2021

Disposable household income[22] is 26,078 PPS per inhabitant in Hego Euskal Herria (2023): 26,800 in the BAC and 23,700 in Navarre. It has grown strongly since the 2012 low (17,373), and by 14.6% in the last year alone. In 2021, including Iparralde, income in the Basque Country was 20,880 PPS, and income in Iparralde (19,163) was similar to that in Navarre.

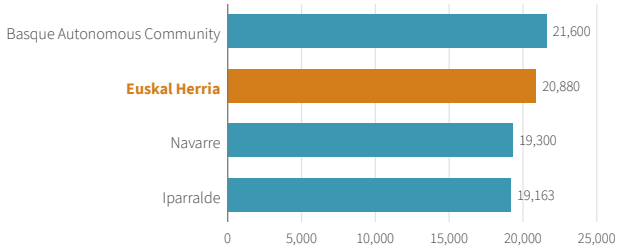
Rising prices have eaten up much of the growth in income. Consumer prices rose by 18.8% in Hego Euskal Herria from 2021 to 2025; in 2022, by 8.2% in a single year. In 2025, inflation was 2.9% in Hegoalde.

Disposable household income per inhabitant. Basque Country, 2000-2023 (PPS)



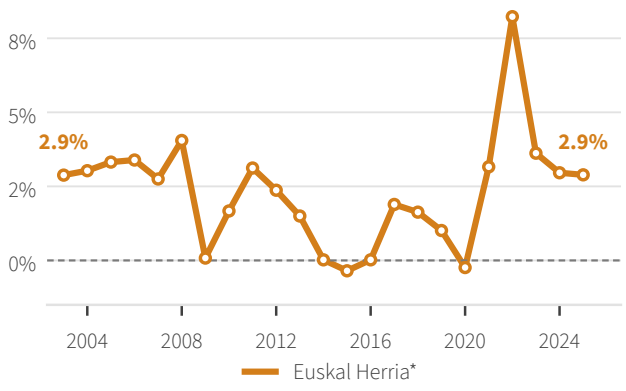
Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: INSEE, Eurostat. Compiled by Gaindegia.

Disposable household income per inhabitant, by territory. Basque Country, 2021 (PPS)



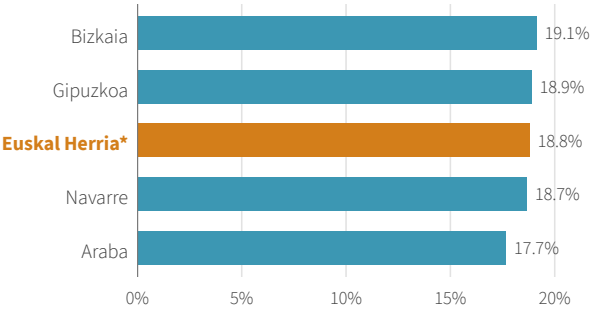
Note: The Iparralde figure is an estimate (INSEE FILOSOFI). Eurostat shows a large jump in 2023, partly due to the update of purchasing power parities.
Source: INSEE, Eurostat. Compiled by Gaindegia.

Annual change in consumer prices. Euskal Herria*, 2004-2025 (%)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: INE (CPI). Compiled by Gaindegia.

Cumulative change in consumer prices, by territory. Euskal Herria*, 2021-2025 (%)



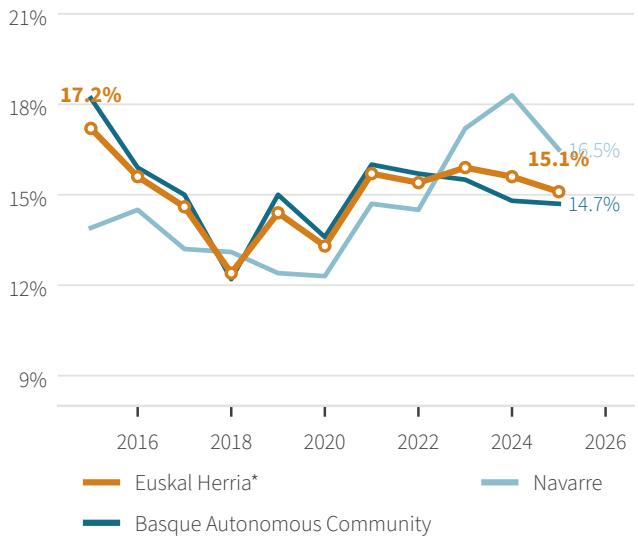
Note: Hegoalde: INE CPI. There is no separate index for Iparralde.
Source: INE (CPI). Compiled by Gaindegia.

[22] Disposable household income: the income available to households for spending or saving after paying taxes and social contributions and receiving social benefits.

People at risk of poverty or social exclusion (AROPE[23]) make up 15.1% of the population in Hego Euskal Herria (2025), less than in 2015 (17.2%). The trends, however, are opposite: in the BAC the rate has fallen (14.7%), while in Navarre it has risen from 12.4% (2019) to 16.5%. The EUSTAT survey (EPDS) gives a higher figure for the BAC: 20.6% (2024).

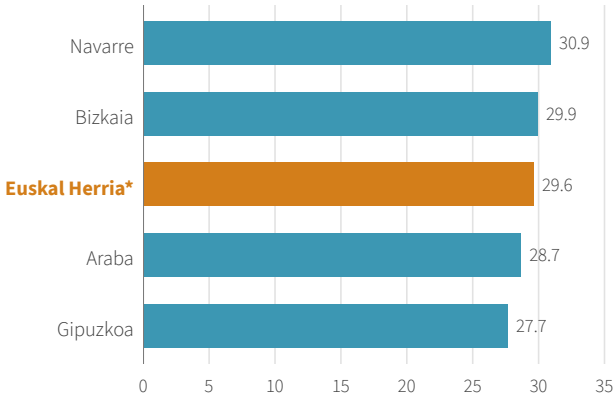
Income inequality is moderate: the Gini coefficient[24] is 29.6 in Hego Euskal Herria (2023). Gipuzkoa is the most equal territory (27.7) and Navarre the most unequal (30.9); in Iparralde, 28.9 (2021). Among municipalities with more than 20,000 inhabitants, Getxo (33.6) and Errenteria (24.7) are at the extremes.

At risk of poverty or social exclusion (AROPE). Euskal Herria*, 2015-2025 (%)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. Eurostat, EU-SILC (EU 2030 definition); Euskal Herria*, weighted by population. No data for Iparralde.
Source: Eurostat (EU-SILC). Compiled by Gaindegia.

Gini coefficient, by territory. Euskal Herria*, 2023 (0-100)

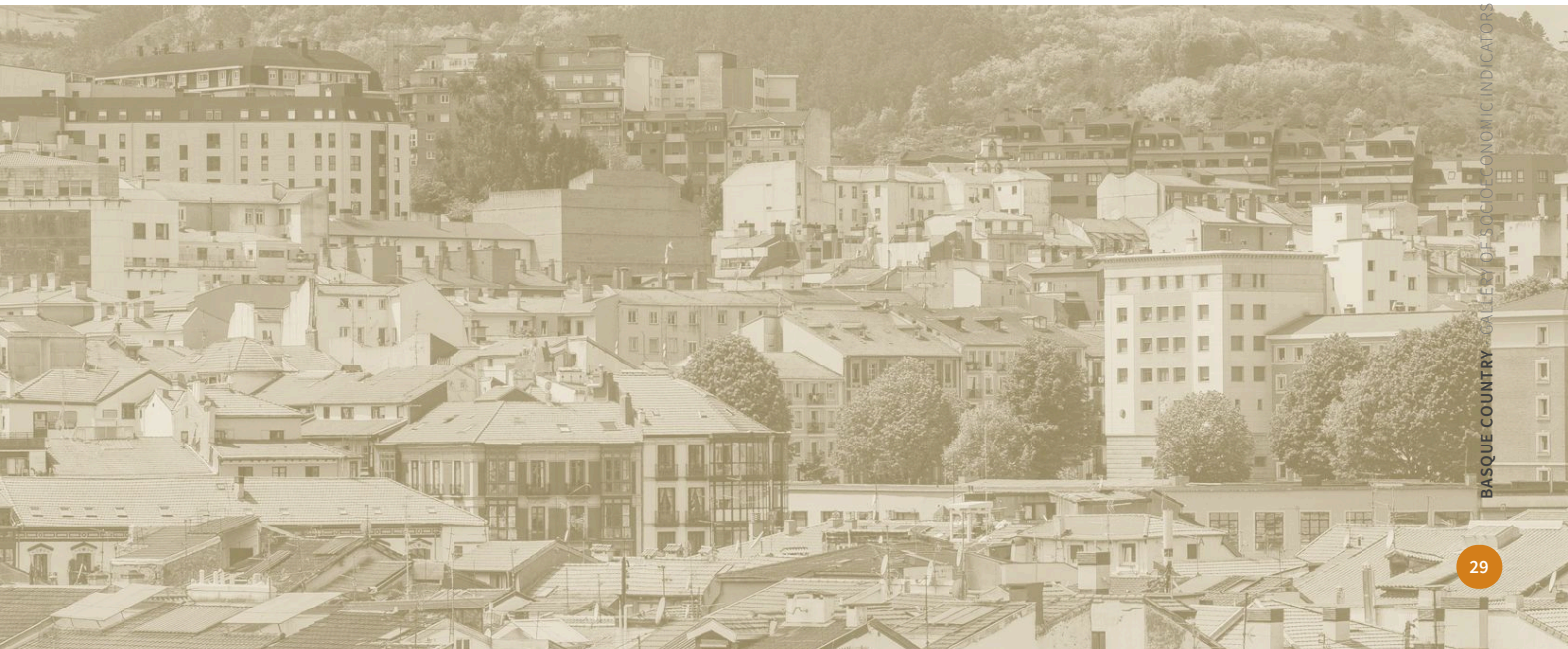


Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. INE Household Income Distribution Atlas (aggregating municipal distributions). In Iparralde, 28.9 (2021, INSEE FILOSOFI).
Source: INE (Household Income Distribution Atlas). Compiled by Gaindegia.

In Navarre, the proportion of people at risk of poverty or social exclusion has gone from 12.4% to 16.5% since 2019.

[23] AROPE (EU 2030 definition): people at risk of poverty (equivalised income below 60% of the national median), severely materially and socially deprived, or living in households with very low work intensity.

[24] Gini coefficient: inequality in the distribution of income, from 0 (perfect equality) to 100 (perfect inequality).



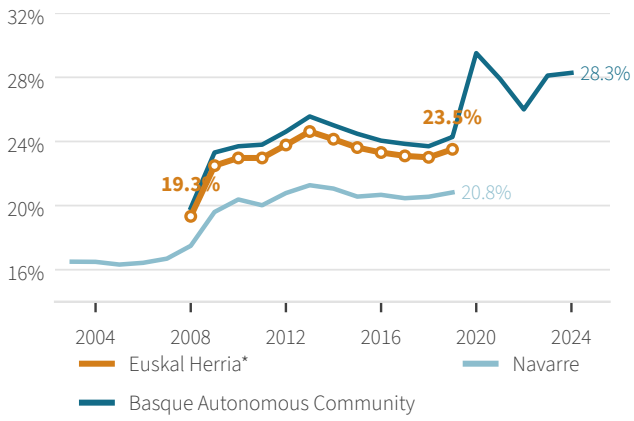
3.3
SOCIAL PROTECTION, EQUALITY AND WELL-BEING

The BAC devotes 28% of GDP to social protection; life satisfaction stands at 7.4

Social protection expenditure[25] amounts to 28.3% of GDP in the Basque Autonomous Community (2024), 8 points more than in 2008 (19.9%). The pandemic pushed it to its peak (29.5% in 2020). In Navarre it was 20.8% in 2019, the latest published figure; in Hego Euskal Herria, 23.5%.

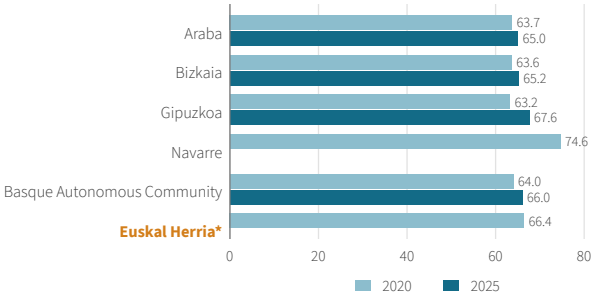
The Gender Equality Index[26] stands at 66 in the BAC in EUSTAT's 2025 edition, 2 points more than in the 2020 edition; Gipuzkoa has made the most progress (from 63.2 to 67.6). In the 2020 edition, Navarre scored 74.6, and Hego Euskal Herria 66.4 (approximation). The edition year is not the reference year of the data (which are 2-3 years older), and the methodology has been revised between editions.

Social protection expenditure. Euskal Herria*, 2003-2024 (% of GDP)



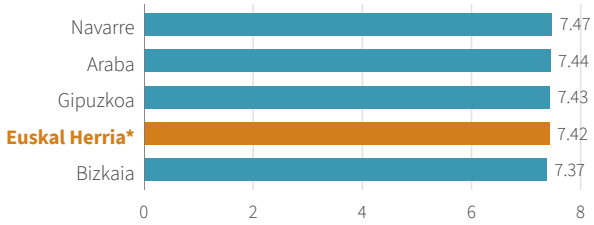
Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. EUSTAT and NASTAT (ESSPROS); the latest figure for Navarre is for 2019. No data for Iparralde.
Source: EUSTAT, NASTAT. Compiled by Gaindegia.

Gender Equality Index, by territory. Euskal Herria*, 2020 and 2025 editions (0-100)



Note: EUSTAT, NASTAT. Year = edition: the data are 2-3 years older; there is a break between editions. Euskal Herria*: weighted mean of the BAC and Navarre (approximation). There is no equivalent index for Iparralde.
Source: EUSTAT, NASTAT. Compiled by Gaindegia.

Life satisfaction, by territory. Euskal Herria*, 2024 (mean, 0-10)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. BAC: EUSTAT, Personal Well-being Survey. Navarre: INE, Living Conditions Survey. No data for Iparralde.
Source: EUSTAT, INE. Compiled by Gaindegia.

Life satisfaction is high and stable: 7.42 on a 0-10 scale in Hego Euskal Herria (2024). Differences between territories are small (Bizkaia 7.37, Navarre 7.47), and in the BAC it has risen from 7.08 (2014) to 7.40.

[25] Social protection expenditure (ESSPROS): expenditure of social protection schemes on pensions, health, unemployment, family, housing and social exclusion, as a share of GDP.

[26] Gender Equality Index (EIGE methodology): equality between women and men in six domains (work, money, knowledge, time, power and health), from 1 to 100 (100 = full equality).

SUMMARY

Employment at record highs. The employment rate is 71.9% in Hego Euskal Herria (aged 15-64), the highest in the series, and the gap between women and men has fallen to 6.3 points. Gipuzkoa leads; Navarre and Iparralde lag behind.

A highly educated population, led by women. In Hego Euskal Herria, 56.4% of people aged 25-64 have tertiary education; among women, 61.1%. Iparralde (44.5%) is the territory lagging behind.

Income is rising, but so are prices. Disposable income is 26,078 PPS per inhabitant in Hego Euskal Herria, but prices have risen by 18.8% since 2021.

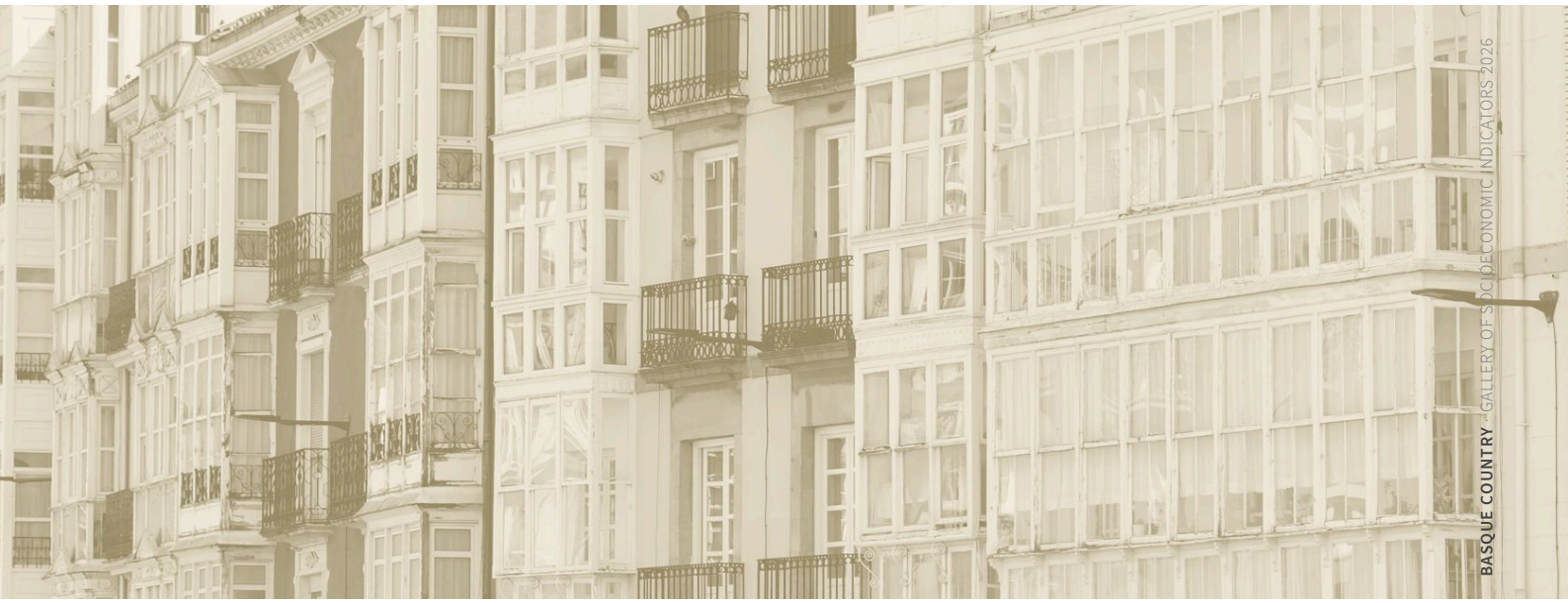
Moderate poverty and inequality. In Hego Euskal Herria, 15.1% of the population is at risk of poverty or social exclusion, but in Navarre the rate has increased (16.5%). The Gini coefficient is 29.6.

Protection and well-being. The BAC devotes 28.3% of GDP to social protection. The Gender Equality Index stands at 66 in the BAC, and life satisfaction at 7.42 in Hego Euskal Herria.

Main social indicators

Indicator	Value	Territorial coverage (year)	Trend
Employment rate, aged 15-64 (%)	70.6%	Euskal Herria (2023)	▲ Rising
Cumulative change in consumer prices since 2021 (%)	18.8%	Euskal Herria* (2021-2025)	▲ Rising (slowing)
Social protection expenditure (% of GDP)	28.3%	Basque Autonomous Community (2024)	▲ Rising
Tertiary education, aged 25-64 (%)	53.4%	Euskal Herria (2023)	▲ Rising
Life satisfaction (0-10)	7.42	Euskal Herria* (2024)	● Stable
Gender Equality Index (0-100, edition)	66.0	Basque Autonomous Community (2025)	▲ Improving
Disposable household income per inhabitant (PPS)	20,880	Euskal Herria (2021)	▲ Rising
At risk of poverty or social exclusion, AROPE (%)	15.1%	Euskal Herria* (2025)	▼ Falling (rising in Navarre)
Gini coefficient (0-100)	32.2	Euskal Herria (2021)	▼ Falling

Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. Latest data for Euskal Herria* (excluding Iparralde): Employment rate, aged 15-64: 71.9% (2025); Tertiary education, aged 25-64: 56.4% (2025); Disposable household income per inhabitant: 26,078 (2023); Gini coefficient: 29.6 (2023).
Source: EUSTAT, NASTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.



BASQUE COUNTRY · GALLERY OF SOCIOECONOMIC INDICATORS 2026



CULTURE AND LANGUAGES

Basque has spread among the younger generations, but use has not kept pace with knowledge

In Hego Euskal Herria there are 990,437 Basque speakers (2021), 36.1% of the population aged over 5; among those aged 10-14, 74.3%. Use is lower across the Basque Country as a whole: on the street, 12.6% of conversations are held in Basque, and at work, 30.9% of employed persons use it with their colleagues. In Hego Euskal Herria, culture accounts for 44,900 jobs, and in 2023 2,791 titles were published in Basque.

990,437

Basque speakers aged over 5 (Euskal Herria*, 2021)

36.1%

share of Basque speakers (Euskal Herria*, 2021)

30.9%

use Basque with work colleagues (Euskal Herria, 2021)

44,900

cultural employment (Euskal Herria*, 2025)

4.1
KNOWLEDGE OF BASQUE

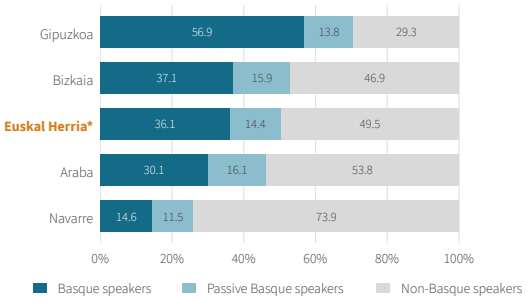
Basque speakers make up more than a third of the population aged over 5, and two in three among children and young people

In 2021, Hego Euskal Herria had 990,437 Basque speakers[27], 36.1% of the population aged over 5, and a further 395,163 passive Basque speakers (14.4%). 41.4% of Basque speakers live in Bizkaia, and 39.7% in Gipuzkoa. In the Basque Autonomous Community there are 897,878, and in Navarre 92,559.

The share of speakers varies widely between territories: in Gipuzkoa 56.9% of the population speak Basque, in Bizkaia 37.1%, in Araba 30.1% and in Navarre 14.6%. Age makes the biggest difference: 74.3% of those aged 10-14 speak Basque, 26.3% of those aged 40-64 and 19.3% of people over 65.

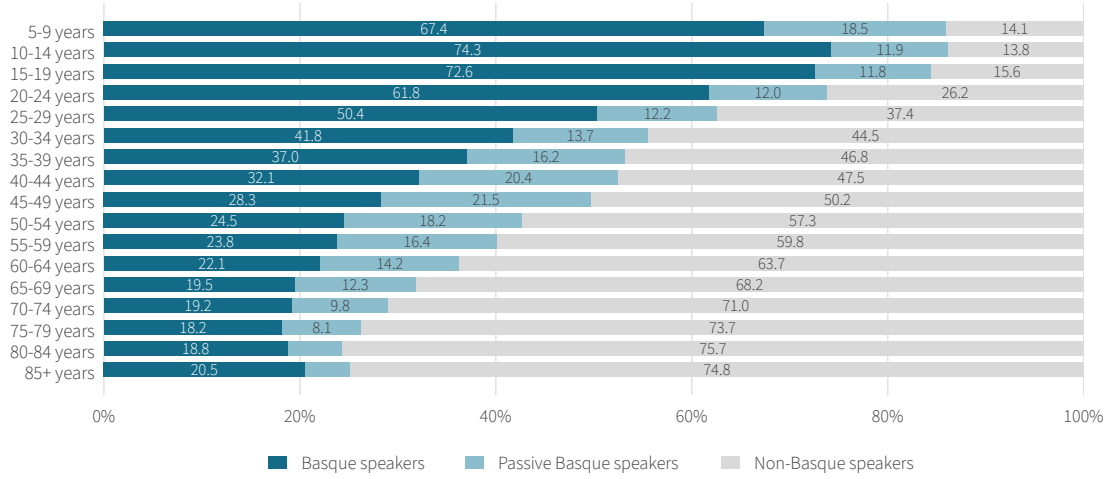
74.3% of those aged 10-14 speak Basque; among people over 65, 19.3%.

Population by language proficiency, by territory. Euskal Herria*, 2021 (% of the population aged over 5)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. No data for Iparralde: the French census does not include language questions.
Source: EUSTAT, NASTAT (2021 population censuses). Compiled by Gaindegia.

Population by language proficiency, by age group. Euskal Herria*, 2021 (%)

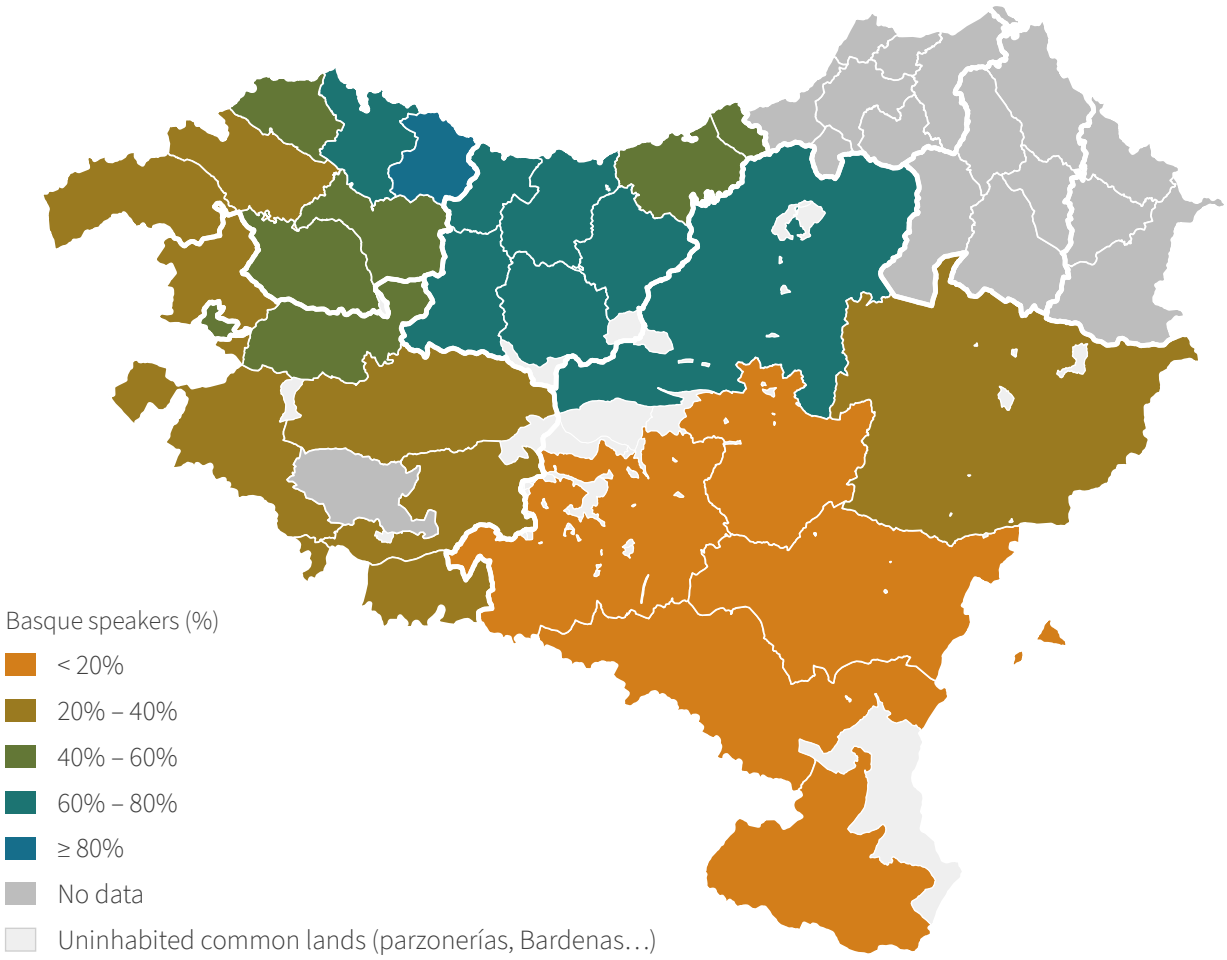


Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: EUSTAT, NASTAT (2021 population censuses). Compiled by Gaindegia.

[27] Basque speaker: a person who speaks Basque well; passive Basque speaker: a person who understands Basque well but does not speak it well (population aged over 5).

Differences between districts are even greater. In Lea Artibai, 80.1% of the population speak Basque, and in total 8 districts exceed 60%, in the area stretching from the coast of Bizkaia and Gipuzkoa to north-west Navarre. In the Ribera, by contrast, Basque speakers are a small minority: in Tuteraldea, 1.2%.

Share of Basque speakers, by district. Euskal Herria*, 2021 (% of the population aged over 5)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. Municipal figures aggregated by district (in Navarre, seven districts). No data for Iparralde: the French census does not include language questions.
Source: EUSTAT, NASTAT (2021 population censuses). Compiled by Gaindegia.

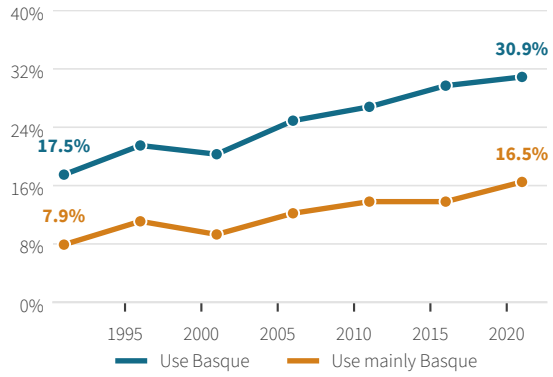
4.2
USE OF BASQUE

The number of people using Basque at work has almost doubled since 1991; on the street, use remains stable at 12-13%

According to the Sociolinguistic Survey, 30.9% of employed persons in the Basque Country used Basque with their work colleagues[28] in 2021, compared with 17.5% in 1991; those who use it predominantly rose from 7.9% to 16.5%. In Gipuzkoa, more than half of employed persons use it (55.4%); in Navarre (12.6%) and Iparralde (12%), far fewer. Araba is where it has grown most: from 5.8% to 25%.

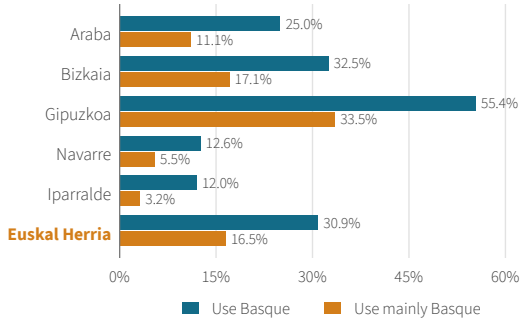
Use on the street[29], by contrast, has remained stable: in Euskal Herria, 12.6% of conversations are held in Basque (2021), below the 2006 peak (13.7%). Children use it the most (19.3%), and people over 65 the least (8.1%). In Gipuzkoa 30.6% of conversations are in Basque and in Bizkaia 9.4%; in Araba, Navarre and Iparralde, around 5%.

Use of Basque with work colleagues. Basque Country, 1991-2021 (%)



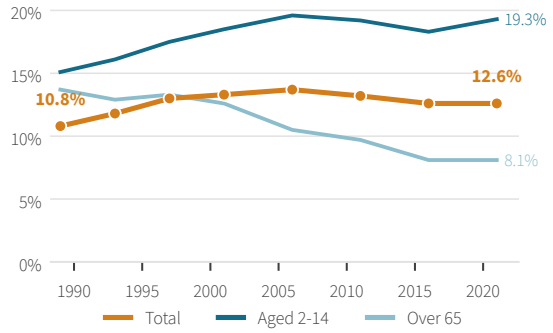
Note: Employed persons aged over 16.
Source: Basque Government, Government of Navarre, Office Public de la Langue Basque (Sociolinguistic Survey). Compiled by Gaindegia.

Use of Basque with work colleagues, by territory. Basque Country, 2021 (%)



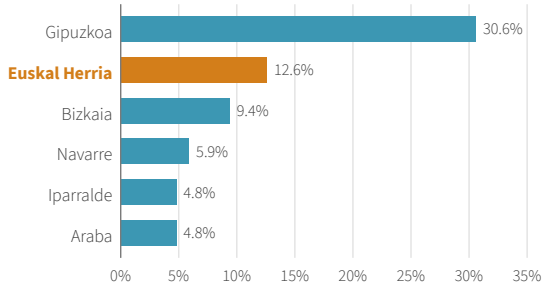
Source: Basque Government, Government of Navarre, Office Public de la Langue Basque (Sociolinguistic Survey). Compiled by Gaindegia.

Use of Basque on the street, by age group. Basque Country, 1989-2021 (% of conversations)



Source: Soziolinguistika Klusterra (Street Language Use Survey). Compiled by Gaindegia.

Use of Basque on the street, by territory. Basque Country, 2021 (% of conversations)



Source: Soziolinguistika Klusterra (Street Language Use Survey). Compiled by Gaindegia.

[28] Use with work colleagues: employed persons aged over 16; Basque users are those who use it predominantly and those who use Basque and Spanish/French equally or more Spanish/French.

[29] Use on the street: direct observation of conversations heard on the street; conversations in Basque as a share of the total.

4.3
CULTURE: EMPLOYMENT, EXPENDITURE AND BOOK PUBLISHING

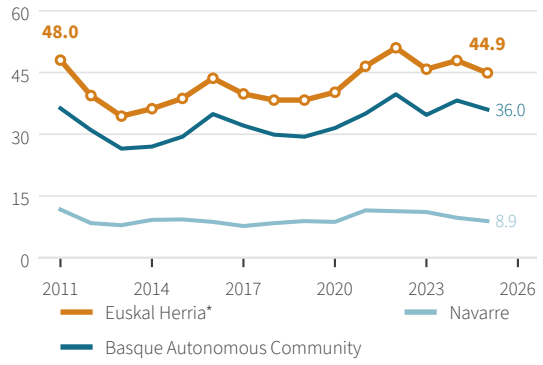
In Hego Euskal Herria, culture accounts for 44,900 jobs, and 216 euros per inhabitant are spent on it

Cultural employment stands at 44,900 people in Hego Euskal Herria (2025): 36,000 in the Basque Autonomous Community and 8,900 in Navarre. After the crisis it fell to 34,400 (2013), and in 2022 it peaked (51,000).

Outturn expenditure on culture by the regional governments and municipalities was 621.3 million euros in 2023, 216 euros per inhabitant: 225 in the BAC and 189 in Navarre. Municipalities account for most of the expenditure (61.4%), and since 2015 expenditure per inhabitant has grown by 47.1% in nominal terms.

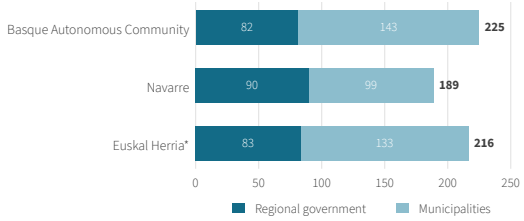
Book publishing in Basque has also grown: in 2023, 2,791 titles were published, 58.2% more than in 2000. The growth is due to the digital format: 955 digital titles (34.2%); print titles remain below the 2008 peak.

Cultural employment. Euskal Herria*, 2011-2025 (thousand persons)



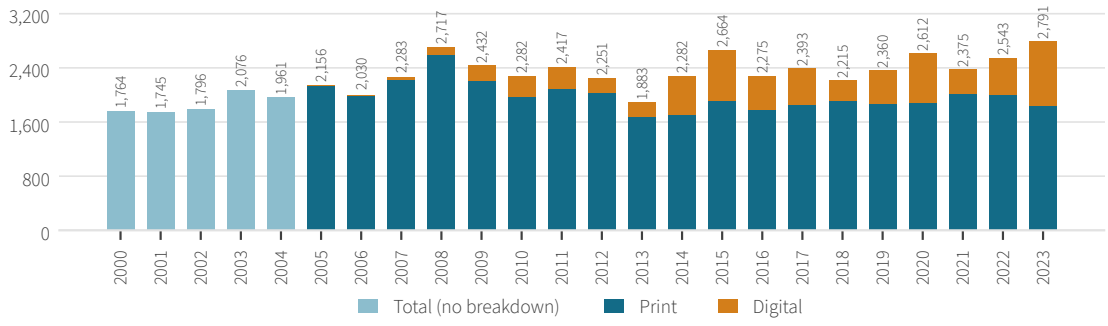
Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. Derived from the Labour Force Survey (small sample). No data for Iparralde.
Source: Spanish Ministry of Culture (CULTURAbase). Compiled by Gaindegia.

Public expenditure on culture per inhabitant (outturn), by level of government. Euskal Herria*, 2023 (euros)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. Current euros. No data for Iparralde.
Source: Spanish Ministry of Culture (CULTURAbase), INE. Compiled by Gaindegia.

Titles published in Basque, by format. Basque Country, 2000-2023 (number of titles)



Source: J. M. Torrealdai (annual reviews of book publishing in Basque). Compiled by Gaindegia.

SUMMARY

Knowledge, from generation to generation. In Hego Euskal Herria there are 990,437 Basque speakers, 36.1% of the population aged over 5; among those aged 10-14, 74.3%.

Territorial differences. In Gipuzkoa 56.9% of the population speak Basque, and in Navarre 14.6%. Differences are also large in use on the street and at work.

Use lags behind knowledge. On the street, 12.6% of conversations are in Basque, a stable figure; at work, 30.9% of employed persons use it with their colleagues (17.5% in 1991).

Culture. In Hego Euskal Herria, culture accounts for 44,900 jobs, and public administrations spend 216 euros per inhabitant. In 2023, 2,791 titles were published in Basque, a third of them digital.

Main culture and language indicators

Indicator	Value	Territorial coverage (year)	Trend
Knowledge of Basque: Basque speakers aged over 5 (number)	990,437	Euskal Herria* (2021)	▲ Rising among young people
Share of Basque speakers (%)	36.1%	Euskal Herria* (2021)	▲ Rising among young people
Cultural employment (persons)	44,900	Euskal Herria* (2025)	● Fluctuating
Public expenditure on culture per inhabitant (outturn) (€)	216	Euskal Herria* (2023)	▲ Rising
Titles published in Basque	2,791	Euskal Herria (2023)	▲ Rising (digital)
Use of Basque with work colleagues (%)	30.9%	Euskal Herria (2021)	▲ Rising
Use of Basque on the street (%)	12.6%	Euskal Herria (2021)	● Stable

Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: EUSTAT, NASTAT, Sociolinguistic Survey, Soziolinguistika Klusterra, J. M. Torrealdai, Spanish Ministry of Culture. Compiled by Gaindegia.





5 ENVIRONMENT

Progress on energy and emissions, but land, biodiversity and waste face major challenges

The economy of Hego Euskal Herria uses less energy per unit of GDP (20% less since 2014), but final energy consumption has grown by 17.9%; renewables account for 22.3% of final consumption. The environmental impact of anthropogenic emissions has fallen by 35.9% since 2005, but PM2.5 particulate matter exceeds the WHO guideline. In Euskal Herria, 76.6% of Natura 2000 network cases are in good status; in Hego Euskal Herria, 44.8% of municipal waste is collected separately.

22.3%

share of renewable energy (Euskal Herria*, 2023)

−35.9%

environmental impact of emissions, 2005-2022 (Basque Country)

8.3

µg/m³ PM2.5, WHO guideline: 5 (Euskal Herria, 2025)

76.6%

Natura 2000: good conservation status (Basque Country, 2024)

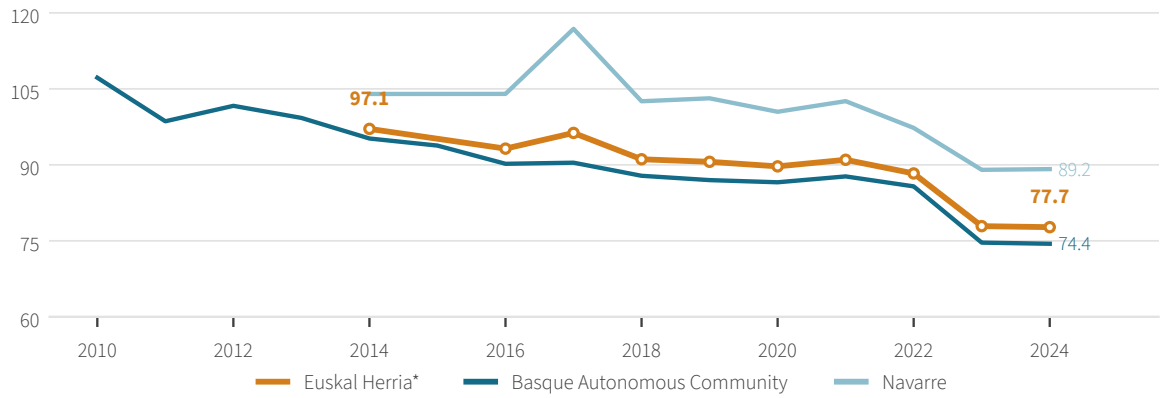
5.1 ENERGY

The economy uses less energy per unit of GDP, but total consumption has grown; renewables are advancing, driven by Navarre

Energy intensity[30] stands at 77.7 toe in Hego Euskal Herria (2024), 20% less than in 2014 (97.1). The Basque Autonomous Community needs 74.4 toe per million euros, and Navarre 89.2. The sharpest fall occurred in 2023. This fall is relative: final energy consumption was 7,798 ktoe in 2014 and 9,191 ktoe in 2024 (17.9% more); GDP has grown faster than consumption.

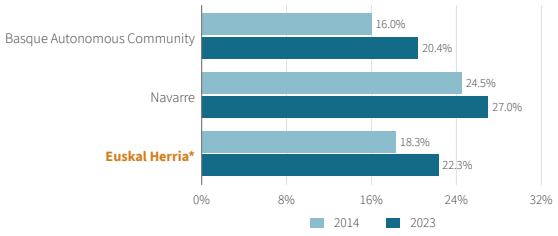
Renewable energy[31] accounts for 22.3% of gross final consumption in Hego Euskal Herria (2023; 18.3% in 2014). Navarre is ahead (28.3%, 2024), compared with the BAC (20.4%). The difference is even greater in installed capacity: Navarre has 3,688 renewable watts per inhabitant, 10.6 times more than the BAC (348). In Hego Euskal Herria the figure is 1,128 W per inhabitant, 70.4% more than in 2015.

Energy intensity. Euskal Herria*, 2010-2024 (toe per million euros of GDP)



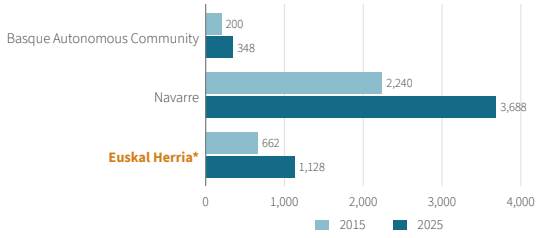
Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. No data for Iparralde.
Source: EUSTAT, Government of Navarre (energy balance), Eurostat (GDP). Compiled by Gaindegia.

Share of renewable energy in gross final energy consumption, by territory. Euskal Herria*, 2014 and 2023 (%)



Source: EUSTAT, Government of Navarre (energy balance). Compiled by Gaindegia.

Installed renewable electricity capacity, by territory. Euskal Herria*, 2015 and 2025 (watts per inhabitant)



Source: REE (REData), Eurostat (population). Compiled by Gaindegia.

Navarre has 10.6 times more renewable capacity per inhabitant than the BAC.

[30] Energy intensity: final energy consumption (in tonnes of oil equivalent, toe) per million euros of GDP.

[31] Share of renewable energy: gross final consumption of energy from renewable sources as a share of total gross final energy consumption.

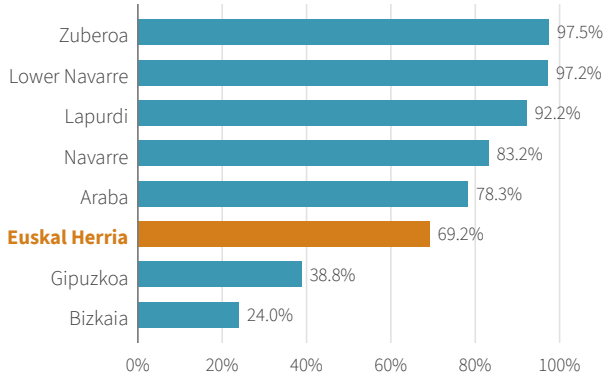
5.2
LAND AND BIODIVERSITY

Artificial land has grown by 10% since 2006, and plantations predominate in the forests of Bizkaia and Gipuzkoa

30.7% of the territory of Euskal Herria is forest, and 69.2% of those forests are natural. Differences are large: in Iparralde 96% are natural and in Navarre 83.2%, but in Bizkaia only 24% and in Gipuzkoa 38.8%, because plantations predominate.

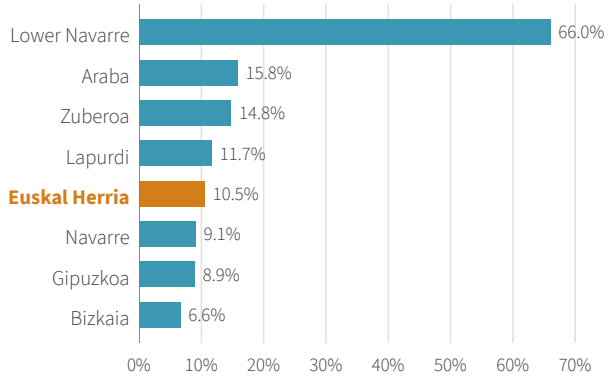
Artificial land[32] grew by 7,551 hectares over the period 2006-2018 (10.5%), and covers 4% of the territory of the Basque Country (2018); in Hego Euskal Herria, 3.7%. Most of the growth took place in 2006-2012 (9.6%); since 2012, only 0.9%. In Lapurdi 16.7% of the territory is artificial, and in Bizkaia 8.4%; in Zuberoa, only 0.8%. Araba is where it has grown most (15.8%).

Natural forests as a share of total forest, by territory. Basque Country, 2018-2024 (%)



Note: Latest forest map: BAC 2024, Navarre 2021, Iparralde 2018. Own classification (native species vs. plantations).
Source: Forest maps (Basque Government, Government of Navarre, IGN-F). Compiled by Gaindegia.

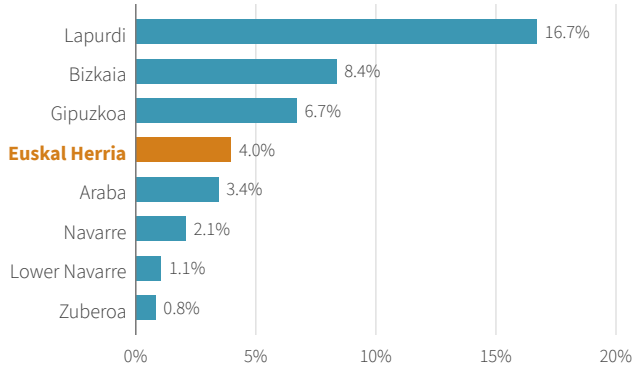
Growth in artificial land, by territory. Basque Country, 2006-2018 (%)



Source: Copernicus (CORINE Land Cover). Compiled by Gaindegia.

76.6% of Natura 2000 network cases are in good status, below the EU average (80.3%).

Artificial land as a share of total area, by territory. Basque Country, 2018 (%)



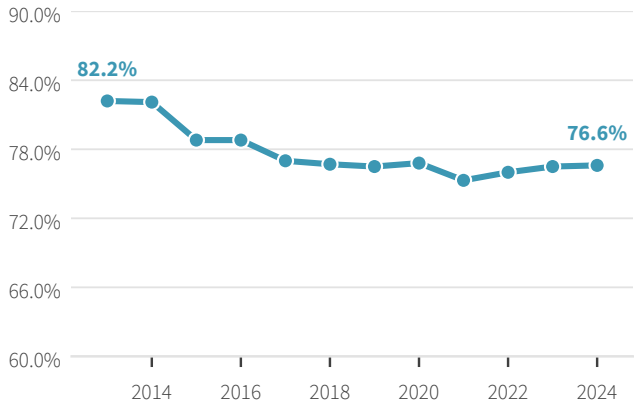
Source: Copernicus (CORINE Land Cover). Compiled by Gaindegia.

[32] Artificial land: urban areas, industrial and commercial areas, transport infrastructure, mines, dump sites and construction sites.

76.6% of the habitat and species cases of the Natura 2000 network are in good conservation status[33] in Euskal Herria (2024; 1,289 cases assessed), fewer than in 2013 (82.2%). Navarre (91.3%) is in the best position; the BAC (65.3%) and Iparralde (64.6%) lag behind.

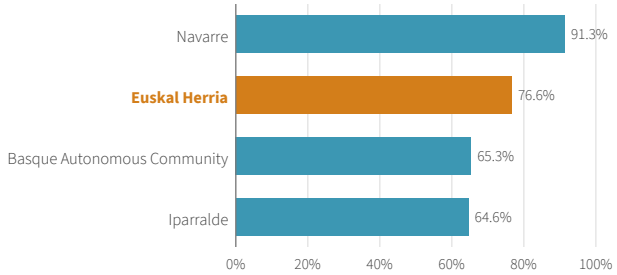
The ecological status of water bodies is improving in the BAC: 54.5% are in good status (2024; 47% in 2019). In the 2022 planning cycle, 67.2% of the rivers of Hego Euskal Herria were in good status: 71.8% in Gipuzkoa, 70.4% in Bizkaia and 58.1% in Araba.

Natura 2000: cases in good conservation status. Basque Country, 2013-2024 (%)



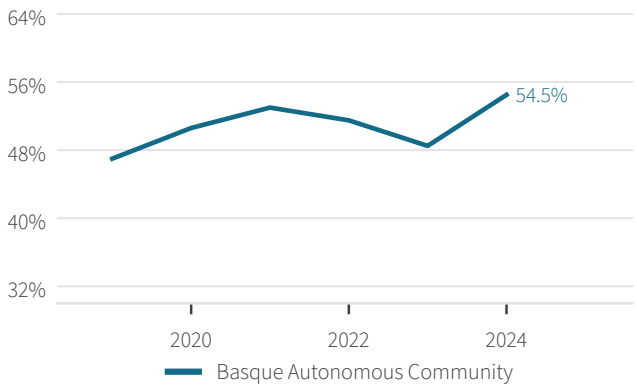
Source: EEA (Natura 2000, Standard Data Forms). Compiled by Gaindegia.

Natura 2000: cases in good conservation status, by territory. Basque Country, 2024 (%)



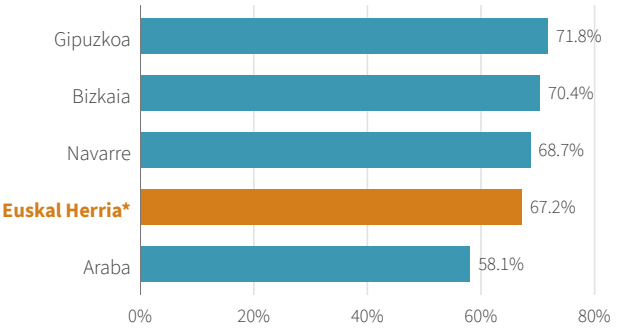
Source: EEA (Natura 2000, Standard Data Forms). Compiled by Gaindegia.

Water bodies in good ecological status. Basque Autonomous Community, 2019-2024 (%)



Source: URA (Basque Government). Compiled by Gaindegia.

Water bodies in good ecological status: rivers, by territory. Euskal Herria*, 2022 (%)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. The sources do not match: according to URA, 49.5% of rivers in the BAC were in good status in 2022; according to MITECO/WISE, 66.1%.
Source: MITECO / WISE (EEA). Compiled by Gaindegia.

[33] Conservation status (Natura 2000): cases of habitats and species with excellent (A) or good (B) conservation status, as a share of the cases assessed, with data collected when the sites were designated (Standard Data Forms).

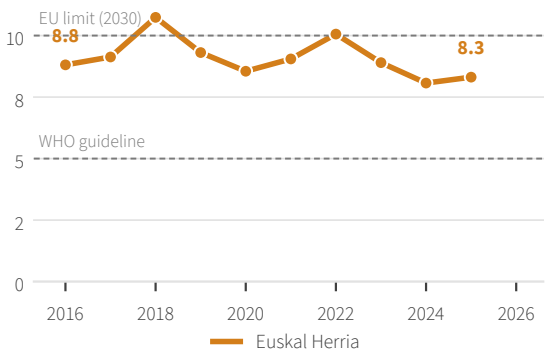
5.3
AIR AND ATMOSPHERE

The environmental impact of anthropogenic emissions has fallen by a third since 2005; PM2.5 particulate matter, however, exceeds the WHO guideline

The concentration of fine particulate matter PM2.5[34] to which the population is exposed is 8.3 µg/m³ in the Basque Country (2025), below the 2018 peak (10.7 µg/m³) and the limit set by the EU for 2030 (10 µg/m³). However, it is 1.7 times the World Health Organization guideline (5 µg/m³). Araba (8.9 µg/m³), Navarre (8.8 µg/m³) and Bizkaia (8.6 µg/m³) record the highest concentrations; Zuberoa (6.5 µg/m³), the lowest.

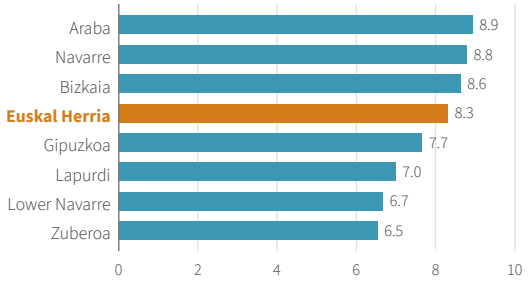
The environmental impact of anthropogenic emissions (IAI[35]) fell by 35.9% over the period 2005-2022: from 1,856 thousand person equivalents to 1,190 thousand. The largest fall occurred between 2007 and 2009 (17.2%: from 1,832 thousand to 1,517 thousand), in parallel with the economic crisis and the decline in the share of industry (see 2.1). Gipuzkoa saw the largest fall (61.4%), and Navarre the smallest (20.9%). Per inhabitant, the impact in Navarre (0.65 person equivalents) is twice that of the BAC (0.30 person equivalents).

PM2.5 concentration (population exposure). Basque Country, 2016-2025 (µg/m³, mean)



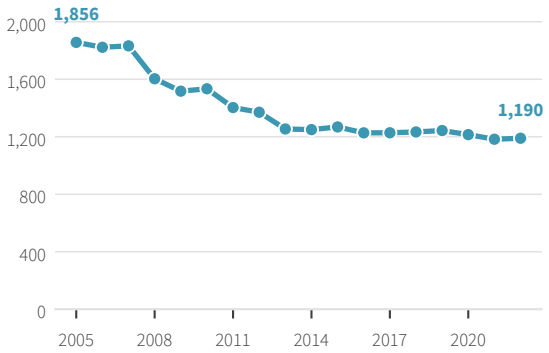
Source: EEA (interpolated PM2.5 grid), JRC (GHS-POP). Compiled by Gaindegia.

PM2.5 concentration, by territory. Basque Country, 2025 (µg/m³)



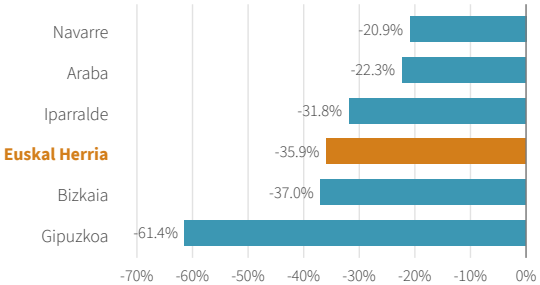
Source: EEA (interpolated PM2.5 grid), JRC (GHS-POP). Compiled by Gaindegia.

Environmental impact of anthropogenic emissions (IAI). Basque Country, 2005-2022 (thousand person equivalents)



Source: Amalur EIS, Copernicus (CAMS 8.0). Compiled by Gaindegia.

Change in IAI, by territory. Basque Country, 2005-2022 (%)



Source: Amalur EIS, Copernicus (CAMS 8.0). Compiled by Gaindegia.

[34] PM2.5: particulate matter with a diameter of less than 2.5 µm; population exposure, annual mean concentration weighted by population.

[35] IAI: each emission weighted by its environmental impact (JRC LCIA method EF 3.1), in 2010 person equivalents (WENFIp indicator).

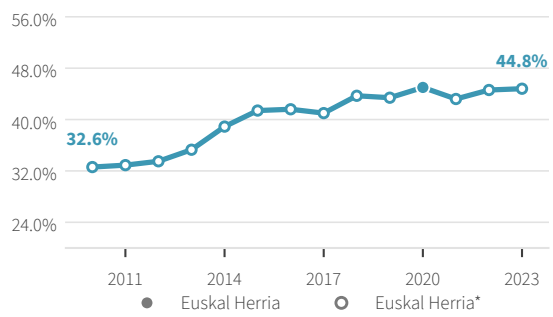
5.4
MATERIALS AND WASTE

Less waste and more separate collection, but far from the EU's 55% target

In Hego Euskal Herria, 44.8% of municipal waste is collected separately[36] (2023; 32.6% in 2010), but the rate has stagnated since 2018. Iparralde (62.4%, 2025) and Gipuzkoa (58.1%) are ahead; Bizkaia (37.1%) lags behind. Excluding rejects, the actual recycling rate is some 9 points lower, and the EU has set a target of 55% for 2025.

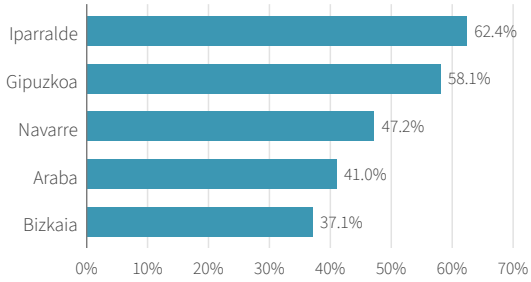
Waste generation (total) is 2.48 tonnes per inhabitant in Hego Euskal Herria (2024; 3.13 in 2016); excluding major mineral wastes, 1.35. Navarre (4.45) generates more per inhabitant than the BAC (1.88). Domestic material consumption (DMC[37]) in the BAC is 10.4 tonnes per inhabitant (2022), around half of the 2006 peak (20.1).

Recycling rate of municipal waste (separate collection). Basque Country, 2010-2023 (%)



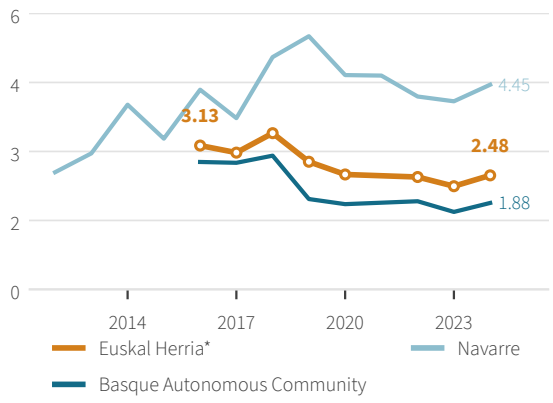
Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: Basque Government (municipal waste statistics), Bil Ta Garbi, INE. Compiled by Gaindegia.

Recycling rate of municipal waste, by territory. Basque Country, latest year (%)



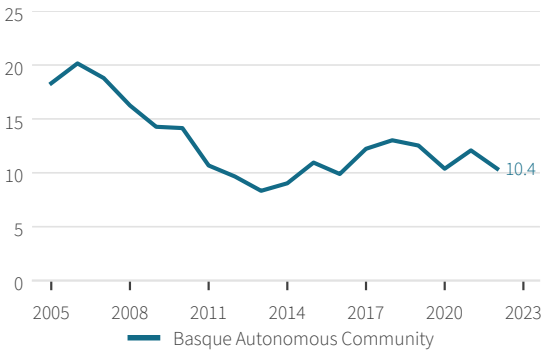
Note: Latest year: BAC territories 2024, Navarre 2023, Iparralde 2025 (Bil Ta Garbi).
Source: Basque Government, Bil Ta Garbi, INE. Compiled by Gaindegia.

Waste generation (total). Euskal Herria*, 2016-2024 (tonnes per inhabitant)



Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years.
Source: Basque Government, Environmental Observatory of Navarre. Compiled by Gaindegia.

Domestic material consumption (DMC). Basque Autonomous Community, 2005-2022 (tonnes per inhabitant)



Source: Basque Government (material flow statistics). Compiled by Gaindegia.

[36] Separate collection: municipal waste collected separately (including rejects), as a share of total municipal waste.

[37] DMC (domestic material consumption): domestic extraction plus imports minus exports, per inhabitant.

SUMMARY

Energy: greater efficiency, but higher consumption. In Hego Euskal Herria, energy intensity has fallen by 20% since 2014, but final energy consumption has grown by 17.9%; renewables account for 22.3% of final consumption, and Navarre is the driving force behind renewable capacity.

Land and nature under pressure. Artificial land grew by 10.5% in 2006-2018; 76.6% of Natura 2000 network cases are in good status, and plantations predominate in the forests of Bizkaia and Gipuzkoa.

Air quality improving. The environmental impact of anthropogenic emissions has fallen by 35.9% since 2005; PM2.5 still exceeds the WHO guideline 1.7 times over.

Waste. Hego Euskal Herria generates 2.48 tonnes of waste per inhabitant, and 44.8% of municipal waste is collected separately, far from the EU target.

Main environmental indicators

Indicator	Value	Territorial coverage (year)	Trend
Energy intensity (toe / million €)	77.7	Euskal Herria* (2024)	▼ Falling
Share of renewable energy (%)	22.3%	Euskal Herria* (2023)	▲ Rising
Installed renewable electricity capacity (W/inhabitant)	1,128	Euskal Herria* (2025)	▲ Rising
Natural forests (% of forest)	69.2%	Euskal Herria (2018-2024)	● Stable
Growth in artificial land (%)	10.5%	Euskal Herria (2006-2018)	▲ Rising (slowing down)
PM2.5 concentration (µg/m³)	8.3	Euskal Herria (2025)	▼ Falling
Recycling rate of municipal waste (%)	45.0%	Euskal Herria (2020)	● Stagnant
Domestic material consumption (t/inhabitant)	10.4	Basque Autonomous Community (2022)	▼ Falling
Natura 2000, in good status (%)	76.6%	Euskal Herria (2024)	▼ Falling
Water bodies in good ecological status (%)	54.5%	Basque Autonomous Community (2024)	▲ Improving
Environmental impact of anthropogenic emissions, IAI (thousand p.e.)	1,190	Euskal Herria (2022)	▼ Falling
Waste generation (total) (t/inhabitant)	2.48	Euskal Herria* (2024)	▼ Falling

Note: * Euskal Herria*: excluding Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no data are available for Iparralde for those years. Latest data for Euskal Herria* (excluding Iparralde): Recycling rate of municipal waste: 44.8% (2023).
Source: EUSTAT, Government of Navarre, URA, Amalur EIS, Basque Government, Bil Ta Garbi, REE, MITECO, INE, Copernicus, EEA. Compiled by Gaindegia.



DASHBOARD: OVERVIEW OF THE BASQUE COUNTRY

Demography

Indicator	Latest value	Previous value	Change
Population	**3,200,870** 2023	**3,130,249** 2017	▲ +2.3%
Crude birth rate (‰)	**6.4** 2023	**6.6** 2022	▼ -0.2
Crude death rate (‰)	**9.9** 2023	**10.9** 2022	▼ -0.9
Natural change (‰)	**-3.5** 2023	**-4.2** 2022	▲ +0.7
Net migration (‰)	**10.7*** 2024	**9.7*** 2023	▲ +1.0
Foreign-born population (%)	**32.3%** 2022	**32.2%** 2021	▲ +0.1 pp
Ageing rate (%)	**24.2%** 2023	**22.3%** 2017	▲ +1.9 pp

Economy

Indicator	Latest value	Previous value	Change
GDP per capita (PPS)	**42,332** 2023	**38,780** 2022	▲ +9.2%
Share of industry (% of value added)	**24.1%** 2023	**24.7%** 2022	▼ -0.6 pp
Average size of industrial establishments (persons employed)	**18.2** 2024	**17.6** 2023	▲ +0.6
Employment in cooperatives (% of employed persons)	**4.7%** 2023	**4.8%** 2022	● 0.0 pp
Net balance of enterprises (% of active enterprises)	**0.4%** 2023	**0.6%** 2022	▼ -0.2 pp
R&D expenditure (% of GDP)	**1.9%** 2023	**1.9%** 2022	▲ +0.1 pp
R&D personnel (% of total employment)	**2.1%** 2023	**2.0%** 2022	▲ +0.1 pp
Exports of goods (% of GDP)	**36.0%** 2023	**39.4%** 2022	▼ -3.4 pp
Labour productivity (index, 2015 = 100)	**103.7*** 2024	**103.7*** 2023	● +0.0
Hourly labour cost in manufacturing (euros)	**30.0*** 2024	**29.0*** 2023	▲ +3.3%
Labour share of value added (%)	**61.0%*** 2024	**60.7%*** 2023	▲ +0.3 pp
Compensation per employee (euros)	**46,813** 2024	**45,171** 2023	▲ +3.6%
Public debt (% of GDP)	**14.1%** 2023	**15.7%** 2022	▼ -1.6 pp

Society

Indicator	Latest value	Previous value	Change
Employment rate, 15-64 (%)	**70.6%** 2023	**66.6%** 2017	▲ +4.0 pp
Tertiary education, 25-64 (%)	**53.4%** 2023	–	–
Disposable household income per capita (PPS)	**20,880** 2021	**19,388** 2020	▲ +7.7%
Annual change in consumer prices (%)	**2.9%*** 2025	**3.0%*** 2024	▼ -0.1 pp
At risk of poverty or social exclusion, AROPE (%)	**15.1%*** 2025	**15.6%*** 2024	▼ -0.5 pp
Gini coefficient (0-100)	**32.2** 2021	**32.3** 2020	▼ -0.1
Social protection expenditure (% of GDP)	**23.5%*** 2019	**23.0%*** 2018	▲ +0.5 pp
Gender Equality Index (0-100)	**66.4*** 2020	**73.2*** 2019	▼ -6.8
Life satisfaction (0-10)	**7.42*** 2024	**7.38*** 2022	▲ +0.04

Culture and languages

Indicator	Latest value	Previous value	Change
Knowledge of Basque: Basque speakers aged over 5 (%)	**36.1%*** 2021	–	–
Use of Basque with work colleagues (%)	**30.9%** 2021	**17.5%** 1991	▲ +13.4 pp
Use of Basque on the street (% of conversations)	**12.6%** 2021	**12.6%** 2016	● 0.0 pp
Cultural employment (thousand persons)	**45*** 2025	**48*** 2024	▼ -6.3%

Environment

Indicator	Latest value	Previous value	Change
Energy intensity (toe per million euros of GDP)	**77.7*** 2024	**77.9*** 2023	▼ -0.2
Share of renewable energy (%)	**22.3%*** 2023	**20.3%*** 2022	▲ +2.0 pp
Installed renewable electricity capacity (watts per inhabitant)	**1,128*** 2025	**1,000*** 2024	▲ +12.8%
Artificial land (% of area)	**4.0%** 2018	**3.9%** 2012	● +0.0 pp
Natura 2000: good conservation status (%)	**76.6%** 2024	**76.5%** 2023	▲ +0.1 pp
Water bodies in good ecological status (%)	**54.5%** (BAC) 2024	**48.5%** (BAC) 2023	▲ +6.0 pp
PM2.5 concentration (µg/m^3)	**8.3** 2025	**8.1** 2024	▲ +0.2
Environmental impact of anthropogenic emissions (person equivalents per inhabitant)	**0.38*** 2022	**0.38*** 2021	● +0.00
Waste generation (tonnes per inhabitant)	**2.48*** 2024	**2.24*** 2023	▲ +0.24
Recycling rate of municipal waste, separate collection (%)	**45.0%** 2020	–	–
Domestic material consumption (tonnes per inhabitant)	**10.4** (BAC) 2022	**12.1** (BAC) 2021	▼ -1.7

Note: Latest value and previous available value in the series (year in grey). Change: for percentages, difference in percentage points (pp); for rates and indices, difference; for quantities and monetary values, relative change (%). The arrow indicates direction, not an assessment. * Euskal Herria*: excluding Iparralde. BAC: Basque Autonomous Community. Latest data for Euskal Herria* (excluding Iparralde): Population: 2,904,223 (2025); Crude birth rate: 6.1 (2024); Crude death rate: 9.8 (2024); Natural change: -3.8 (2024); Foreign-born population: 31.3% (2025); Ageing rate: 24.6% (2025); Average size of industrial establishments: 19.1 (2025); Public debt: 13.7% (2025); Employment rate, 15-64: 71.9% (2025); Tertiary education, 25-64: 56.4% (2025); Disposable household income per capita: 26,078 (2023); Gini coefficient: 29.6 (2023); Recycling rate of municipal waste, separate collection: 44.8% (2023).

II

THE BASQUE COUNTRY IN EUROPE





1 DEMOGRAPHY

One of the oldest populations in Europe: in the share of people aged over 65, the Basque Country ranks second among countries, for both women and men

The crude birth rate is among the lowest in Europe, and migration sustains the population. Euskal Herria compared with the countries and regions of Europe.

27.1%

women aged over 65, Euskal Herria* (2025): the 3rd highest percentage among 38 countries

22%

men aged over 65, Euskal Herria* (2025): the 3rd highest percentage among 38 countries

6.1‰

crude birth rate, Euskal Herria* (2024): among 40 countries, only Monaco's is lower

10.7‰

net migration, Euskal Herria* (2024): the 9th highest among 40 countries

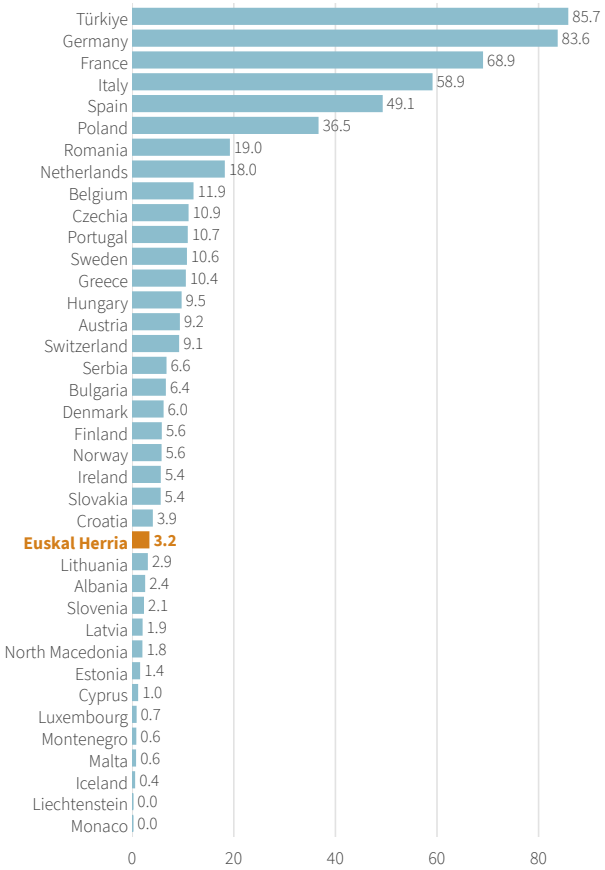
1.1 POPULATION

In terms of size, the Basque Country is on a par with Europe's medium-sized and small countries, between Croatia and Lithuania, and in the middle of the list of European regions.

In 2025, Hego Euskal Herria had 2,904,223 inhabitants; Euskal Herria as a whole, 3,200,870 in 2023, the latest available figure. Ranked as a country, it would be 25th out of 38 countries, between Croatia (3.9 million) and Lithuania (2.9 million), and the Basque Country as a whole would also hold the same place (25th). It is larger than Slovenia, Latvia, Estonia, Cyprus, Luxembourg, Malta or Iceland.

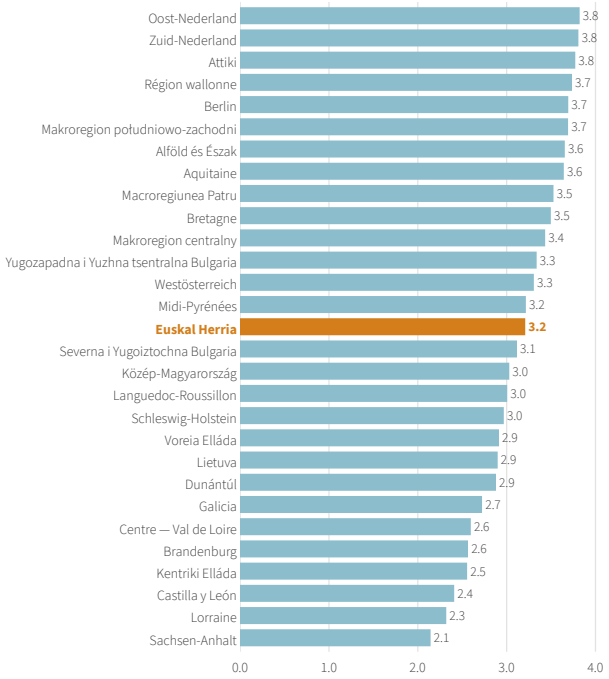
Among the regions, Hego Euskal Herria ranks 61st out of 110 regions and Euskal Herria as a whole 55th (2023). Regions of similar size include Schleswig-Holstein, Northern Greece and Lithuania, among others: the Basque Country is the size of a medium-sized European region.

Population, European countries and Euskal Herria (million inhabitants, 2025)



Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 2,904,223 (2025).
Source: EUSTAT, INE (Municipal Register), INSEE, Eurostat. Compiled by Gaindegia.

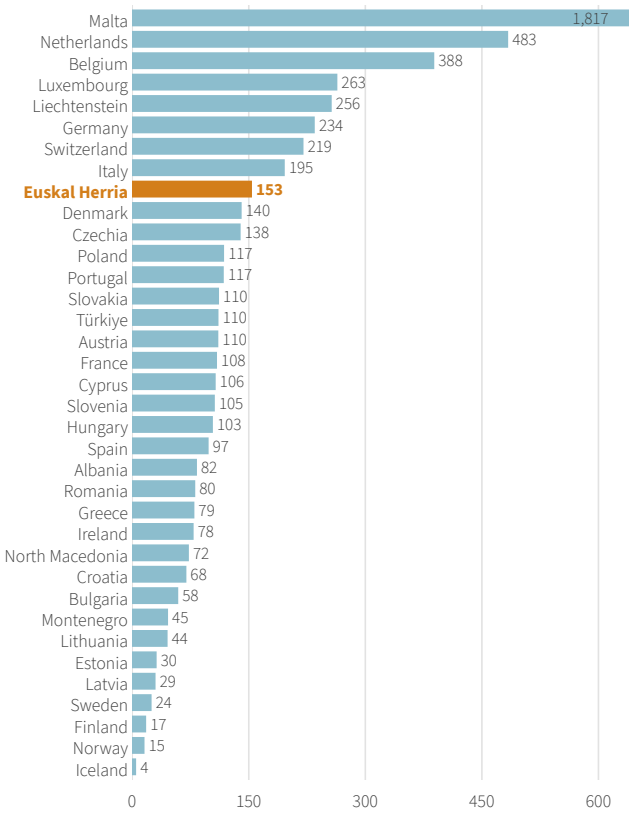
Population, European regions of similar size to Euskal Herria (million inhabitants, 2025)



Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 2,904,223 (2025).
Source: EUSTAT, INE (Municipal Register), INSEE, Eurostat. Compiled by Gaindegia.

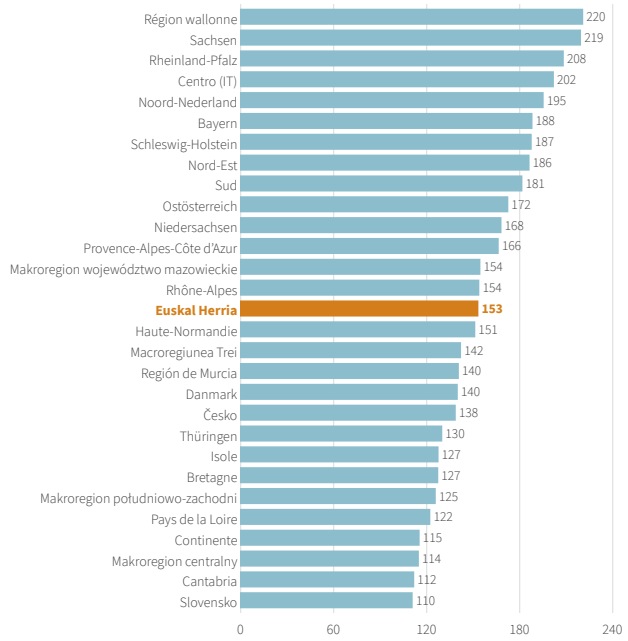
In terms of density, Hego Euskal Herria had 161.8 inhabitants per km² in 2025, and the Basque Country as a whole 152.9 in 2023. This is the 9th highest density among 36 countries, behind Italy (195.1) and ahead of Denmark (139.6). Malta (1,817.2), the Netherlands (482.6) and Belgium (387.5) are the most densely populated. Among the regions, it ranks 41st out of 110: most of its neighbouring regions have a lower density, such as Cantabria (111.5), Aquitaine (87), Midi-Pyrénées (70.3), La Rioja (64.8) and Aragón (28.6).

Population density, European countries and Euskal Herria (inhabitants/km², 2025)



Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 161.8 (2025). The bar for Malta extends beyond the axis (1,817.2).
Source: EUSTAT, INE (Municipal Register), INSEE, Eurostat. Compiled by Gaindegia.

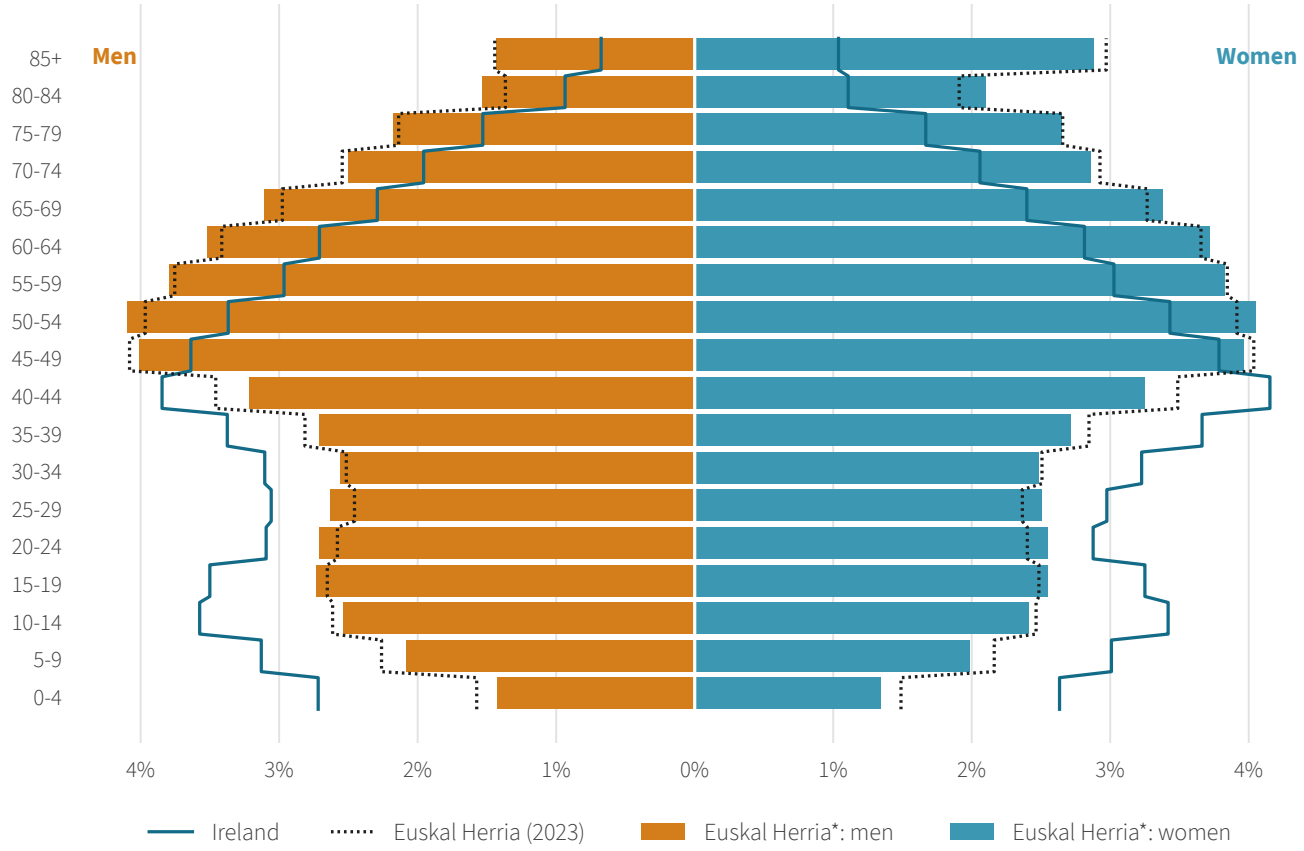
Population density, regions of similar density and Euskal Herria (inhabitants/km², 2025)



Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 161.8 (2025).
Source: EUSTAT, INE (Municipal Register), INSEE, Eurostat. Compiled by Gaindegia.

The age pyramid reflects an ageing population: the base is narrow and the 45-64 age groups are the largest. Compared with one of the youngest countries in the European Union (Ireland), the Basque Country has fewer children and young people, and more older people. The pyramid for Euskal Herria as a whole (2023) is almost identical to that of Hego Euskal Herria.

Age pyramid: the Basque Country and Ireland (% of the population, by sex and age, 2025)



Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 2,904,223 (2025). Ireland has been chosen as a reference because it is one of the countries with the youngest population in the European Union (the lowest proportion of women aged over 65): it shows the contrast with the pyramid of the Basque Country. Percentages of the total population of each territory.
Source: EUSTAT, INE (Municipal Register), INSEE, Eurostat. Compiled by Gaindegia.



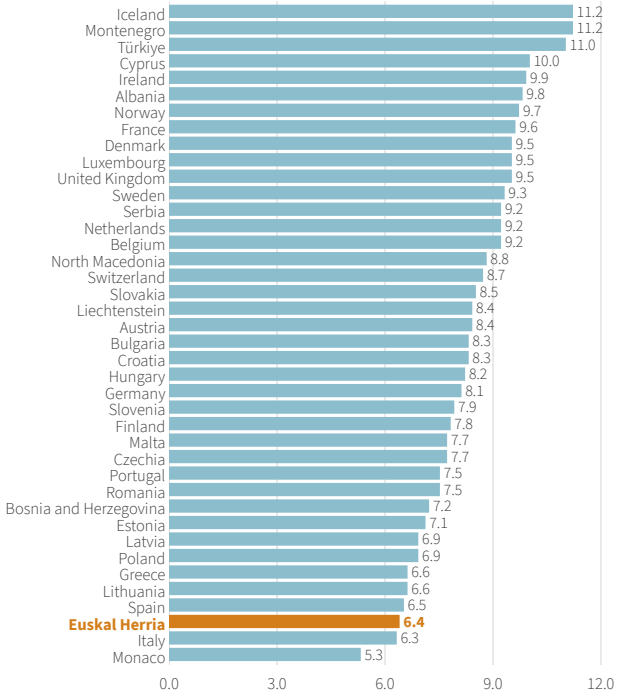
1.2
BIRTHS AND DEATHS

The crude birth rate of Euskal Herria is among the lowest in Europe, among both countries and regions.

In 2024, there were 6.1 births per thousand inhabitants in Hego Euskal Herria, and 6.4‰ in the Basque Country as a whole in 2023. It ranks 39th out of 40 countries: Italy (6.3‰) and Spain (6.5‰) are the closest, and only Monaco is lower. Among the regions, it ranks 101st out of 110.

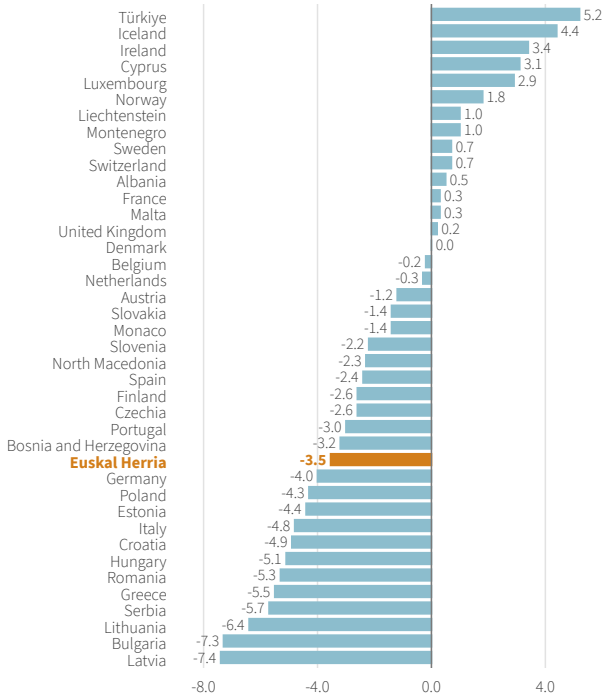
The crude death rate (9.8‰ in Hego Euskal Herria), by contrast, is in the middle of the European range (21st out of 40 countries), despite the ageing population. Taken together, natural change is negative (-3.8‰): it ranks 28th among 40 countries, between Portugal (-3‰) and Germany (-4‰). Latvia, Bulgaria and Lithuania have a more negative balance; Türkiye, Iceland and Ireland have the highest growth.

Crude birth rate, European countries and Euskal Herria (per 1,000 inhabitants, 2024)



Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 6.1 (2024).
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

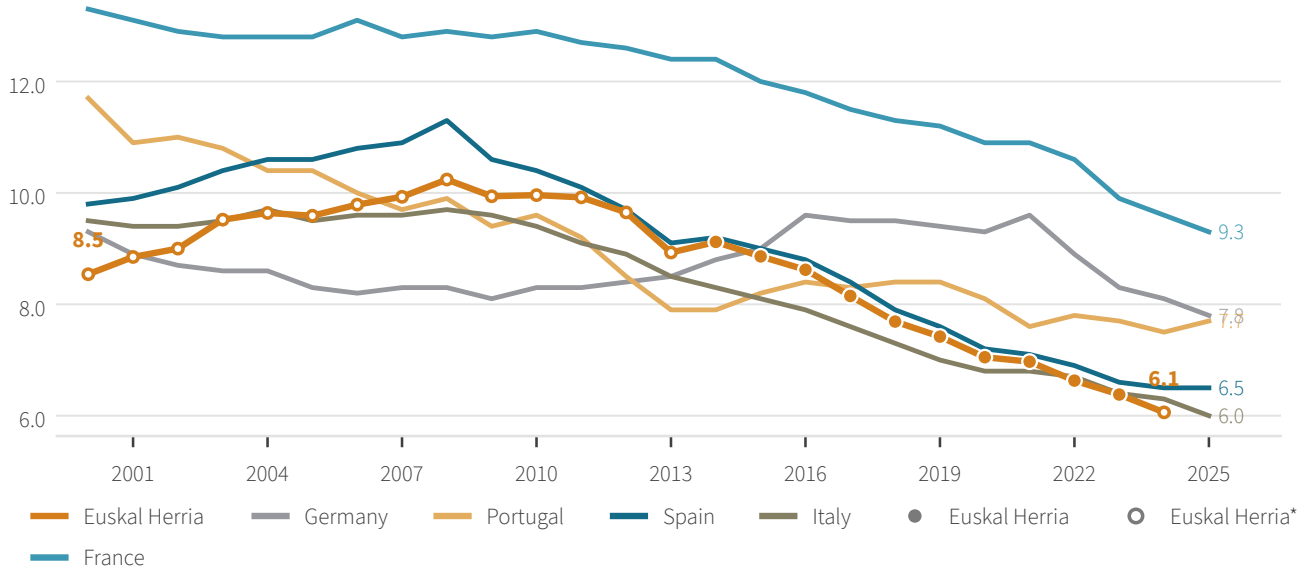
Natural change, European countries and Euskal Herria (per 1,000 inhabitants, 2024)



Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): -3.8 (2024).
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

The decline has been rapid. The crude birth rate of Hego Euskal Herria was 10.2‰ in 2008, and 6.1‰ in 2024; for Euskal Herria as a whole, it was 9.1‰ in 2014 and 6.4‰ in 2023. All the countries in the chart have declined in recent years, most of them from higher levels.

Crude birth rate over time, the Basque Country and selected countries (per 1,000 inhabitants, 2000-2025)



Note: * Euskal Herria*: Iparralde is not included in this indicator.
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

European regions with the lowest crude birth rates, and the Basque Country (per 1,000 inhabitants, 2024)

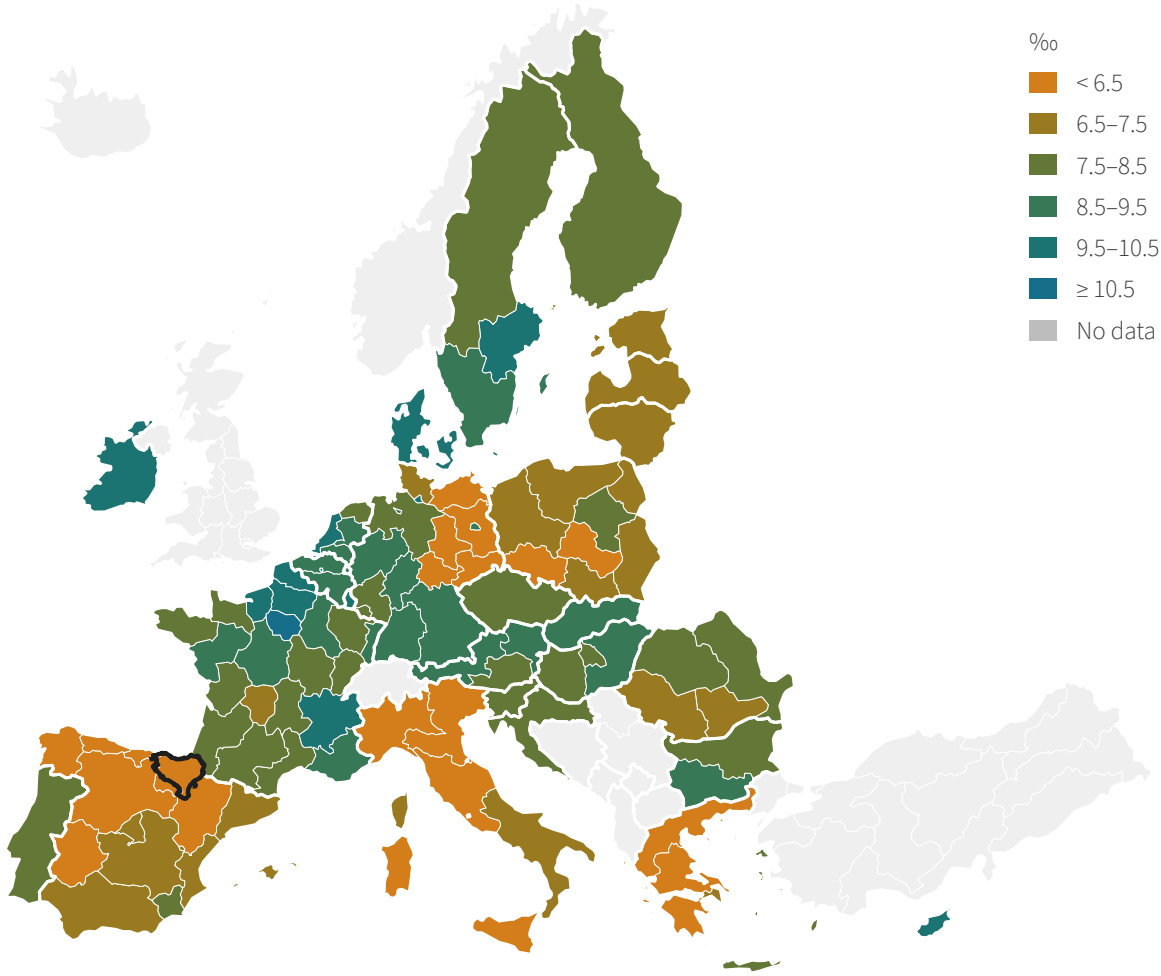
Region	Country	Crude birth rate (per 1,000 inhabitants)
Principado de Asturias	Spain	4.5
Galicia	Spain	4.9
Cantabria	Spain	5.1
Castilla y León	Spain	5.2
Thüringen	Germany	5.6
Mecklenburg-Vorpommern	Germany	5.8
Centro (IT)	Italy	5.8
Brandenburg	Germany	5.9
Sachsen-Anhalt	Germany	5.9
Sachsen	Germany	6.1
Extremadura	Spain	6.2
Voreia Elláda	Greece	6.2
Nord-Ovest	Italy	6.2
Makroregion centralny	Poland	6.2
Euskal Herria	–	**6.4**

Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 6.1 (2024).
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

Out of 40 European countries, only one has a lower crude birth rate than the Basque Country (2023)

The regional map shows the low birth rate zone: northern and western Spain, Italy, eastern Germany and northern Greece. Euskal Herria lies on the edge of that zone. The neighbouring regions to the north, Aquitaine (8‰) and Midi-Pyrénées (8.2‰), have markedly higher rates; to the south, La Rioja (6.3‰) and Aragón (6.3‰) are on a par with Hego Euskal Herria, and Cantabria (5.1‰) and Asturias (4.5‰) are below it.

Crude birth rate, European regions (per 1,000 inhabitants, 2024)



Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

The Basque Country and neighbouring regions: main demographic indicators (rates per 1,000 inhabitants; 65+, %; latest data)

Region	Crude birth rate	Crude death rate	Natural change	Net migration	Women 65+	Men 65+
Midi-Pyrénées	8.2	9.9	-1.7	7.5	25.3%	21.1%
Aquitaine	8.0	10.4	-2.4	9.5	26.7%	22.2%
Euskal Herria	**6.4**	**9.9**	**-3.5**	**–**	**26.7%**	**21.5%**
La Rioja	6.3	10.2	-3.9	11.9	24.5%	20.4%
Aragón	6.3	10.3	-3.9	13.5	25.1%	20.1%
Castilla y León	5.2	11.9	-6.7	10.7	29.5%	24.9%
Cantabria	5.1	10.3	-5.2	9.9	26.9%	22.0%
Euskal Herria*	**–**	**–**	**–**	**10.7**	**–**	**–**

Note: Births, deaths, natural change and migration: 2024; 65+: 2025. * Euskal Herria*: Iparralde is not taken into account in these indicators. Euskal Herria: data for 2023 (excluding migration).
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

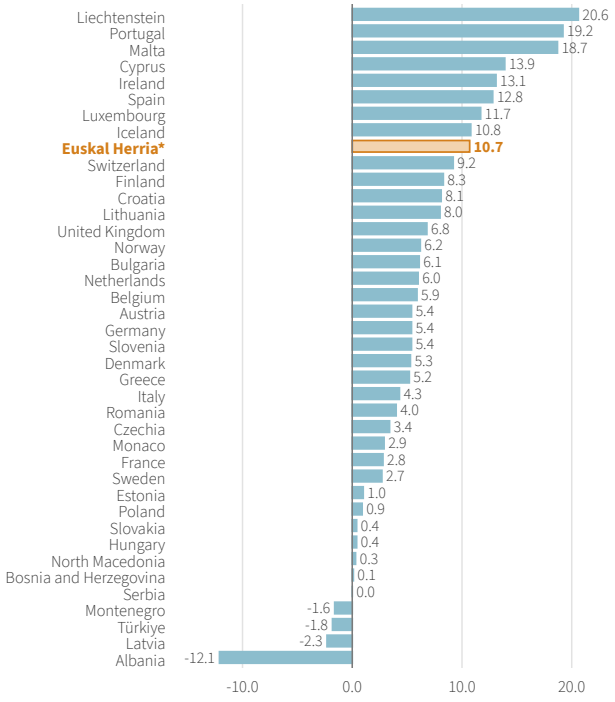
1.3
MIGRATION AND PLACE OF BIRTH

Net migration sustains the population of the Basque Country, and its rate is among the highest in Europe.

In 2024, net migration in Hego Euskal Herria was 10.7‰. It would rank 9th among 40 countries; Liechtenstein, Portugal (19.2‰) and Malta (18.7‰) have the highest balance, while Italy (4.3‰) and Germany (5.4‰) are below Hego Euskal Herria. Among the regions, it ranks 17th out of 110; among its neighbouring regions, Aquitaine recorded 9.5‰, La Rioja 11.9‰ and Cantabria 9.9‰.

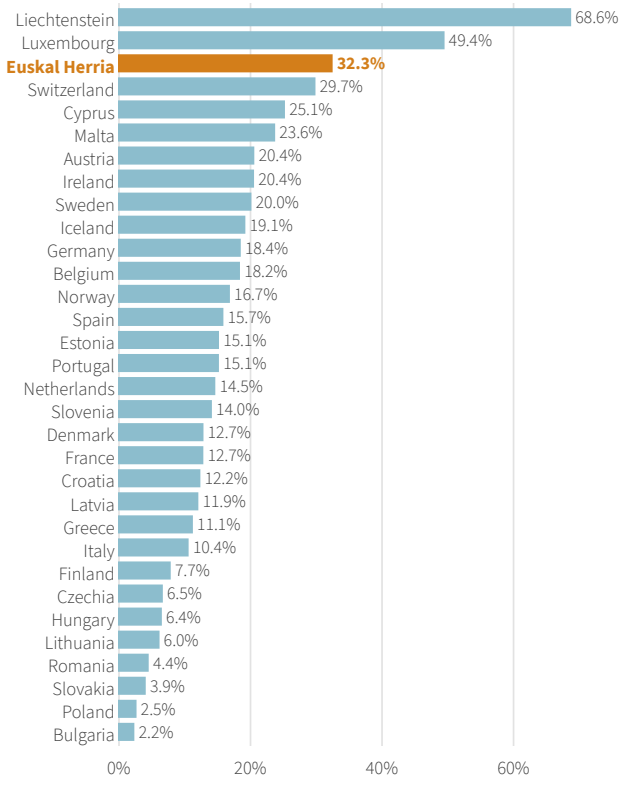
People born outside the territory account for 32.3% of the population of the Basque Country (2022), counting everyone born outside Euskal Herria: the 3rd highest percentage among 32 territories, behind Liechtenstein (68.6%) and Luxembourg (49.4%) and ahead of Switzerland (29.7%) and Cyprus (25.1%). Eastern European countries have much lower percentages. In Hego Euskal Herria, the proportion was 29.2% in 2012 and 31.3% in 2025.

Net migration, European countries and Euskal Herria* (per 1,000 inhabitants, 2024)



Note: * Euskal Herria*: Iparralde is not included in this indicator (2024). There are no annual data for Euskal Herria as a whole.
Source: INE (Migration Statistics), Eurostat. Compiled by Gaindegia.

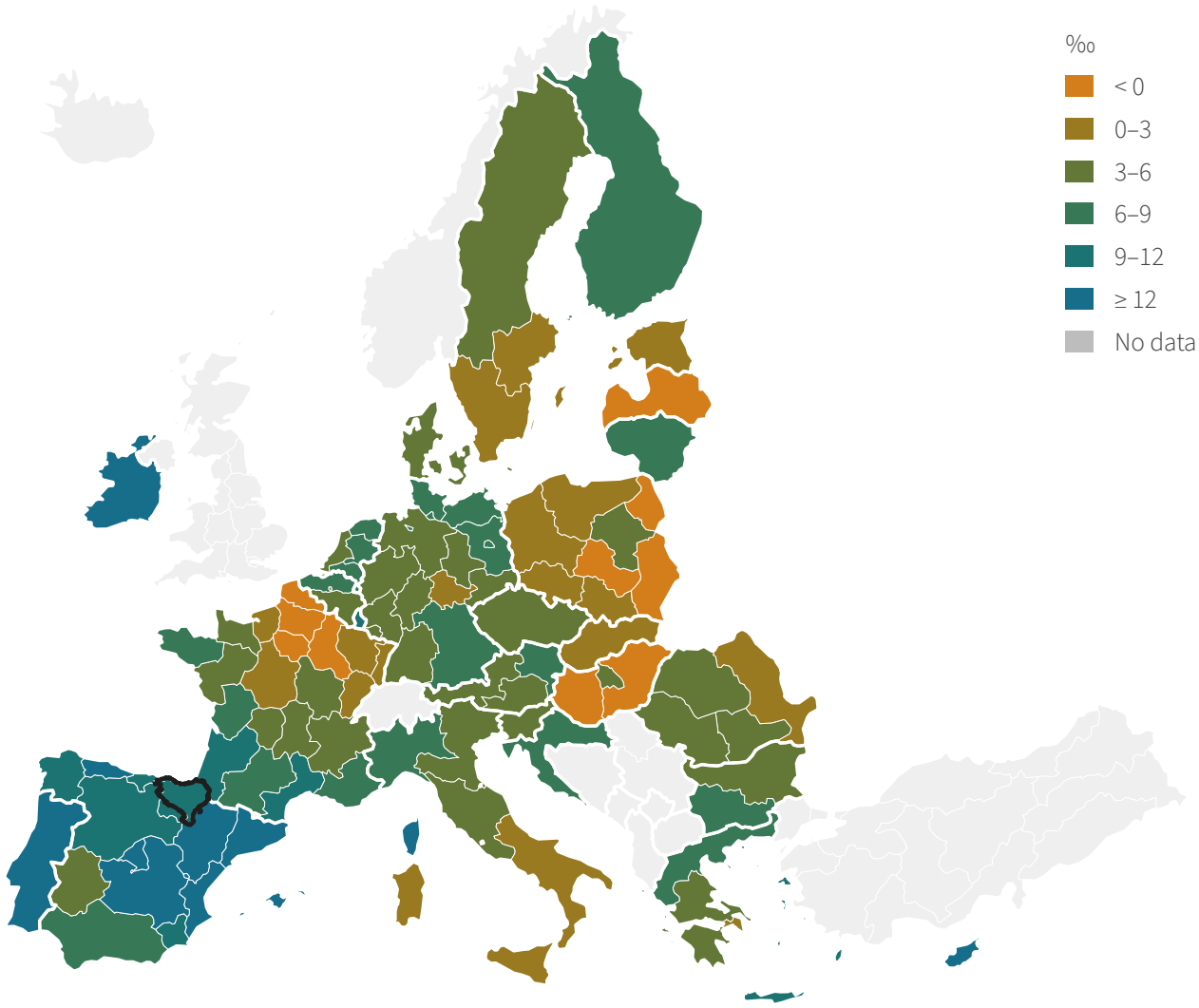
Population born outside the territory, European countries and the Basque Country (%, 2022)



Note: Countries: people born outside the country of residence. Euskal Herria: people born outside the Basque Country (including people born in other territories of Spain and France), the same figure as in Part I.
Source: INE, INSEE, Eurostat. Compiled by Gaindegia.

On the regional map, the highest net migration rates are found in southern and western Europe: in the Comunitat Valenciana, Portugal, Malta and Catalonia, among others. The most negative balances are recorded in Ile-de-France, north-eastern France (Picardie, Champagne-Ardenne) and Latvia. Hego Euskal Herria (10.7‰) ranks 17th out of 110 regions, on a par with Castilla y León and Galicia, and above Aquitaine (9.5‰) and Cantabria (9.9‰).

Net migration, European regions (per 1,000 inhabitants, 2024)



Note: * Euskal Herria*: Iparralde is not included in this indicator. Regions of the European Union: 2024 data. In grey: no data; in light grey: outside the EU. With a black border: Euskal Herria.
Source: INE (Migration Statistics), Eurostat. Compiled by Gaindegia.

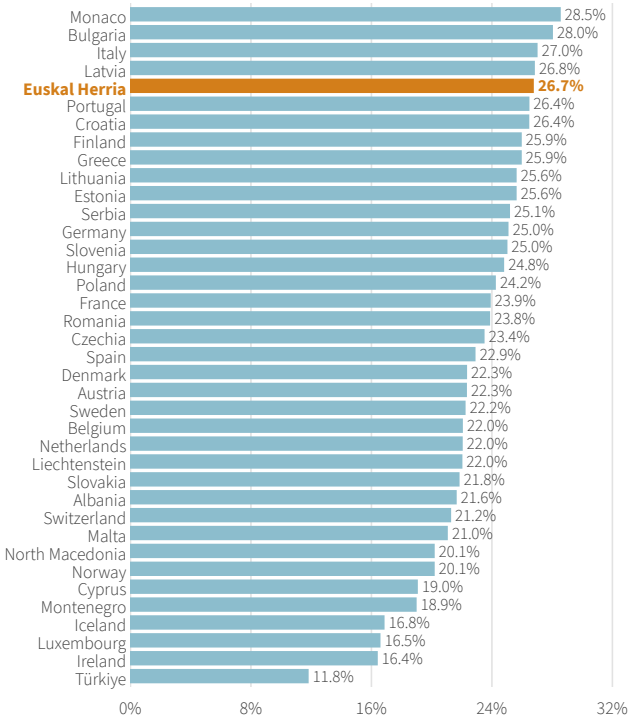
1.4
AGEING

The population of the Basque Country is among the oldest in Europe: in the share of people aged over 65, it would rank second among countries in 2023, for both women and men.

In 2025, 27.1% of women and 22% of men in Hego Euskal Herria were over 65; in Euskal Herria as a whole, 26.7% and 21.5% in 2023, the 2nd highest percentage among the countries in that year for both sexes. For women, only Monaco (28.5%) and Bulgaria (28%) have a higher percentage; Italy (27%) and Latvia (26.8%) come next. For men, it is exceeded by Monaco (26.1%) and Italy (22.3%), and Portugal (22%) is almost level.

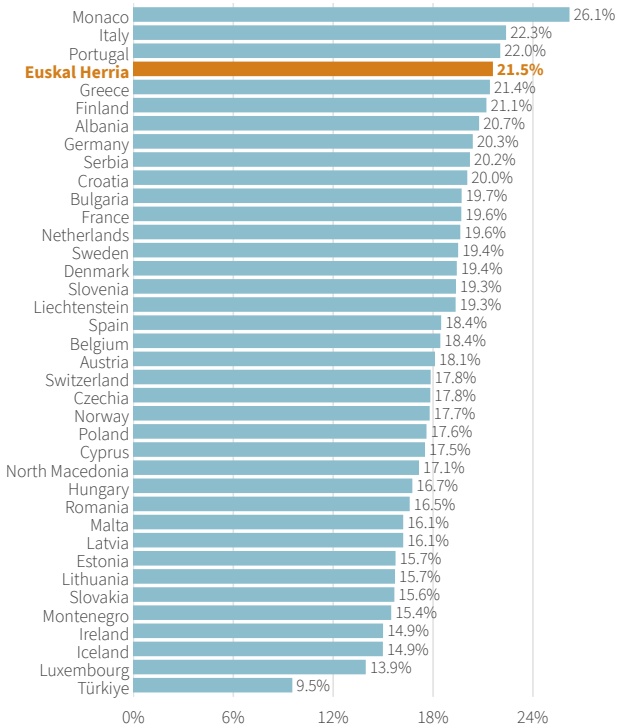
Among the regions, Hego Euskal Herria ranks 23rd for women and 28th for men (110 regions). The regions with the oldest populations are in eastern Germany (Saxony-Anhalt, Thuringia, Mecklenburg-Western Pomerania), central France (Limousin) and north-western Spain (Asturias).

Women aged over 65, European countries and Euskal Herria (% of women, 2025)



Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 27.1% (2025).
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

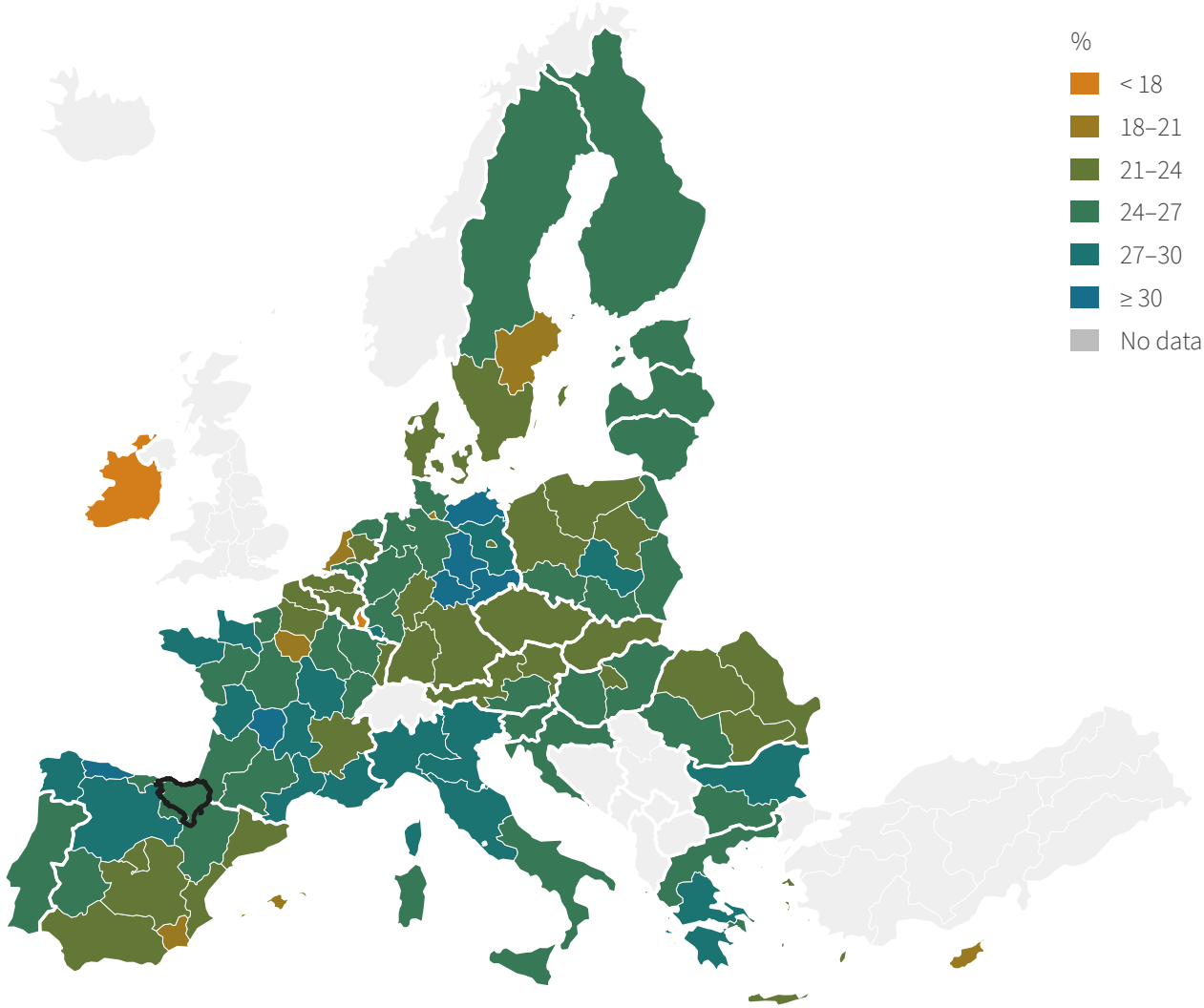
Men aged over 65, European countries and Euskal Herria (% of men, 2025)



Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 22.0% (2025).
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

The map shows the geography of ageing: eastern Germany, north-western Spain, northern Italy and central France are the oldest areas, and Melilla, Ceuta, Brussels, Ireland and Luxembourg the youngest. 27.1% of women in Hego Euskal Herria are over 65: the 23rd highest percentage among 110 regions, on a par with Brittany and Provence-Alpes-Côte d'Azur.

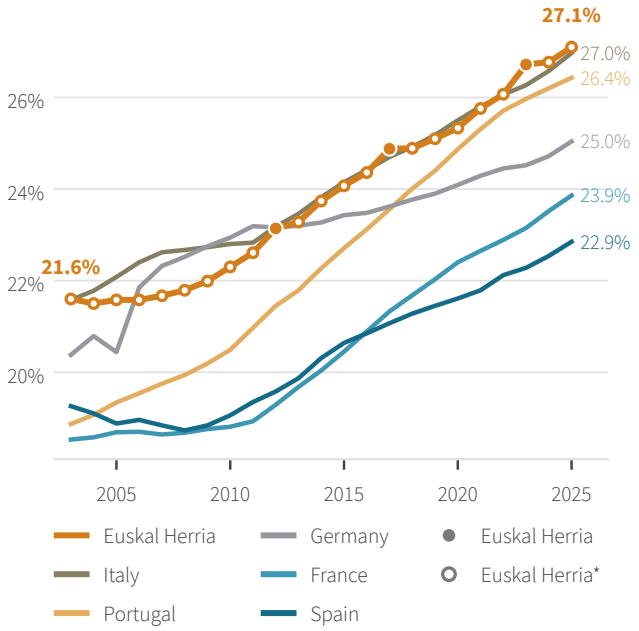
Ageing rate: women, European regions (% of women aged over 65, 2025)



Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 27.1% (2025). Regions of the European Union: 2025 data. In grey: no data; in light grey: outside the EU. With a black border: Euskal Herria.
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

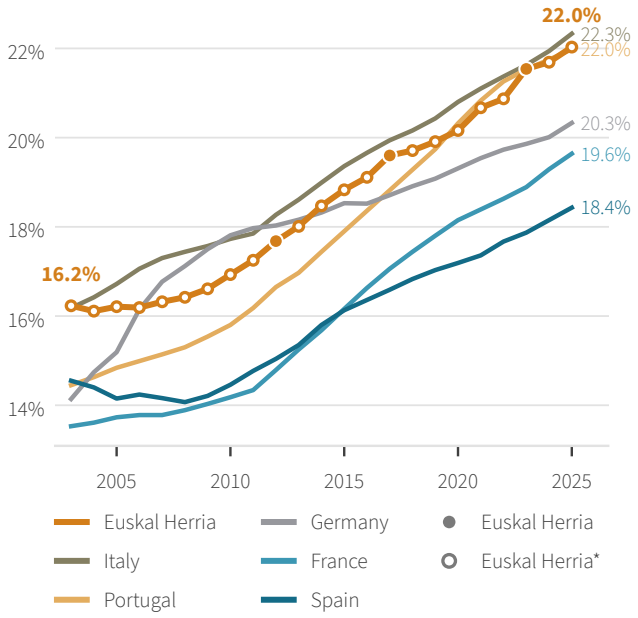
Ageing continues to increase. In the Basque Country as a whole, in 2012 23.1% of women and 17.7% of men were over 65, and 26.7% and 21.5% in 2023. In Hego Euskal Herria, the figures were 27.1% and 22% in 2025.

Ageing rate over time: women, the Basque Country and selected countries (%, 2003-2025)



Note: * Euskal Herria*: Iparralde is not included in this indicator.
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

Ageing rate over time: men, the Basque Country and selected countries (%, 2003-2025)



Note: * Euskal Herria*: Iparralde is not included in this indicator.
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

European regions with the oldest populations: women (% aged over 65, 2025)

Region	Country	65+ (%)
1. Sachsen-Anhalt	Germany	32.0%
2. Thüringen	Germany	31.3%
3. Principado de Asturias	Spain	31.2%
4. Limousin	France	31.0%
5. Mecklenburg-Vorpommern	Germany	30.9%
6. Sachsen	Germany	30.6%
7. Severna i Yugoiztochna Bulgaria	Bulgaria	29.7%
8. Poitou-Charentes	France	29.6%
9. Castilla y León	Spain	29.5%
10. Galicia	Spain	29.5%
19. Euskal Herria (2023)	–	**26.7%**

Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 27.1% (2025).
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

European regions with the oldest populations: men (% aged over 65, 2025)

Region	Country	65+ (%)
1. Limousin	France	25.9%
2. Principado de Asturias	Spain	25.2%
3. Mecklenburg-Vorpommern	Germany	25.1%
4. Poitou-Charentes	France	25.1%
5. Castilla y León	Spain	24.9%
6. Sachsen-Anhalt	Germany	24.7%
7. Thüringen	Germany	24.7%
8. Corse	France	24.3%
9. Galicia	Spain	24.1%
10. Kentriki Elláda	Greece	23.9%
26. Euskal Herria (2023)	–	**21.5%**

Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 22.0% (2025).
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

SUMMARY: DEMOGRAPHY IN EUROPE

Medium-to-small size. With 2.9 million inhabitants (2025), Hego Euskal Herria would rank 25th among 38 European countries, and 61st among 110 regions; the Basque Country as a whole had 3.2 million in 2023. In density (161.8 inhabitants/km^2), it ranks 9th among the countries.

One of the oldest populations in Europe. In Hego Euskal Herria, people aged over 65 make up 27.1% of women and 22% of men: in both cases, the 3rd highest percentage among the countries.

Few births. The crude birth rate (6.1 ‰ in Hego Euskal Herria, 2024) is the second lowest in Europe among the countries.

The contribution of migration. Natural change is negative (-3.8‰), but net migration (10.7‰ in Hego Euskal Herria, 2024) is among the highest in Europe.

Among the regions. The Basque Country shares a profile with the regions of northern Spain, Italy and eastern Germany: few births and an ageing population. The neighbouring French regions, by contrast, have higher birth rates.

Main demographic indicators: value and rank of the Basque Country in Europe

Indicator (year)	Euskal Herria	Rank among countries	Rank among regions
Population, millions (2023)	3.2	25 / 37	55 / 110
Population density, inhabitants/km^2 (2023)	152.9	9 / 36	42 / 110
Crude birth rate, per 1,000 inhabitants (2023)	6.4	39 / 40	98 / 110
Crude death rate, per 1,000 inhabitants (2023)	9.9	21 / 40	79 / 110
Natural change, per 1,000 inhabitants (2023)	-3.5	28 / 40	65 / 110
Net migration, per 1,000 inhabitants (2024)*	10.7	9 / 40	17 / 110
Ageing rate: women, % (2023)	26.7%	2 / 37	19 / 110
Ageing rate: men, % (2023)	21.5%	2 / 37	26 / 110
Population born outside the territory, % (2022)	32.3%	3 / 32	–

Note: Rank: 1 = highest value; after the slash, number of territories in the list. Rank of Euskal Herria* (excluding Iparralde) among countries, with the most recent data: Population, millions: 25 / 38 (2025); Population density, inhabitants/km^2: 9 / 36 (2025); Crude birth rate, per 1,000 inhabitants: 39 / 40 (2024); Crude death rate, per 1,000 inhabitants: 21 / 40 (2024); Natural change, per 1,000 inhabitants: 28 / 40 (2024); Ageing rate: women, %: 3 / 38 (2025); Ageing rate: men, %: 3 / 38 (2025). * Euskal Herria*: Iparralde is not included in this indicator.
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.





ECONOMY

One of the most industrial economies in Europe: in the share of manufacturing, the Basque Country ranks fifth among countries

Its level of prosperity is in the top third in Europe, it has a large research workforce and it ranks first for employment in cooperatives, compared with the countries and regions of Europe.

21.1%

share of manufacturing in value added (2023): the 5th highest among 33 countries

42,332

GDP per capita, PPS (2023): 9th among 32 countries

2.1%

R&D personnel, % of total employment, Euskal Herria (2023): the 6th highest among 34 countries

4.9%

employment in cooperatives, % of employed persons (2021): the highest percentage among the countries

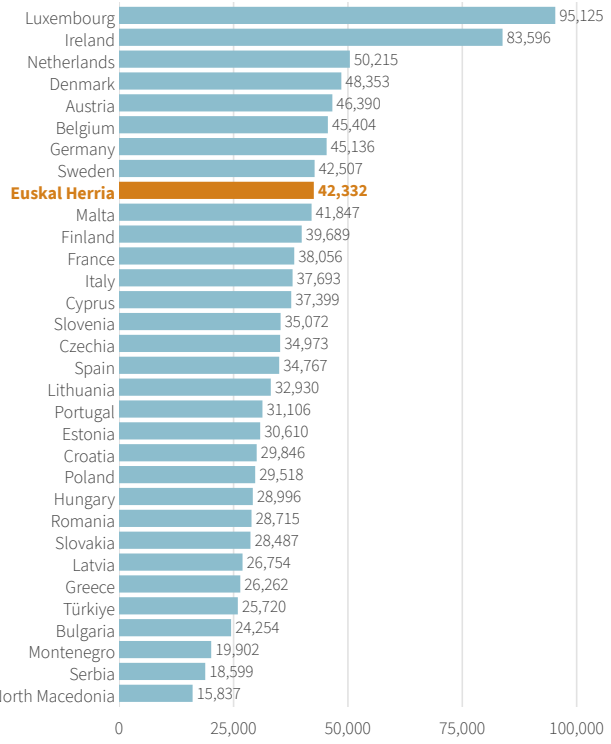
2.1 WEALTH AND PRODUCTIVE STRUCTURE

In GDP per capita, the Basque Country is in the top third in Europe, alongside Germany and Sweden. In terms of the share of industry, it is among the most industrial economies in Europe.

In 2023, GDP per capita in Euskal Herria was 42,332 PPS[7]. It would rank 9th among 32 countries, behind Germany and Sweden and ahead of Malta and Finland. Luxembourg and Ireland are by far the most prosperous. Among the regions, it ranks 27th out of 110, on a par with North Rhine-Westphalia and East Netherlands.

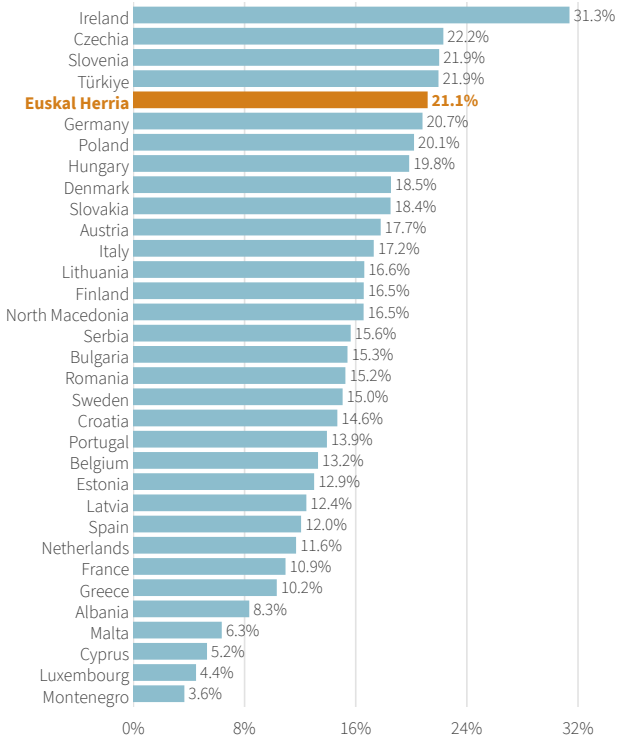
Industry generates 24.3% of value added in the Basque Country, and manufacturing alone 21.1%. Among the countries, it ranks 7th in the share of industry and 5th in that of manufacturing: only Ireland, Czechia, Slovenia and Türkiye have a larger manufacturing share, and Germany (20.7%) is behind Euskal Herria. Among the regions, it ranks 27th out of 110 in the share of industry (see map).

GDP per capita, European countries and the Basque Country (PPS, 2023)



Note: The Basque Country figure includes an estimate for Iparralde, scaled from the figure for the Pyrénées-Atlantiques départements.
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

Share of manufacturing in gross value added, European countries and the Basque Country (%, 2023)

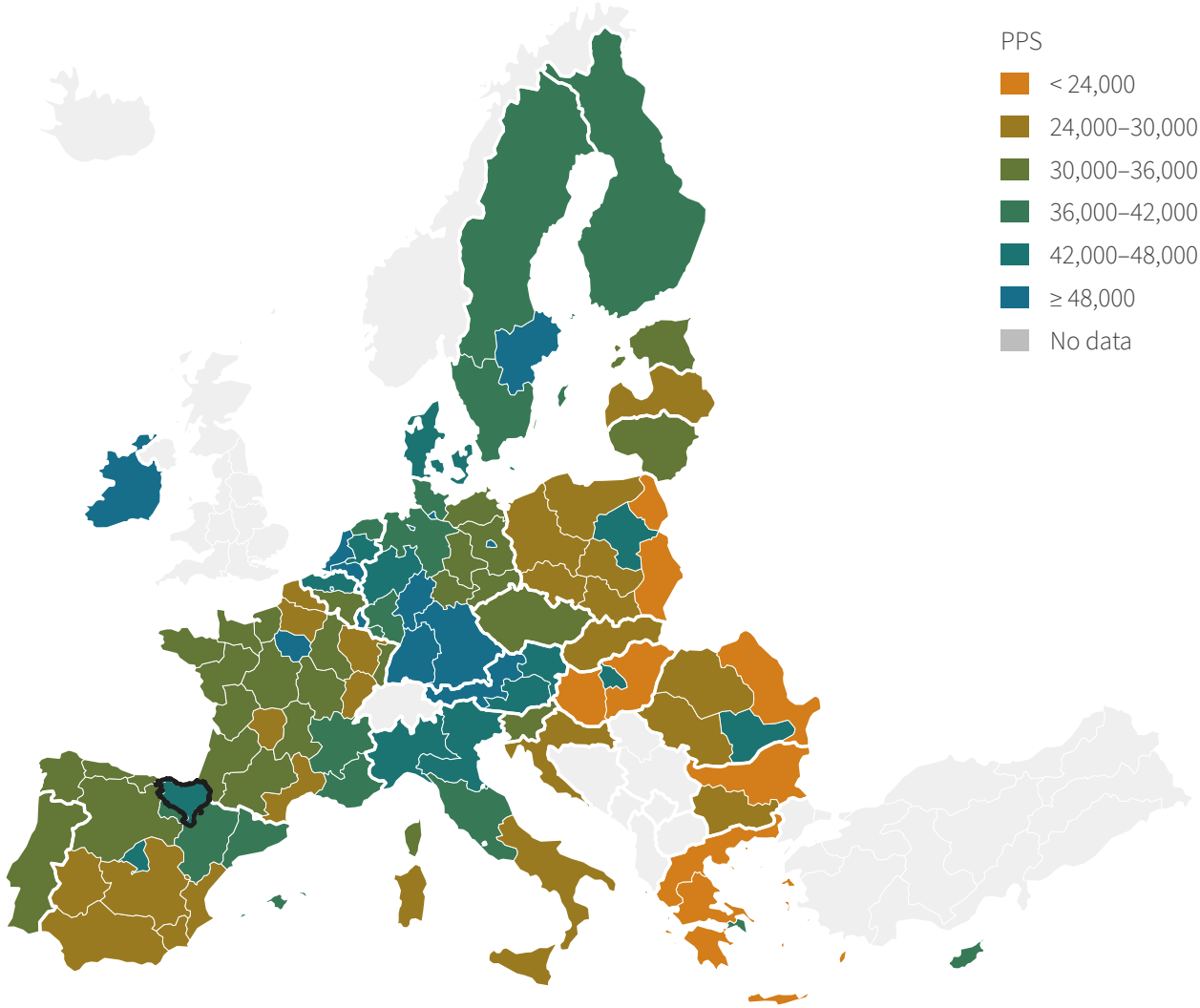


Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

[7] PPS (purchasing power standard): an artificial common currency unit that eliminates differences in price levels between countries, expressed in euros.

The GDP per capita map shows Europe's prosperous axis, from Ireland and the Netherlands to southern Germany and Austria, with the capital regions standing out (Luxembourg, Hamburg, Brussels, Ile-de-France). Greece, Bulgaria, southern Romania, eastern Hungary and Poland, and southern Italy and the islands are at the lower end. The Basque Country (42,332 PPS) ranks 27th out of 110 regions, on a par with North Rhine-Westphalia and East Netherlands, and above all its neighbouring regions: Aragón (38,996 PPS), La Rioja (36,382 PPS), Midi-Pyrénées (34,646 PPS) and Aquitaine (33,908 PPS).

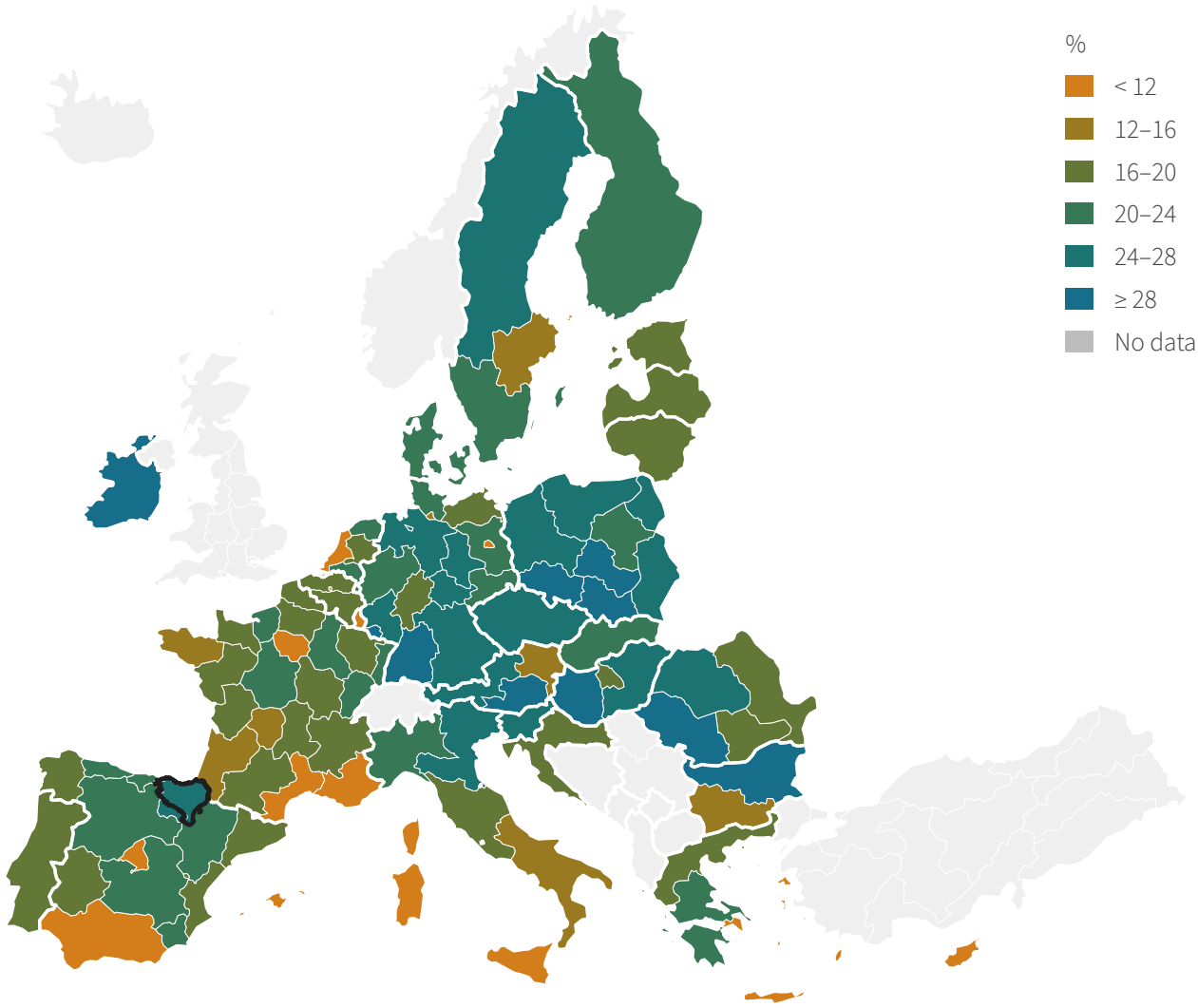
GDP per capita, European regions (PPS, 2023)



Note: Regions of the European Union: 2023 data. In grey: no data; in light grey: outside the EU. With a black border: Euskal Herria.
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

At regional level too, the Basque Country is among Europe's industrial cores: it ranks 27th out of 110 regions in the share of industry and 20th in that of manufacturing. The largest shares are found in southern Germany (Baden-Württemberg), south-western Poland, the Hungarian Danube region, Ireland and northern and south-eastern Bulgaria. In the surrounding area, Aragón (23.9%) and La Rioja (26.4%) are on a par with Euskal Herria; Aquitaine (13.5%) and Midi-Pyrénées (17.4%) have a smaller share.

Share of industry in gross value added, European regions (%, 2023)



Note: The Iparralde figure is an estimate: départemental value added by sector, scaled according to employment in Iparralde (INSEE FLORES) and weighted by productivity.
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

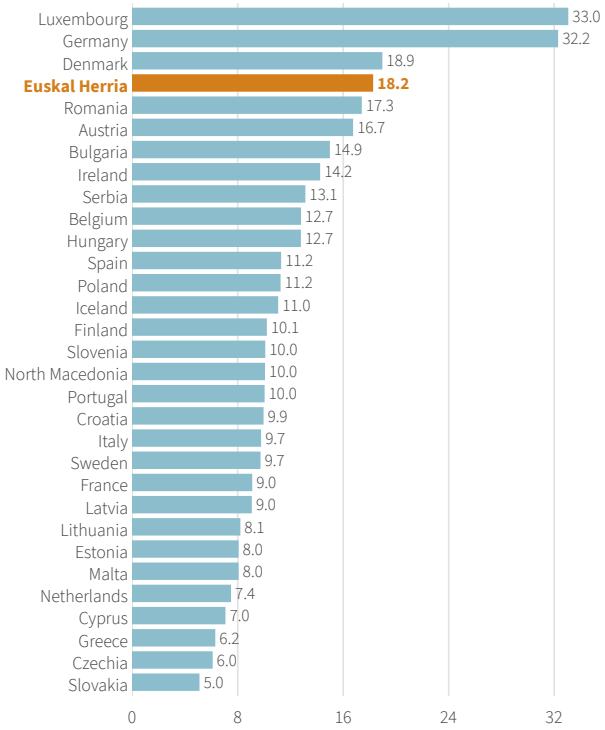
The Basque Country and neighbouring regions: wealth and industry (2023)

Region	GDP per capita (PPS)	Industry (% of GVA)	Manufacturing (% of GVA)	Wages (euros per year)
Euskal Herria	**42,332**	**24.3%**	**21.1%**	**45,171**
Aragón	38,996	23.9%	18.0%	37,980
La Rioja	36,382	26.4%	21.5%	36,347
Midi-Pyrénées	34,646	17.4%	13.7%	50,530
Aquitaine	33,908	13.5%	10.0%	48,570
Castilla y León	32,855	21.7%	16.2%	35,714
Cantabria	31,869	21.7%	17.8%	37,118

Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

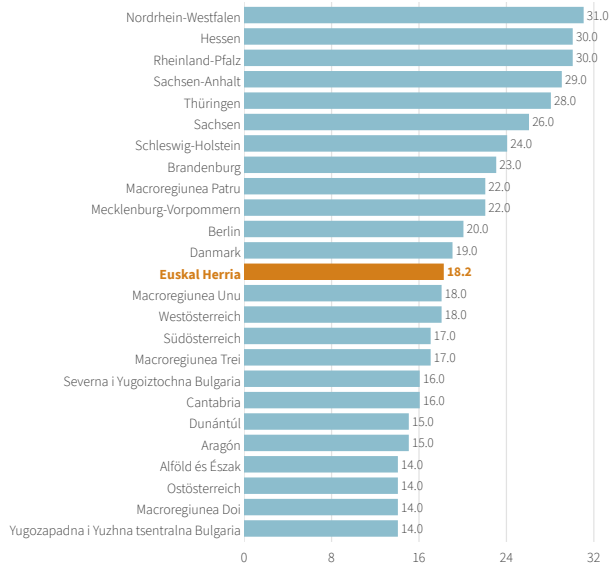
In the size of industrial establishments, too, the Basque Country is at the upper end in Europe. In 2024, each establishment had on average 18.2 persons employed: the 4th largest size among 31 countries, behind Luxembourg (33), Germany (32.2) and Denmark (18.9). Slovakia (5), Czechia (6) and Greece (6.2) have the smallest sizes. Among the regions, it ranks 20th out of 107: most German regions have a larger size, and its neighbouring regions a smaller one, such as Cantabria (16), Aragón (15), Aquitaine (7) and Midi-Pyrénées (9).

Average size of industrial establishments, European countries and the Basque Country (persons employed per establishment, 2024)



Source: EUSTAT, NASTAT, INSEE, Eurostat (structural business statistics). Compiled by Gaindegia.

Average size of industrial establishments, regions of similar size and the Basque Country (persons employed per establishment, 2024)



Source: EUSTAT, NASTAT, INSEE, Eurostat (structural business statistics). Compiled by Gaindegia.

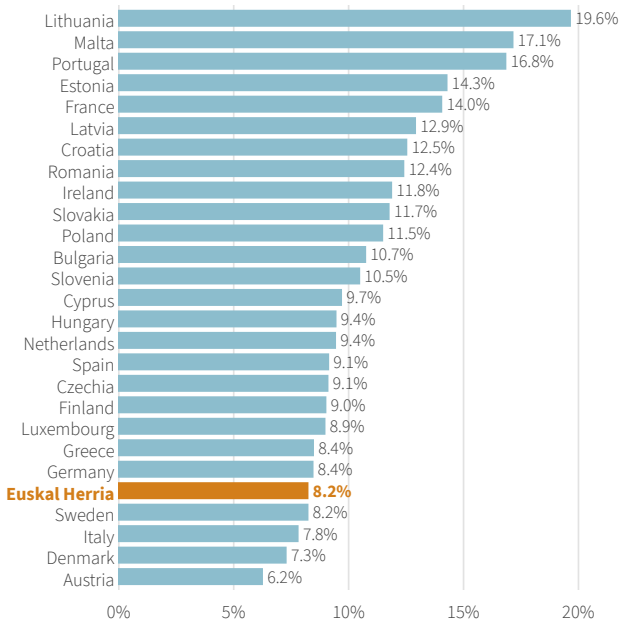
2.2
ENTERPRISES AND THE SOCIAL ECONOMY

Fewer enterprises are created in the Basque Country than in most European countries, but the weight of cooperatives is the largest in Europe.

In 2023, the enterprise birth rate in the Basque Country was 8.2% and the enterprise closure rate 7.8%; the net balance was therefore positive but small (0.4% of active enterprises). Among 27 countries it ranks 23rd in birth rate and 19th in net balance: Lithuania, Malta and Portugal have the highest birth rates. Among the regions, it ranks 78th out of 107.

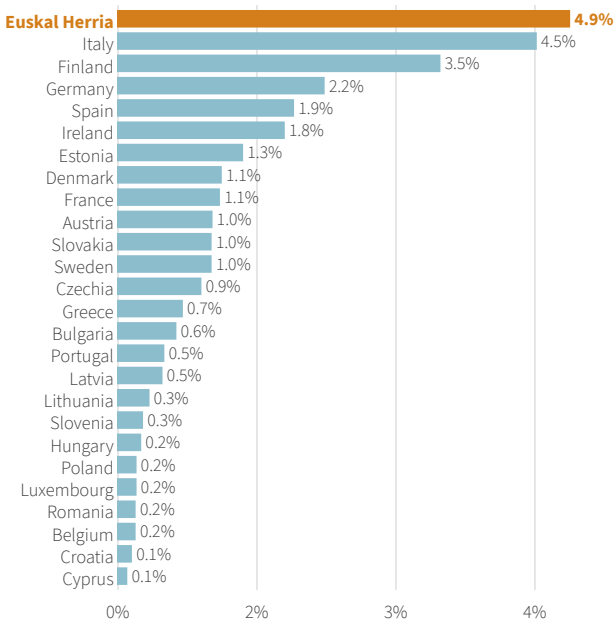
Cooperatives employ 4.9% of employed persons in the Basque Country (2021): above all European countries with data, ahead of Italy (4.5%) and Finland (3.5%).

Enterprise birth rate, European countries and the Basque Country (%, 2023)



Source: EUSTAT, INE, INSEE, Eurostat (business demography). Compiled by Gaindegia.

Employment in cooperatives, European countries and the Basque Country (% of employed persons, 2021)



Note: The reference year for the countries varies. The Basque Country figure includes a partial estimate for Iparralde: départemental cooperative employment, scaled by Iparralde's share of employment, and only the part measured by Urssaf (excluding MSA). According to Kabia (CRESS Nouvelle-Aquitaine, INSEE Flores), cooperatives in Iparralde had 1,621 employees in 2020, including agriculture.
Source: CIRIEC, Urssaf, Eurostat, Benchmarking the Socio-Economic Performance of the EU Social Economy (2024). Compiled by Gaindegia.



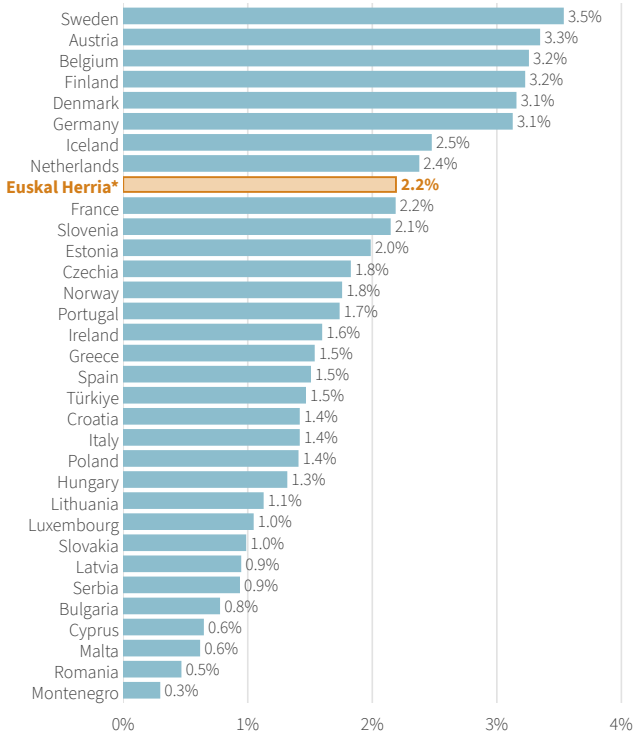
2.3
INNOVATION: RESEARCH AND DEVELOPMENT

In R&D expenditure, the Basque Country is at the upper-middle level in Europe, and in the share of personnel engaged in research, at the high level.

In 2024, R&D expenditure in Hego Euskal Herria was 2.2% of GDP. It would rank 9th among 33 countries, on a par with the Netherlands and France, and below Sweden, Austria, Belgium, Finland, Denmark and Germany (around 3% or more). Among the regions, in 2023 it ranked 31st out of 109.

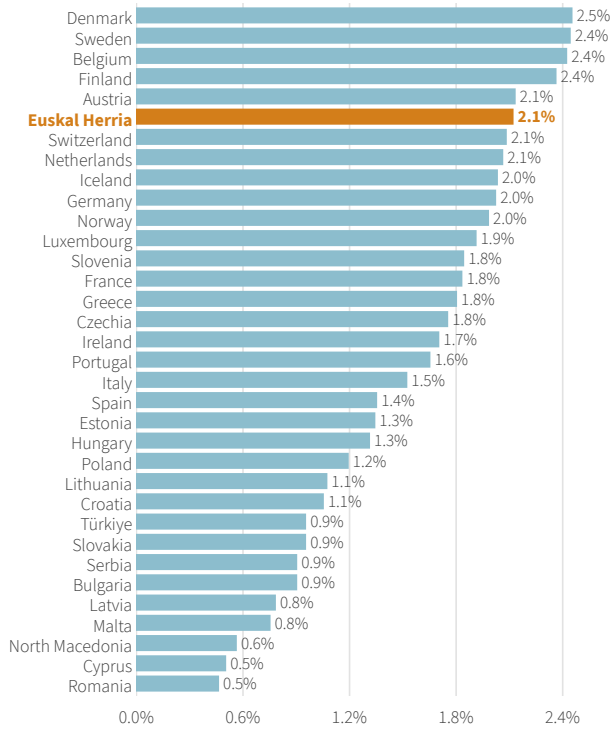
R&D personnel, for their part, accounted for 2.1% of total employment in the Basque Country in 2023: 6th among 34 countries, behind Austria and ahead of Switzerland; Denmark, Sweden and Belgium top the list. Among the regions, Euskal Herria ranks 19th out of 109 (2023). This figure should be read with caution, given the differences in measurement between sources (see note).

R&D expenditure, European countries and Euskal Herria* (% of GDP, 2024)



Note: * Euskal Herria*: Iparralde is not included in this indicator (2024).
Source: EUSTAT, INE, Eurostat. Compiled by Gaindegia.

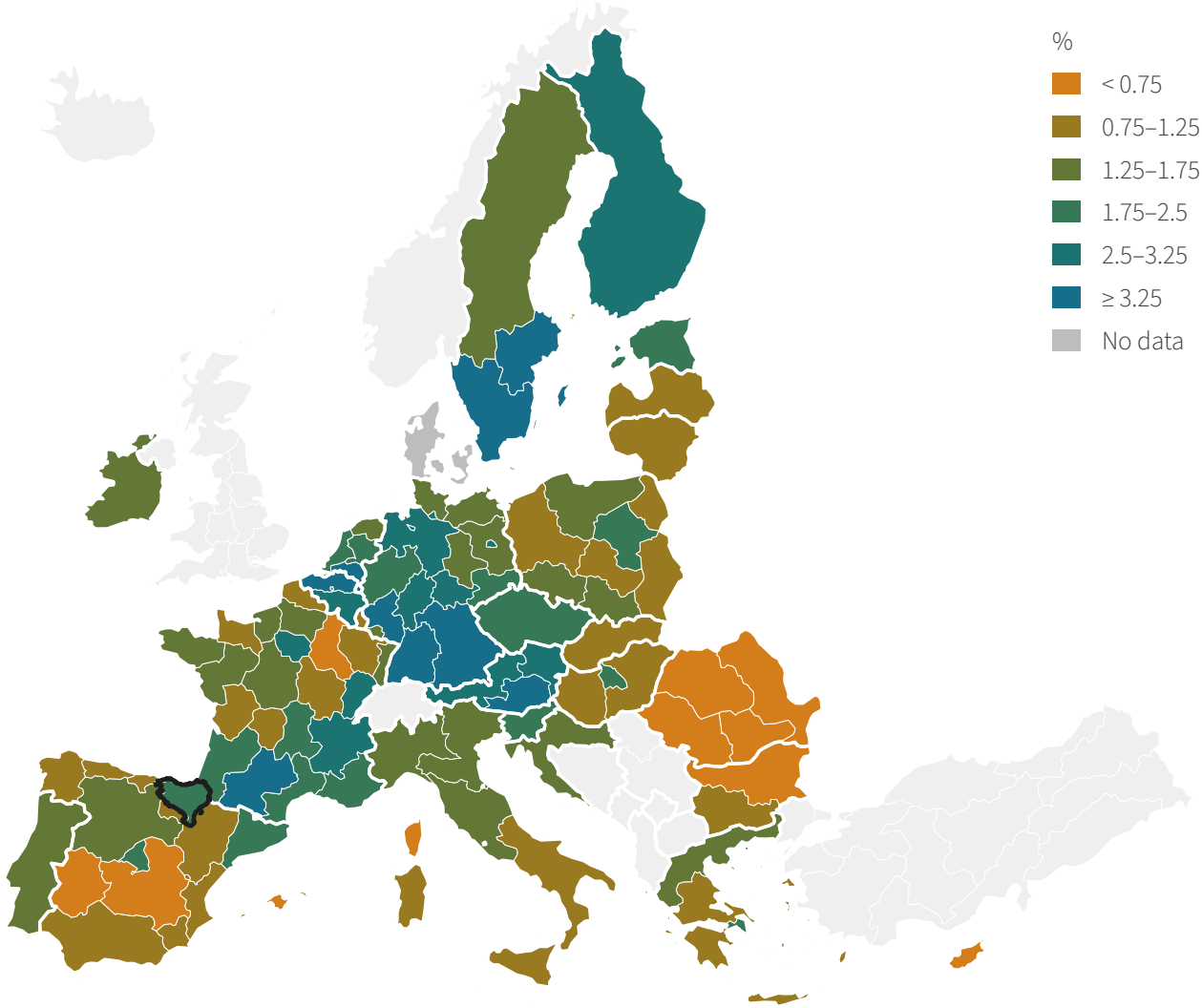
R&D personnel, European countries and the Basque Country (% of total employment, 2023)



Note: R&D personnel in full-time equivalents (FTE), as a share of total employment. The data for the Basque Country come from the R&D statistics of EUSTAT and INE, and those for the countries from Eurostat; survey coverage and measurement are not entirely the same, and the rank should be read with caution. The Euskal Herria figure includes an estimate for Iparralde: a regression model fitted on French regions, applied to employment in research activities (NACE 72) in Iparralde.
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.

R&D expenditure is concentrated in a few regions: Baden-Württemberg, southern Austria, southern Sweden and Midi-Pyrénées top the list. Hego Euskal Herria (2.1) ranks 31st out of 109 regions, on a par with Madrid and Provence-Alpes-Côte d'Azur, and well above most regions in northern Spain (Cantabria and La Rioja below 1%).

R&D expenditure, European regions (% of GDP, 2023)



Note: * Euskal Herria*: Iparralde is not included in this indicator. Regions of the European Union: 2023 data. In grey: no data; in light grey: outside the EU. With a black border: Euskal Herria.
Source: EUSTAT, INE, Eurostat. Compiled by Gaindegia.

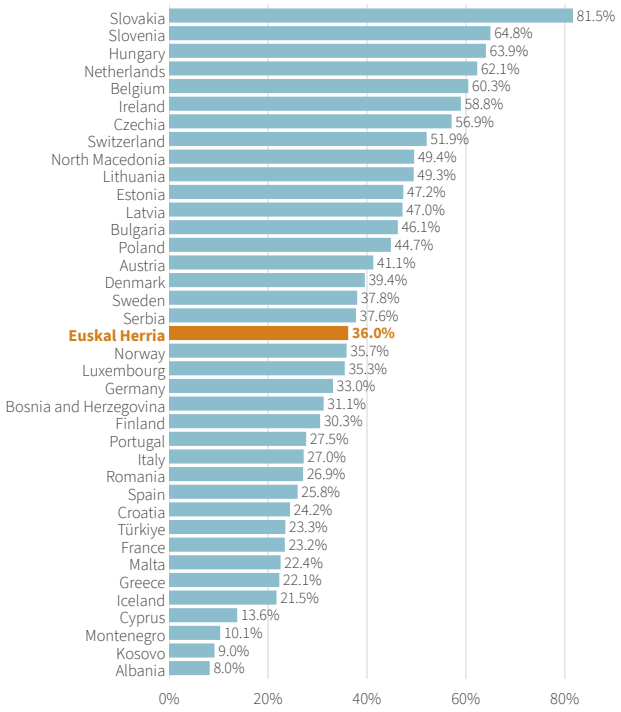
2.4
EXTERNAL TRADE

Exports of goods exceed a third of GDP in the Basque Country, in the middle of the European range, and the trade balance is among the most positive in Europe.

In 2023, exports of goods from Euskal Herria amounted to 36% of GDP. It ranks 19th among 38 countries, between Serbia and Norway. The highest export shares are found in the industrial countries of central and eastern Europe (Slovakia, Slovenia, Hungary) and in the Netherlands and Belgium, major hubs for the movement of goods.

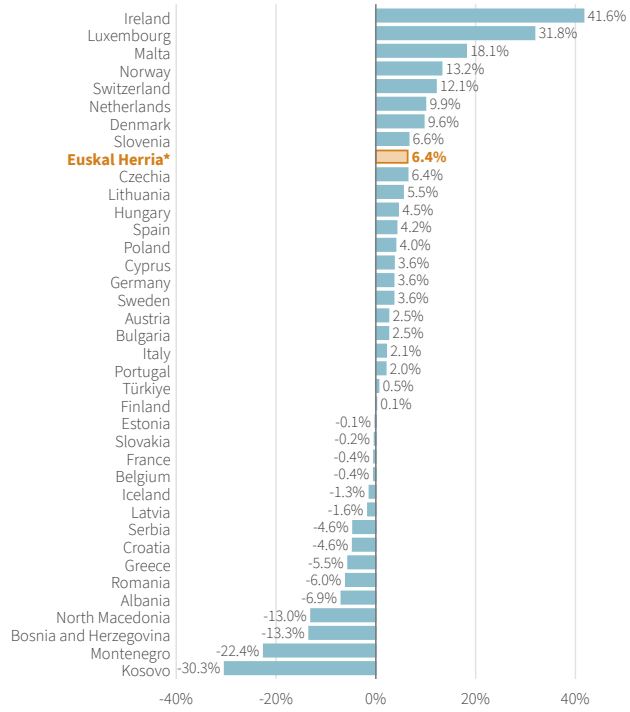
The trade balance (goods and services) is positive in Hego Euskal Herria: 6.4% of GDP in 2024. It would rank 9th among 38 countries, on a par with Slovenia and Czechia.

Exports of goods, European countries and the Basque Country (% of GDP, 2023)



Note: Euskal Herria: customs data (goods); countries: economic accounts (goods).
Source: EUSTAT, NASTAT, Douanes, Eurostat. Compiled by Gaindegia.

Trade balance (goods and services), European countries and Euskal Herria* (% of GDP, 2024)



Note: * Euskal Herria*: Iparralde is not included in this indicator (2024). Euskal Herria*: trade with other countries only (not with other territories of the Spanish and French states).
Source: EUSTAT, NASTAT (economic accounts), Eurostat. Compiled by Gaindegia.

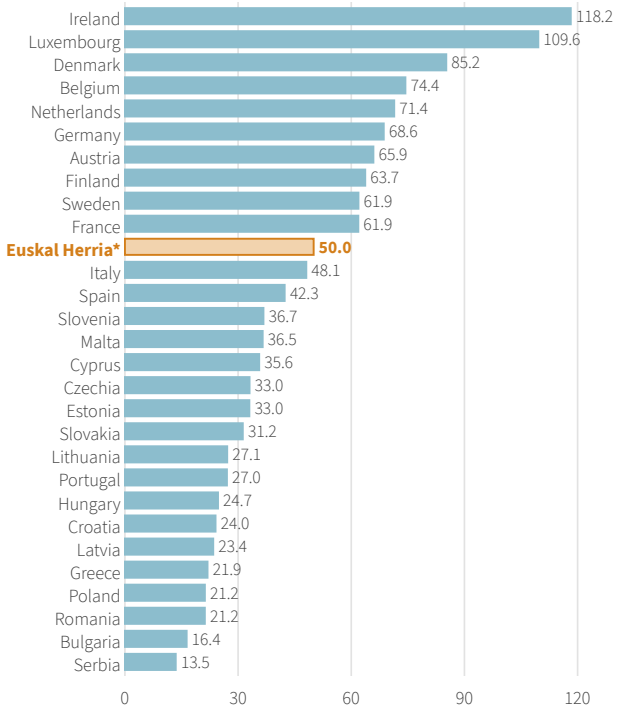
2.5
LABOUR: PRODUCTIVITY, LABOUR COST, WAGES AND CARE

In productivity, labour cost and wages, the Basque Country is at an upper-middle level in Europe: below the countries of northern and central Europe and above those of the south.

For each hour worked, the economy of Hego Euskal Herria generated 50 euros in 2023. It would rank 11th among 29 countries, between Sweden and Italy; Ireland and Luxembourg are the most productive. In real terms (excluding the effect of prices), the real productivity index of Hego Euskal Herria was 79.4 in 2000 and 103.7 in 2024 (2015 = 100).

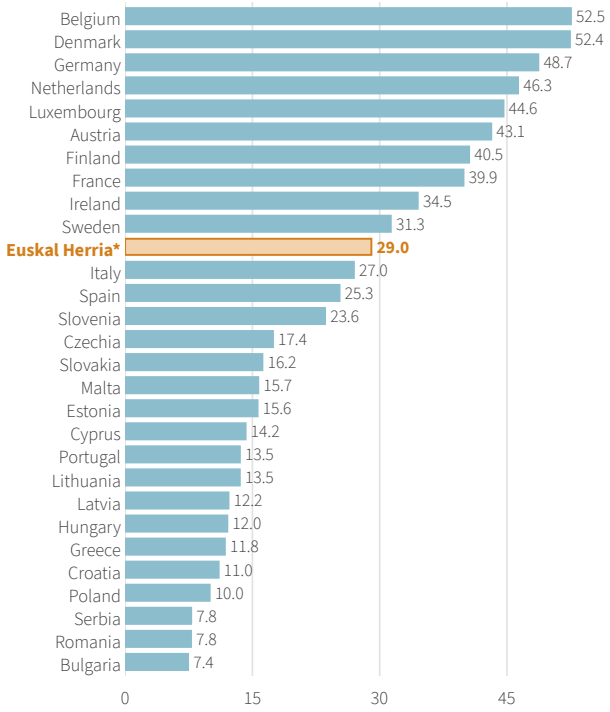
Hourly labour cost in manufacturing was 29 euros in Hego Euskal Herria (2023): 11th among 29 countries, between Sweden and Italy. The labour share of value added, also imputing the labour of the self-employed, is 60.7% in Hego Euskal Herria, in the middle range of the countries (16th).

Labour productivity, European countries and Euskal Herria* (euros per hour worked, 2023)



Note: * Euskal Herria*: Iparralde is not included in this indicator (2023). Productivity per hour: GDP at current prices / hours worked (nominal terms). Real productivity: GDP at constant prices / hours (index, 2015 = 100).
Source: Eurostat. Compiled by Gaindegia.

Hourly labour cost in manufacturing, European countries and Euskal Herria* (euros per hour, 2023)

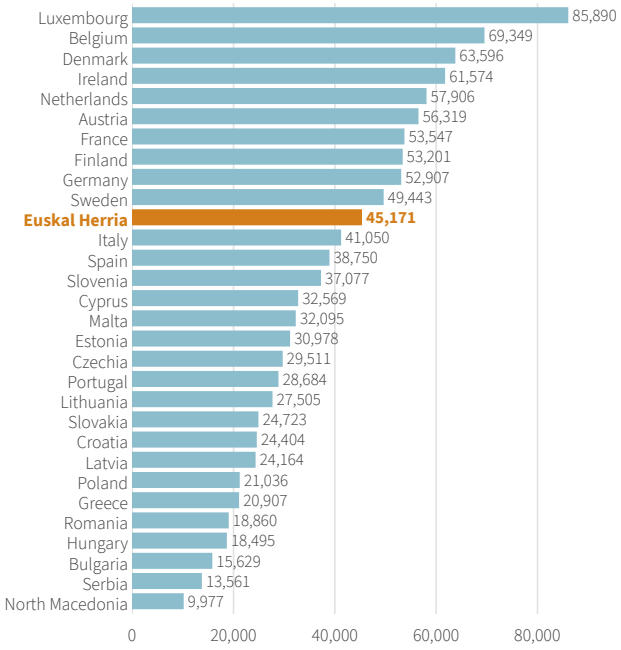


Note: * Euskal Herria*: Iparralde is not included in this indicator (2023). Euskal Herria*: excluding Iparralde; for Iparralde there are no data based on its own information.
Source: Eurostat. Compiled by Gaindegia.

Compensation per employee was 45,171 euros in Euskal Herria in 2023 (46,813 euros in 2024). It ranks 11th among 30 countries, after Germany and Sweden and ahead of Italy; among the regions, 56th out of 110.

In unpaid work, women in the Basque Autonomous Community spend 158 minutes a day on housework and men 110 (2023). In the European countries with data (2020), women's time is higher, but so is men's, and the gap is generally larger. In care, by contrast, the time spent by men in the Basque Autonomous Community is among the highest in Europe.

Compensation per employee, European countries and the Basque Country (euros per year, 2023)



Note: Nominal euros, not adjusted for price levels.
Source: EUSTAT, INSEE, Eurostat. Compiled by Gaindegia.

Time spent on housework and care, by sex (minutes per day; European countries, Basque Autonomous Community 2023)

Country	Housework: women	Housework: men	Care: women	Care: men
Basque Autonomous Community	**158**	**110**	**44**	**31**
Austria	194	119	40	19
Bulgaria	231	124	31	13
Germany	191	135	37	19
Estonia	183	128	31	15
Finland	184	143	28	21
Croatia	232	149	36	21
Hungary	234	151	45	22
Netherlands	175	124	32	19
Norway	175	132	37	27
Poland	224	149	60	31
Serbia	224	117	34	15
France (2010)	–	–	31	14
Italy (2010)	–	–	29	16
Spain (2010)	–	–	39	26

Note: Countries: all those in the HETUS 2020 wave; France, Italy and Spain, 2010 wave (latest available), and only the figure for caring for household members. Basque Autonomous Community: EUSTAT Time Use Survey (HETUS guidelines). Housework and caring for household members are measured separately (care is not included in housework); average for the whole population. There are no comparable data for the Basque Country as a whole.
Source: EUSTAT (Time Use Survey), Eurostat (HETUS). Compiled by Gaindegia.



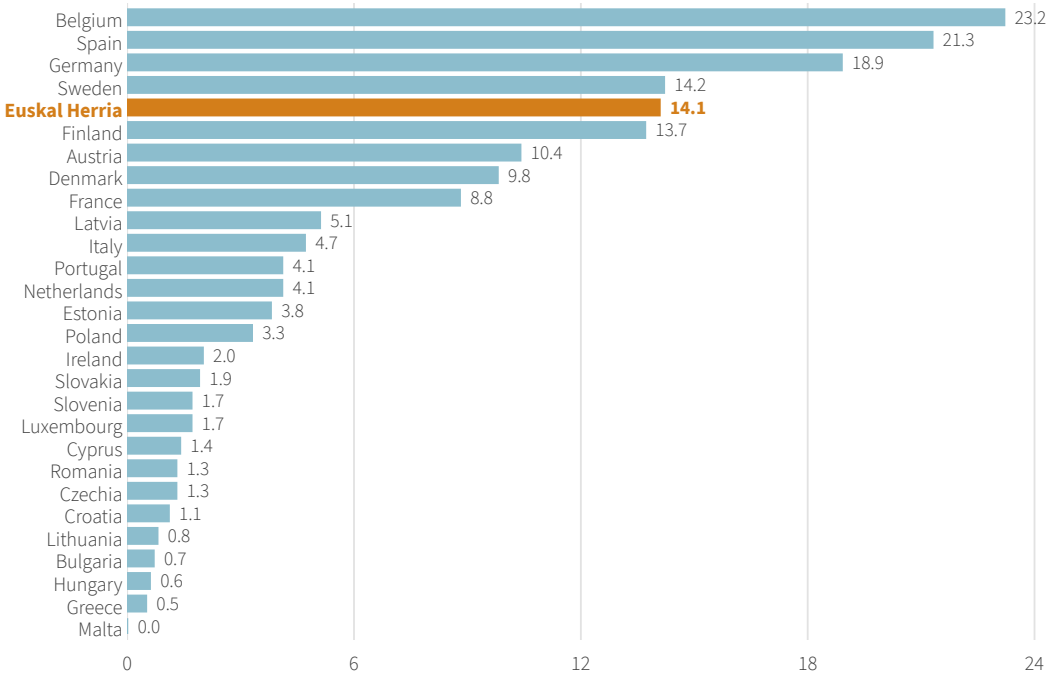
2.6
PUBLIC DEBT

The debt of the regional governments and local authorities stood at 14.1% of GDP in Euskal Herria in 2023: one of the highest in Europe, on a par with federal states and those with strong regional governments.

In 2025, the debt of the regional governments and local authorities of Hego Euskal Herria stood at 13.7% of GDP. It would rank 6th among 28 countries, behind Belgium (23.2%), Spain (21.3%), Germany (18.9%), Sweden (14.2%) and Finland (13.7%). In countries where these levels of government have few powers (Malta, Greece, Hungary), debt is below 1%.

For the Basque Country as a whole, debt stood at 14.1% of GDP in 2023: that year, 4th among the countries.

Public debt: regional governments and local authorities, European countries and Euskal Herria (% of GDP, 2025)



Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 13.7 (2025). Excluding central government debt: only the debt of regional governments (in federal countries, of the federated states) and local authorities. Euskal Herria: reduced coverage for Iparralde (local authorities).
Source: Banco de España, Spanish Ministry of Finance, DGFiP, Eurostat (government finance statistics). Compiled by Gaindegia.

SUMMARY: THE ECONOMY IN EUROPE

High level of prosperity. In GDP per capita (42,332 PPS), Euskal Herria would rank 9th among 32 countries and 27th among 110 regions.

An industrial economy. Manufacturing generates 21.1% of value added: the 5th largest share among the countries. The average size of industrial establishments (18.2 persons employed) is the 4th largest among the countries.

Research. In R&D expenditure, Hego Euskal Herria is at an upper-middle level (9th), and in the share of R&D personnel, the Basque Country is at the high European level (6th, 2023).

Labour. Productivity, labour cost and wages are at an upper-middle European level (11th, 11th and 11th respectively). In unpaid work, the gap between women and men in the Basque Autonomous Community is smaller than in most European countries.

Enterprises and the social economy. Enterprise creation is modest (23rd out of 27 countries), but in employment in cooperatives the Basque Country ranks first in Europe.

Main economic indicators: value and rank of the Basque Country in Europe

Indicator (year)	Euskal Herria	Rank among countries	Rank among regions
GDP per capita, PPS (2023)	42,332	9 / 32	27 / 110
Share of industry, % of GVA (2023)	24.3%	7 / 33	27 / 110
Share of manufacturing, % of GVA (2023)	21.1%	5 / 33	20 / 110
Exports of goods, % of GDP (2023)	36.0%	19 / 38	–
Trade balance, % of GDP (2024)*	6.4%	9 / 38	–
R&D expenditure, % of GDP (2024)*	2.2%	9 / 33	31 / 109
R&D personnel, % of total employment (2023)	2.1%	6 / 34	19 / 109
Labour productivity, euros per hour (2023)*	50.0	11 / 29	–
Hourly labour cost in manufacturing, euros per hour (2023)*	29.0	11 / 29	–
Compensation per employee, euros per year (2023)	45,171	11 / 30	56 / 110
Enterprise birth rate, % (2023)	8.2%	23 / 27	78 / 107
Employment in cooperatives, % of employed persons (2021)	4.9%	1 / 26	–
Average size of industrial establishments, persons employed (2024)	18.2	4 / 31	20 / 107
Public debt (regional governments and local authorities), % of GDP (2023)	14.1%	4 / 28	–

Note: Rank: 1 = highest value; after the slash, number of territories in the list. Rank of Euskal Herria* (excluding Iparralde) among countries, with the most recent data: Public debt (regional governments and local authorities), % of GDP: 6 / 28 (2025). * Euskal Herria*: Iparralde is not included in this indicator.
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.





3 SOCIETY

One of the most highly educated populations in Europe: in tertiary education, the Basque Country ranks second among countries

Income is among the highest in Europe and the risk of poverty among the lowest; the employment rate, however, is in the middle range. The Basque Country compared with European countries and regions.

56.4%

population aged 25-64 with tertiary education, Euskal Herria* (2025): the 2nd highest percentage among 35 countries

26,078

disposable household income per capita, PPS, Euskal Herria* (2023): the 2nd highest among 28 countries

15.1%

at risk of poverty or social exclusion, Euskal Herria* (2025): the 3rd lowest among 32 countries

71.9%

employment rate, aged 15-64, Euskal Herria* (2025): 20th among 35 countries

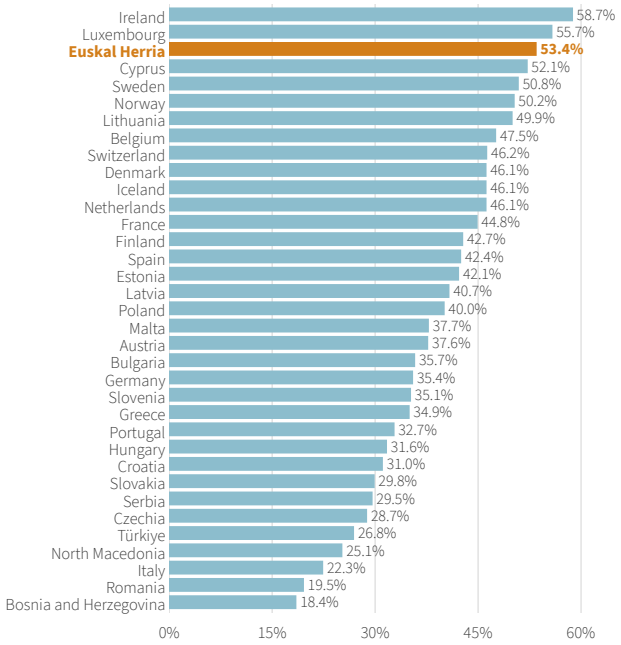
3.1
WORK AND EDUCATION

The population of Euskal Herria is one of the most highly educated in Europe: more than half of people aged 25-64 have tertiary education, and among countries only Ireland has a higher proportion. The employment rate, by contrast, is in the middle of the European range.

In 2025, 56.4% of the population aged 25-64 in Hego Euskal Herria had tertiary education: the 2nd highest percentage among 35 countries, behind Ireland (58.7%) and on a par with Luxembourg (55.7%). Among women it is 61.1% (2nd) and among men 51.8% (3rd). Among the regions, it ranks 4th out of 110. For the Basque Country as a whole it was 53.4% in 2023 (2nd among the countries).

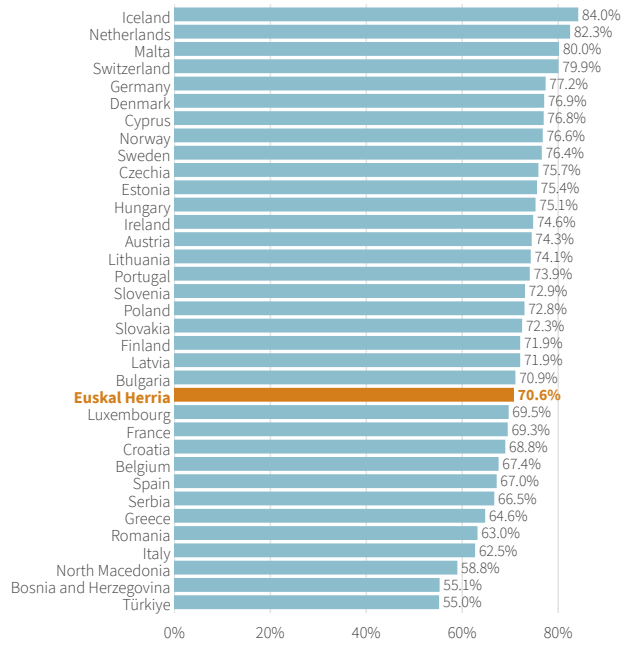
The employment rate of the population aged 15-64 was 71.9% in Hego Euskal Herria in 2025: 20th among 35 countries, on a par with Finland and Latvia; Iceland, the Netherlands and Malta top the list, with 80% or more. Among the regions, it ranks 50th out of 110. For Euskal Herria as a whole it was 70.6% in 2023 (23rd among the countries).

Population aged 25-64 with tertiary education, European countries and Euskal Herria (%, 2025)



Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 56.4% (2025). Euskal Herria: Iparralde data from the census (not from the Labour Force Survey).
Source: EUSTAT, INE (LFS), INSEE (census), Eurostat (EU-LFS). Compiled by Gaindegia.

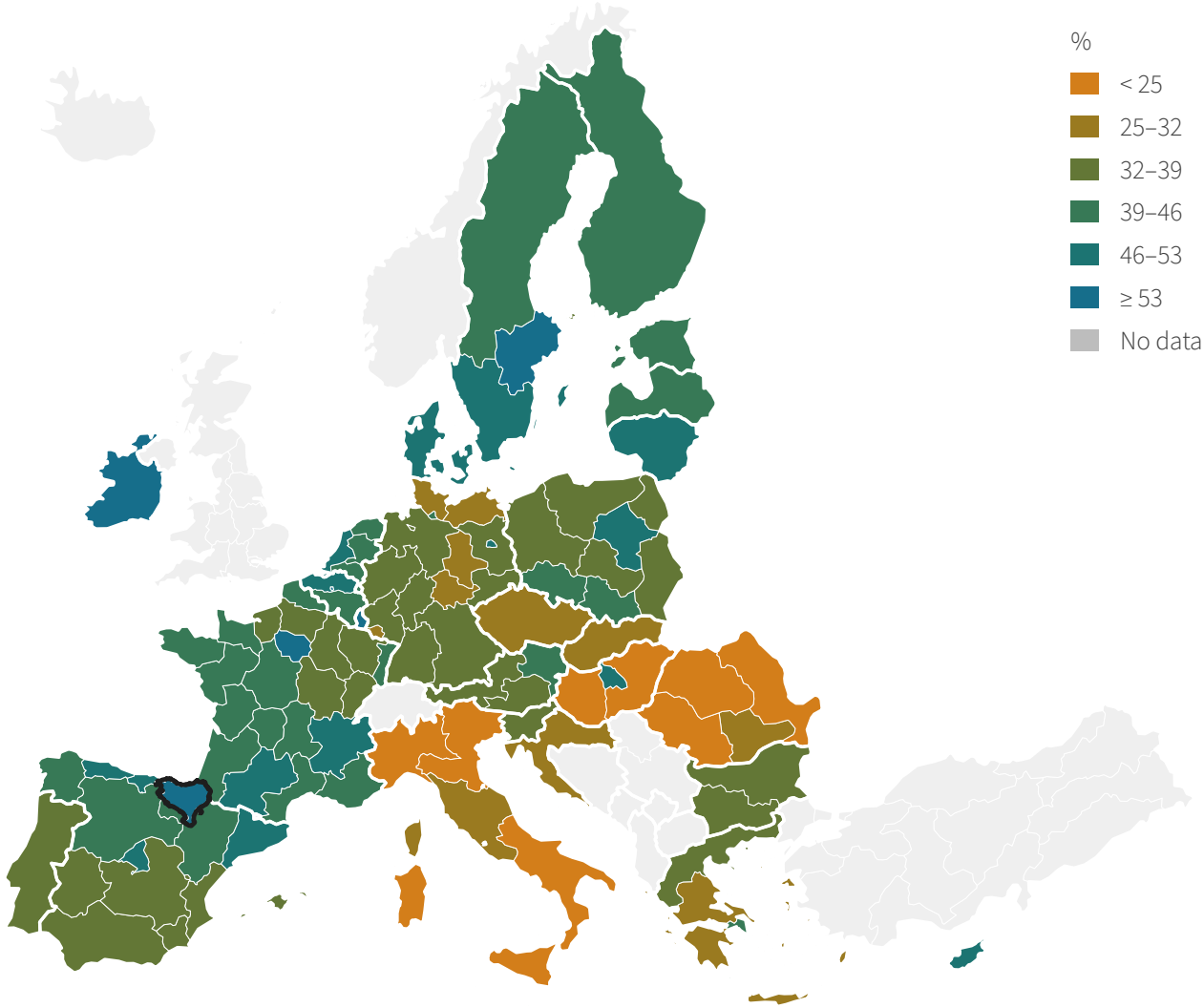
Employment rate (aged 15-64), European countries and Euskal Herria (%, 2025)



Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 71.9% (2025).
Source: EUSTAT, INE (LFS), INSEE, Eurostat (EU-LFS). Compiled by Gaindegia.

On the regional map, the highest proportions of people with tertiary education are concentrated in capital regions and in northern Europe, and the Basque Country belongs to that group. It is clearly above its neighbouring regions: Aquitaine 44%, Midi-Pyrénées 47.9%, Cantabria 47.8% and La Rioja 41.4%.

Population aged 25-64 with tertiary education, European regions (%, 2025)



Note: Euskal Herria: Iparralde data from the census (not from the Labour Force Survey).
Source: EUSTAT, INE (LFS), INSEE (census), Eurostat (EU-LFS). Compiled by Gaindegia.

The Basque Country and neighbouring regions: employment rate (15-64) and tertiary education, by sex (%, 2025)

Region	Employment rate	Tertiary education	Tertiary: women	Tertiary: men
Aquitaine	72.9%	44.0%	48.9%	38.9%
Midi-Pyrénées	71.8%	47.9%	50.1%	45.6%
La Rioja	71.1%	41.4%	45.8%	37.0%
Euskal Herria	**70.6%**	**53.4%**	**56.9%**	**49.9%**
Aragón	70.0%	41.0%	44.2%	37.9%
Castilla y León	69.1%	42.1%	47.5%	36.9%
Cantabria	68.3%	47.8%	52.6%	42.9%

Note: Euskal Herria: 2023 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 56.4% (2025).
Source: EUSTAT, INE (LFS), INSEE, Eurostat (EU-LFS). Compiled by Gaindegia.

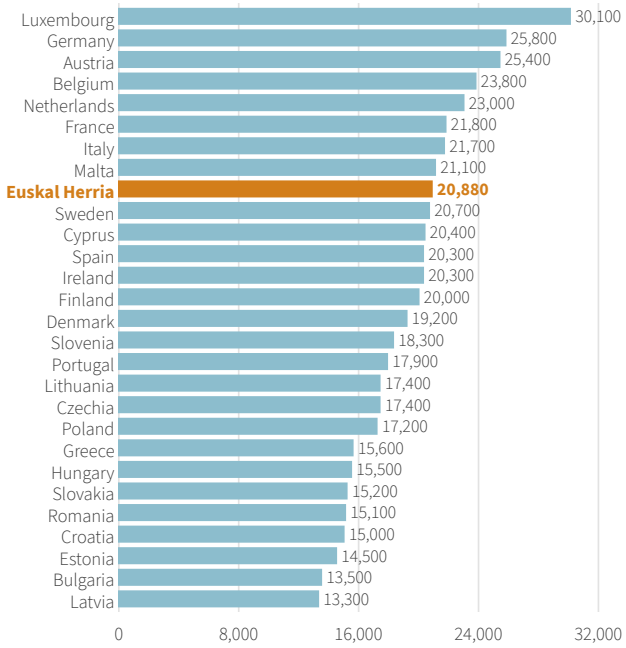
3.2
INCOME, PRICES AND INEQUALITY

Disposable household income in the Basque Country is among the highest in Europe. Income inequality and price increases, by contrast, are in the middle of the European range.

In 2023, disposable household income per capita was 26,078 PPS in Hego Euskal Herria: the 2nd highest among 28 countries, behind Luxembourg and ahead of Germany and Austria. Among the regions, it ranks 8th out of 110, on a par with Hesse and Ile-de-France. The latest figure for Euskal Herria as a whole is for 2021: 20,880 PPS, 4th among the countries.

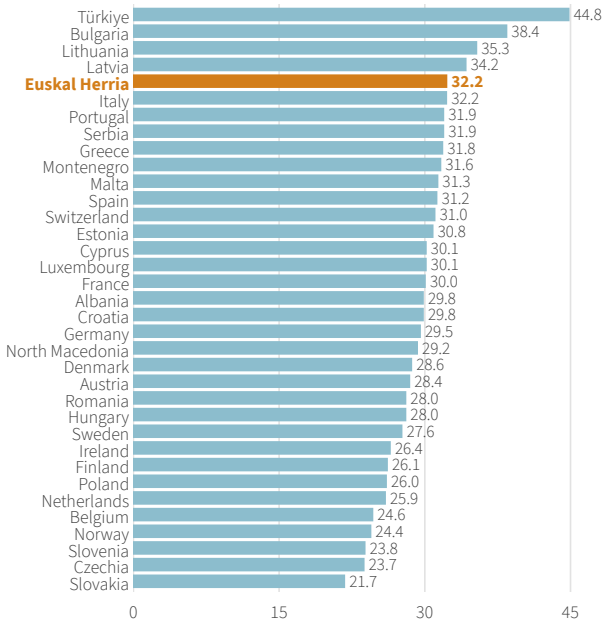
The Gini coefficient is 29.7 in Hego Euskal Herria (2024): 19th among 35 countries, on a par with Croatia and Germany. Türkiye, Bulgaria and Lithuania are the most unequal, and Slovenia, Czechia and Slovakia the most equal. For the Basque Country as a whole it was 32.2 in 2021 (13th). Prices rose by 2.9% in Hego Euskal Herria in 2025: 20th among 37 countries, in the middle of the European range.

Disposable household income per capita, European countries and Euskal Herria (PPS, 2023)



Note: Euskal Herria: 2021 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 26,078 (2023). PPS: purchasing power standard, euros adjusted for differences in price levels between countries.
Source: EUSTAT, INE, Eurostat. Compiled by Gaindegia.

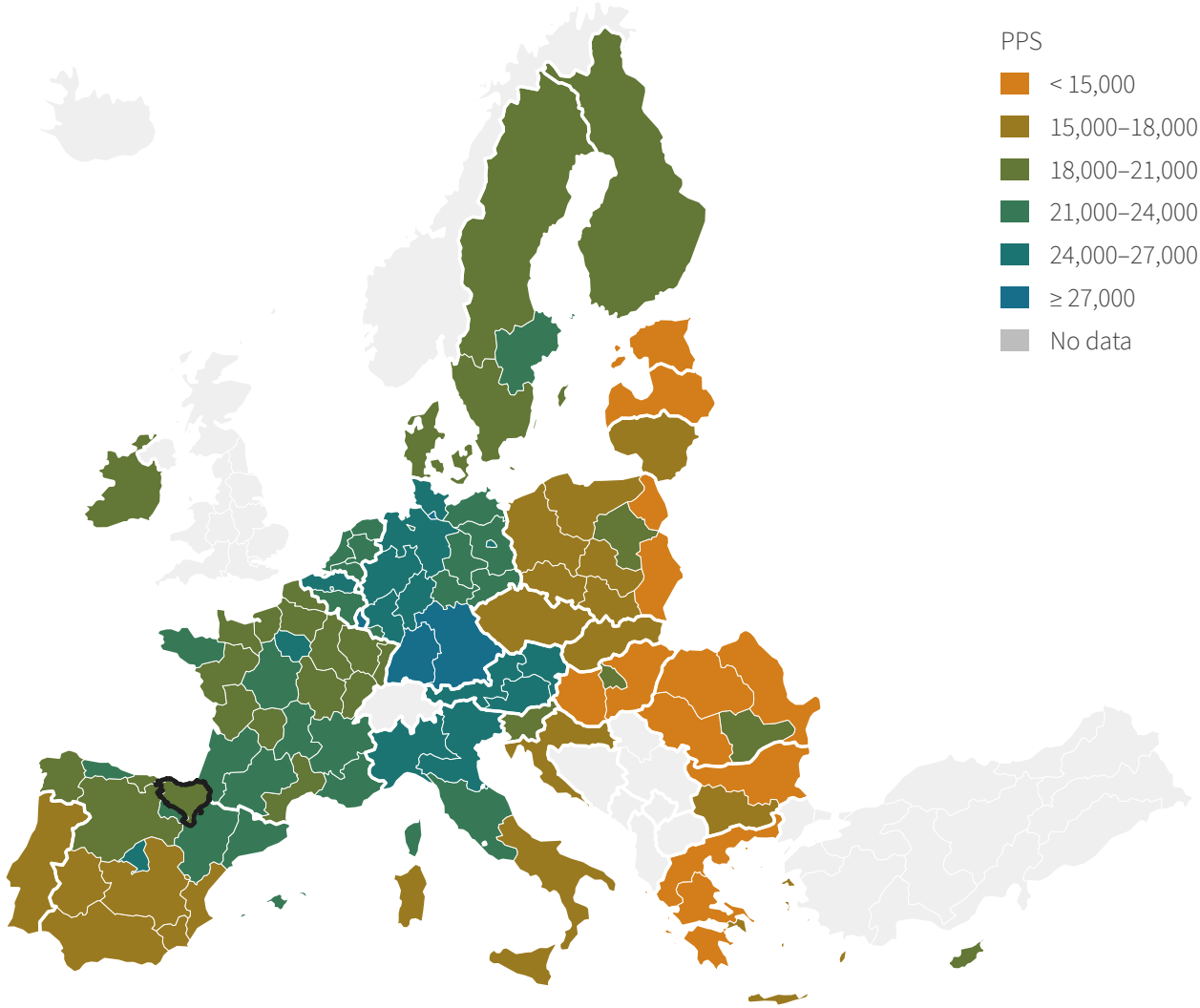
Gini coefficient, European countries and Euskal Herria (0-100, 2024)



Note: Euskal Herria: 2021 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 29.7 (2024). Higher values indicate greater inequality.
Source: EUSTAT, INE, Eurostat (EU-SILC). Compiled by Gaindegia.

The map of disposable household income distinguishes the north-west from the south-east: Germany, Austria, Luxembourg and northern Italy at the top, and eastern Europe and Greece at the bottom. Hego Euskal Herria (26,078 PPS) ranks 8th out of 110 regions, on a par with Hesse and Ile-de-France.

Disposable household income per capita, European regions (PPS, 2023)



Note: Euskal Herria: 2021 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 26,078 (2023). Regions of the European Union: 2023 data. In grey: no data; in light grey: outside the EU. With a black border: Euskal Herria.
Source: EUSTAT, INE, Eurostat. Compiled by Gaindegia.

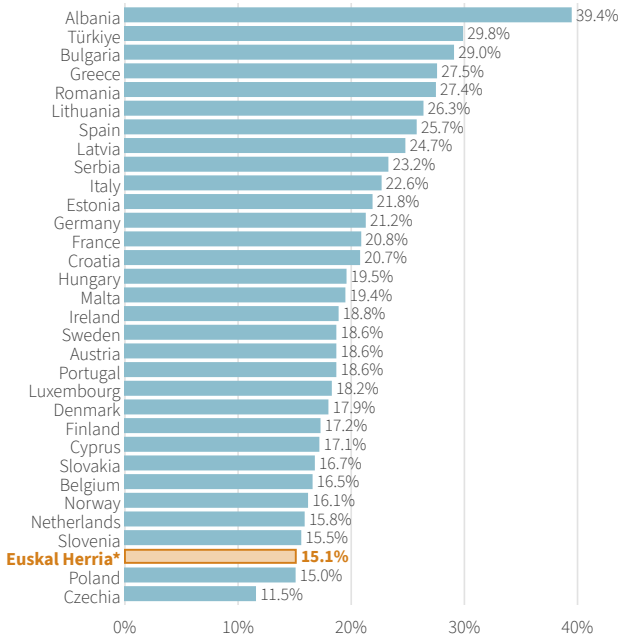
3.3
RISK OF POVERTY AND WELL-BEING

The proportion of the population at risk of poverty or social exclusion is one of the lowest in Europe, and life satisfaction is in the middle of the European range.

In 2025, 15.1% of the population of Hego Euskal Herria was at risk of poverty or social exclusion (AROPE). Among 32 countries, only Czechia and Poland have a lower rate; Albania, Türkiye and Bulgaria have the highest rates. Among the regions, it is the 14th lowest out of 109.

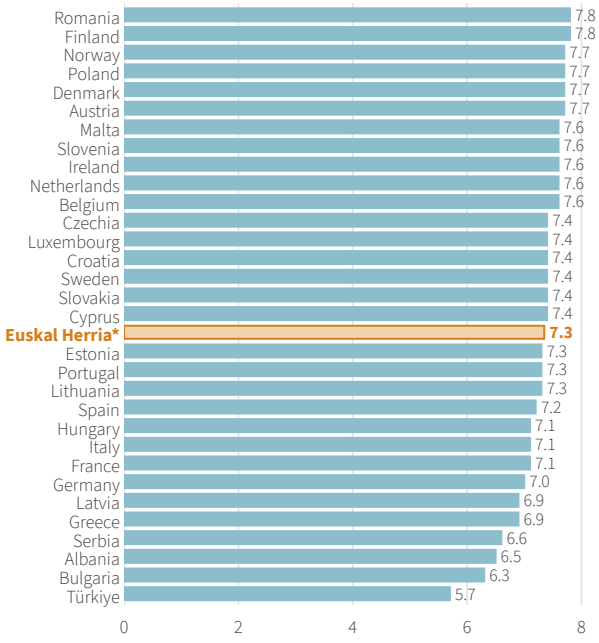
Life satisfaction, on a scale of 0 to 10, is 7.35 in Hego Euskal Herria (2025): 18th among 32 countries, on a par with Sweden and Lithuania. Finland, Romania, Denmark and Austria report the highest satisfaction, and Türkiye and Bulgaria the lowest.

At risk of poverty or social exclusion (AROPE), European countries and Euskal Herria* (%, 2025)



Note: * Euskal Herria*: Iparralde is not included in this indicator (2025).
Source: EUSTAT, INE, Eurostat (EU-SILC). Compiled by Gaindegia.

Life satisfaction, European countries and Euskal Herria* (0-10, 2025)

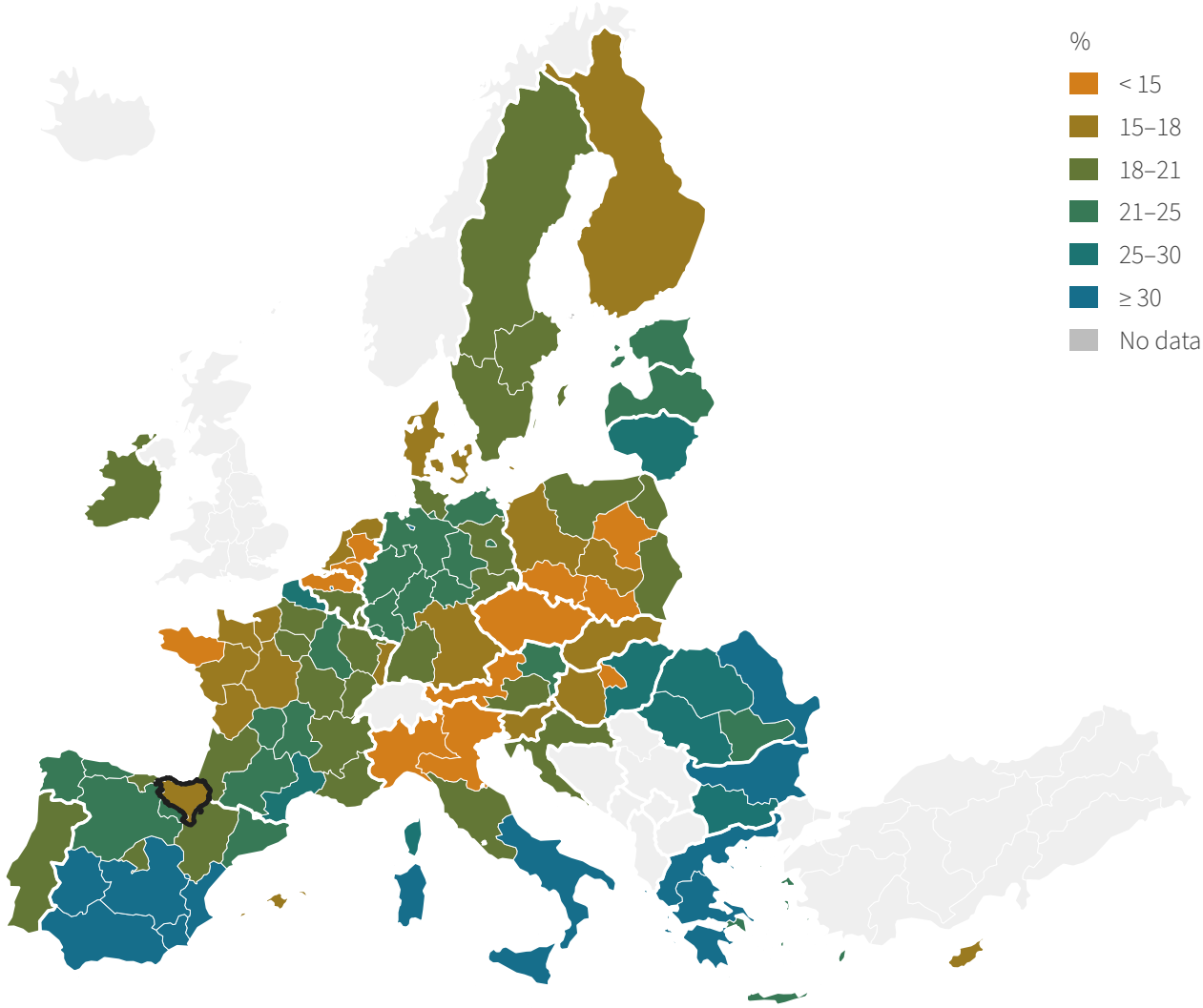


Note: * Euskal Herria*: Iparralde is not included in this indicator (2025).
Source: EUSTAT, INE, Eurostat (EU-SILC). Compiled by Gaindegia.



The risk of poverty or social exclusion has a southern geography: southern Italy and the islands, Andalusia, Ceuta and Melilla top the list, and the regions of Poland, Czechia, Flanders and north-eastern Italy are at the bottom. Hego Euskal Herria (15.1%) has the 14th lowest rate among 109 regions, and all its neighbouring regions have a higher rate.

At risk of poverty or social exclusion (AROPE), European regions (%, 2025)



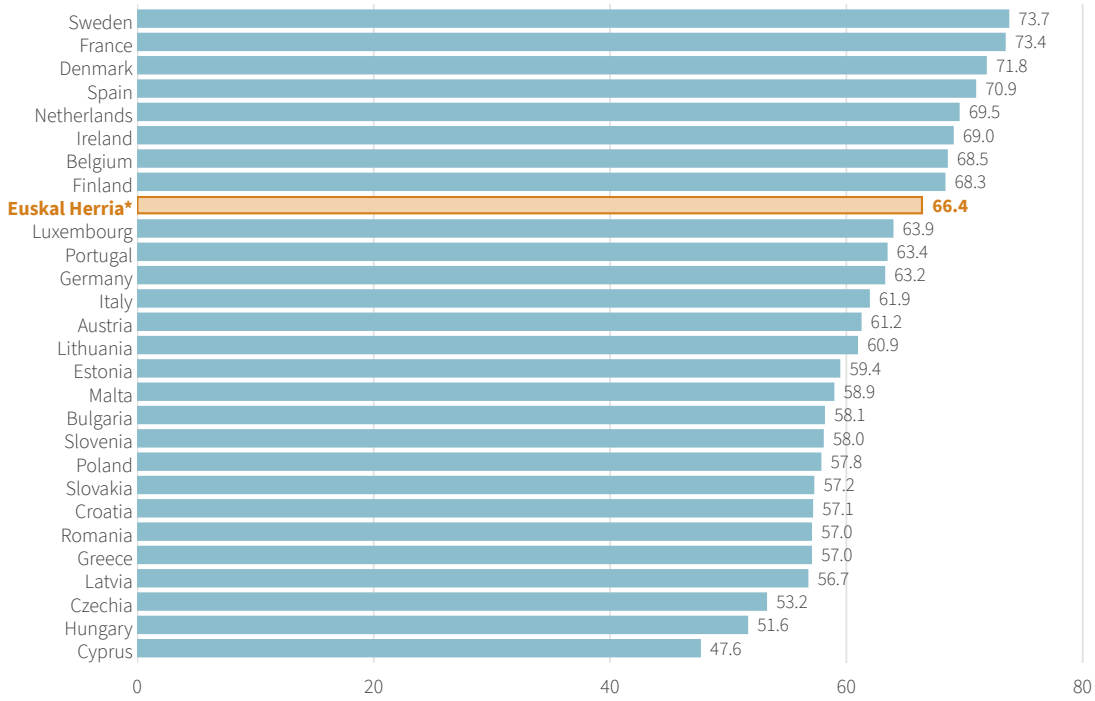
Note: * Euskal Herria*: Iparralde is not included in this indicator. Regions of the European Union: 2025 data. In grey: no data; in light grey: outside the EU. With a black border: Euskal Herria.
Source: EUSTAT, INE, Eurostat (EU-SILC). Compiled by Gaindegia.

3.4
GENDER EQUALITY

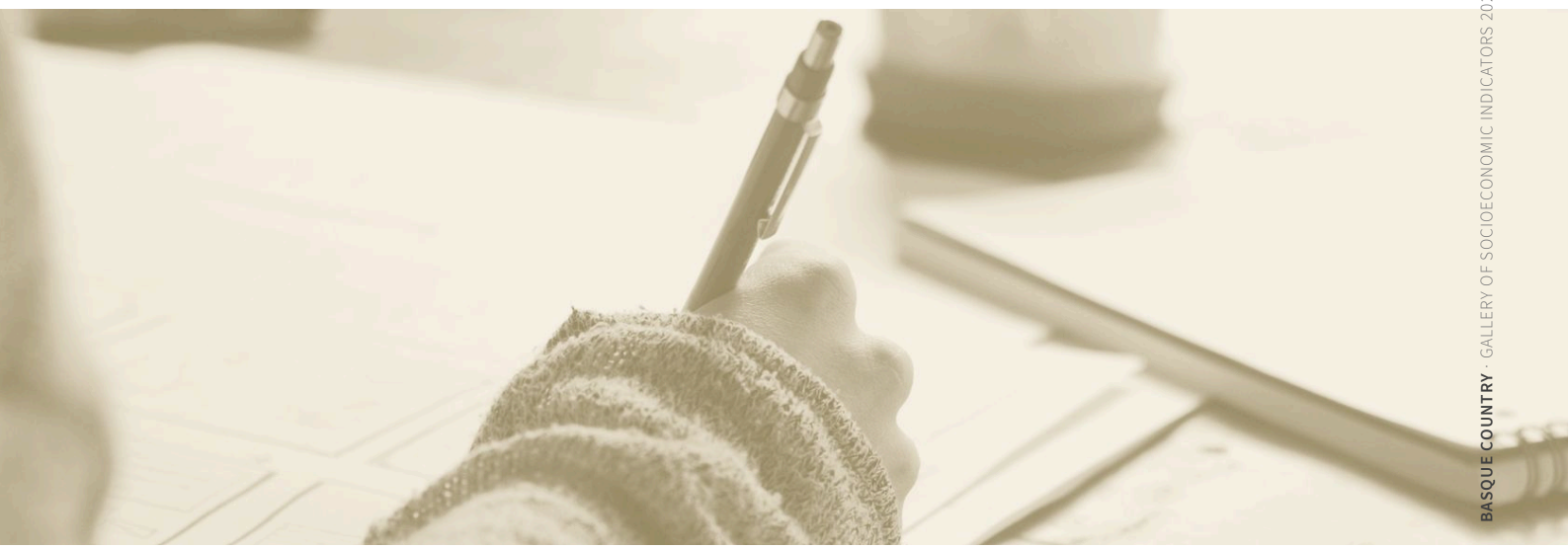
The Gender Equality Index is in the upper half of the European range.

The Gender Equality Index (EIGE, 0-100) was 66.4 in Hego Euskal Herria, in the 2020 edition. Alongside the countries in EIGE's 2025 edition, it would rank 9th among 28 territories. Sweden (73.7), France (73.4), Denmark (71.8) and Spain (70.9) top the list, and Hungary (51.6) and Cyprus (47.6) are at the bottom.

Gender Equality Index, European countries (2025 edition) and Euskal Herria* (2020 edition) (0-100)



Note: * Euskal Herria*: Iparralde is not included in this indicator. Euskal Herria*: 2020 edition, population-weighted mean of the indices of the Basque Autonomous Community and Navarre; countries: EIGE's 2025 edition. The editions do not coincide, and the comparison should be read with caution.
Source: EUSTAT, Emakunde, NASTAT, EIGE (Gender Equality Index). Compiled by Gaindegia.



SUMMARY: SOCIETY IN EUROPE

Education. 56.4% of the population aged 25-64 in Hego Euskal Herria have tertiary education: the 2nd highest percentage among the countries, and 4th among the regions.

Employment. The employment rate of the population aged 15-64 (71.9%, Hego Euskal Herria) is in the middle of the European range (20th among 35 countries).

Income. Disposable household income in Hego Euskal Herria (26,078 PPS) is the second highest in Europe among the countries, and inequality (Gini 29.7) is in the middle range.

Risk of poverty and well-being. In Hego Euskal Herria, the risk of poverty or social exclusion (15.1%) is the third lowest among the countries; life satisfaction (7.35), by contrast, is in the middle range.

Gender equality. The index is 66.4 in Hego Euskal Herria (2020 edition); compared with the countries in EIGE's latest edition, it would rank 9th.

Main social indicators: value and rank of the Basque Country in Europe

Indicator (year)	Euskal Herria	Rank among countries	Rank among regions
Tertiary education, 25-64, % (2023)	53.4%	2 / 35	5 / 110
Employment rate, 15-64, % (2023)	70.6%	23 / 35	58 / 110
Disposable household income per capita, PPS (2021)	20,880	4 / 28	21 / 110
Gini coefficient (2021)	32.2	13 / 35	–
At risk of poverty or social exclusion (AROPE), % (2025)*	15.1%	30 / 32	96 / 109
Annual change in consumer prices (CPI), % (2025)*	2.9	20 / 37	–
Life satisfaction, 0-10 (2025)*	7.35	18 / 32	–
Gender Equality Index, 0-100 (2020)*	66.4	9 / 28	–

Note: Rank: 1 = highest value; after the slash, number of territories in the list. Rank of Euskal Herria* (excluding Iparralde) among countries, with the most recent data: Tertiary education, 25-64, %: 2 / 35 (2025); Employment rate, 15-64, %: 20 / 35 (2025); Disposable household income per capita, PPS: 2 / 28 (2023); Gini coefficient: 19 / 35 (2024). * Euskal Herria*: Iparralde is not included in this indicator.
Source: EUSTAT, INE, INSEE, Eurostat. Compiled by Gaindegia.





4 CULTURE AND LANGUAGES

Basque, the minoritised language of Europe where knowledge has grown most; the share of cultural employment, by contrast, one of the lowest

Cultural employment, public expenditure on culture and minoritised languages: Euskal Herria compared with the countries, regions and languages of Europe.

3.4%

cultural employment, as a share of total employment, Euskal Herria* (2025): 30th among 35 countries

36.1%

Basque speakers among the population aged over 5, Euskal Herria* (2021): the 6th highest share among 14 minoritised languages

€216

public expenditure on culture per capita, Euskal Herria* (2023): the 15th highest among 31 countries

+4.8

points of growth in the share of Basque speakers (2001-2021): the 1st largest increase among 14 minoritised languages

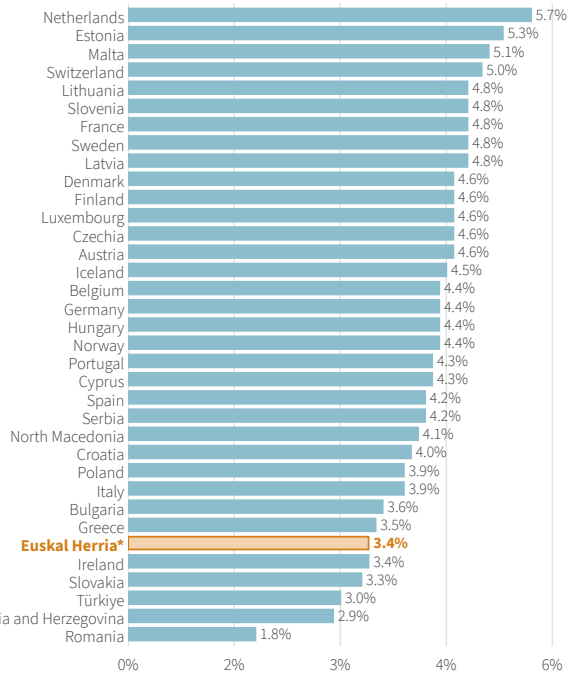
4.1
CULTURAL EMPLOYMENT

The share of culture in total employment is one of the lowest in Europe, compared with the countries.

In 2025, 3.4% of employment in Hego Euskal Herria was in the cultural sphere (44,900 people). It ranks 30th among 35 countries, on a par with Ireland (3.4%) and behind Greece (3.5%); only Slovakia, Türkiye, Bosnia and Herzegovina and Romania have a lower share. The Netherlands (5.7%), Estonia (5.3%), Malta (5.1%) and Switzerland (5%) top the list.

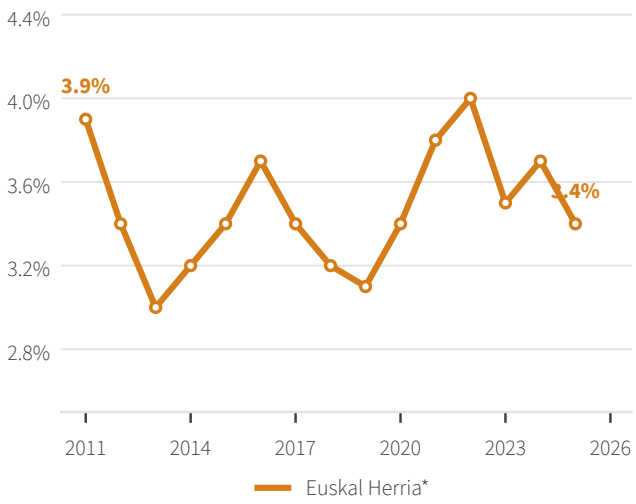
The Hego Euskal Herria series fluctuates strongly: it was 3.9% in 2011, peaked in 2022 (4%, 51,000 people) and stands at 3.4% in 2025.

Cultural employment, as a share of total employment, European countries and Euskal Herria* (%, 2025)



Note: * Euskal Herria*: Iparralde is not included in this indicator. Euskal Herria*: data from the Spanish Ministry of Culture (CULTURABase); countries: Eurostat. The methodologies are not the same.
Source: Spanish Ministry of Culture (CULTURAbase, LFS), Eurostat (cult_emp_sex). Compiled by Gaindegia.

Cultural employment over time, as a share of total employment, Euskal Herria* (%, 2011-2025)



Note: * Euskal Herria*: Iparralde is not included in this indicator. Survey data (Labour Force Survey): year-on-year changes also reflect sampling fluctuations.
Source: Spanish Ministry of Culture (CULTURAbase, LFS). Compiled by Gaindegia.

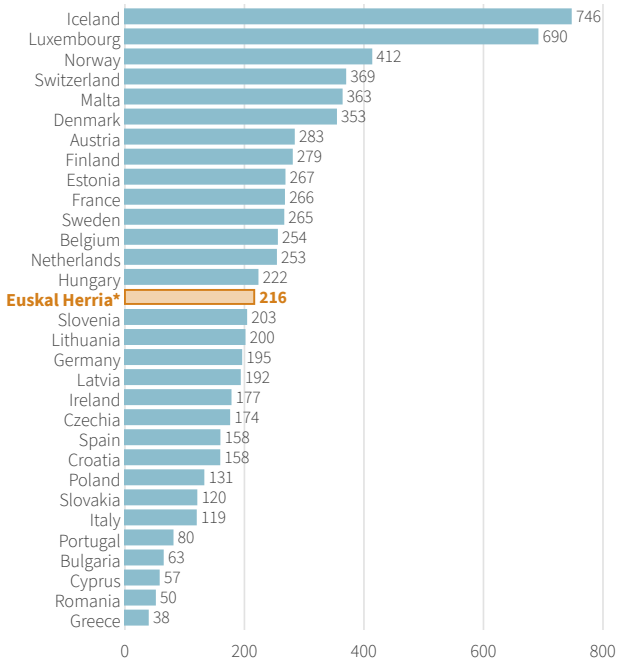
4.2
PUBLIC EXPENDITURE ON CULTURE

Public spending on culture is in the middle of the European range, both per inhabitant and as a share of GDP.

In 2023, the public administrations of Hego Euskal Herria spent 216 euros per inhabitant on culture: 15th among 31 countries, behind Hungary (222) and ahead of Slovenia (203). Iceland (746) and Luxembourg (690) top the list, and Greece (38), Romania (50) and Cyprus (57) are at the bottom. In 2015, expenditure in Hego Euskal Herria was 147 euros per inhabitant.

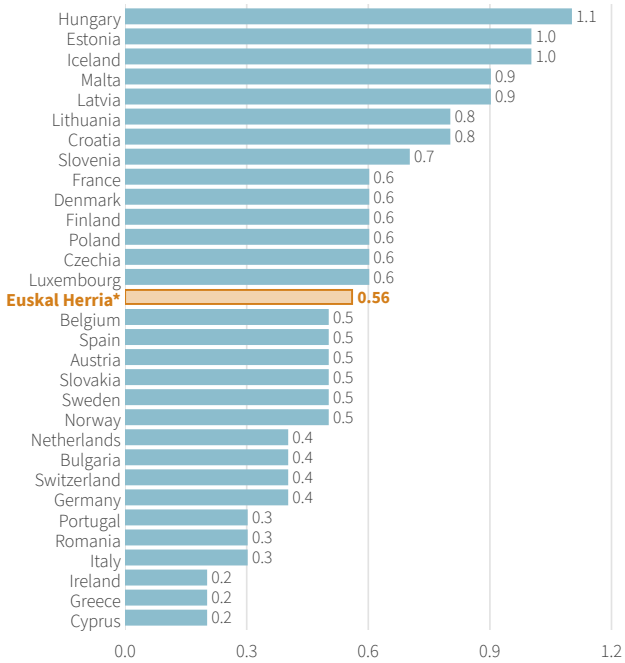
As a share of GDP, public expenditure on culture is 0.56%: 15th, between the countries at 0.6% (France, Denmark, Finland, Czechia…) and those at 0.5%. Hungary (1.1%), Iceland and Estonia (1%) top the list.

Public expenditure on culture per inhabitant, European countries and Euskal Herria* (euros, 2023)



Note: * Euskal Herria*: Iparralde is not included in this indicator. Euskal Herria*: outturn expenditure of the autonomous communities and local authorities (CULTURABase); countries: general government, cultural services (COFOG 08.2). Current euros.
Source: Spanish Ministry of Culture (CULTURAbase, outturn expenditure), Eurostat (gov_10a_exp, COFOG 08.2). Compiled by Gaindegia.

Public expenditure on culture, as a share of GDP, European countries and Euskal Herria* (%, 2023)



Note: * Euskal Herria*: Iparralde is not included in this indicator. Euskal Herria*: outturn expenditure of the autonomous communities and local authorities (CULTURABase); countries: general government, cultural services (COFOG 08.2). Current euros.
Source: Spanish Ministry of Culture (CULTURAbase, outturn expenditure), Eurostat (gov_10a_exp, COFOG 08.2). Compiled by Gaindegia.



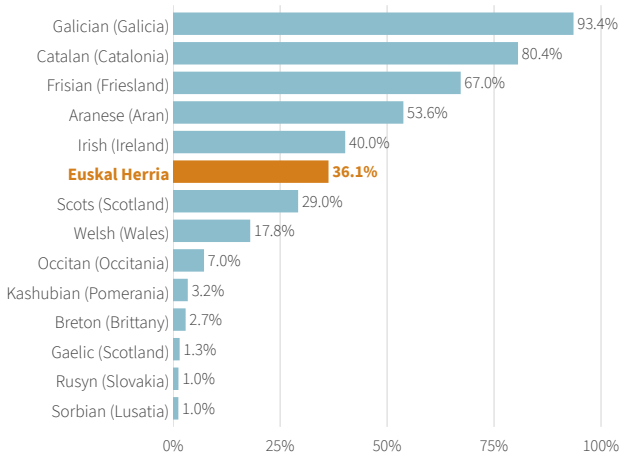
4.3
MINORITISED LANGUAGES IN EUROPE

Basque is at an upper-middle level among Europe's minoritised languages in terms of the share of speakers, and it is the language where knowledge has grown most over the last two decades.

In 2021, 36.1% of the population aged over 5 in Hego Euskal Herria spoke Basque (990,437 people). Among the 14 minoritised languages with official data, it ranks 6th. Galician (93.4), Catalan (80.4) and Frisian (67) have the highest shares of speakers, while Occitan, Kashubian, Breton, Scottish Gaelic, Rusyn and Sorbian are below 10%.

For Euskal Herria as a whole, the share of Basque speakers grew by 4.8 points over the period 2001-2021: the largest increase among the 14 languages, ahead of Kashubian (+2.2). Gaelic and Rusyn are holding steady, and the others have declined: Catalan and Scots have lost around one point; Welsh, Irish, Breton, Aranese (-3.2) and Galician, 3-4 points; and Frisian (-7) and Sorbian (-6) the most.

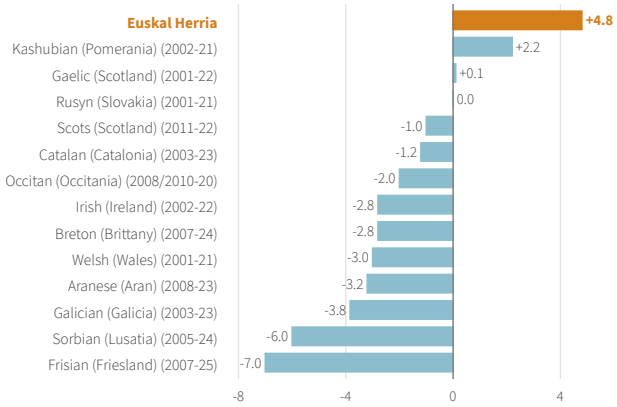
Knowledge of minoritised languages (people able to speak them, % of the population of the territory) (%, latest data)



Note: * Euskal Herria*: Iparralde is not included in this indicator. Knowledge indicator specific to each source: knows how to or can speak (Catalan, Galician, Welsh, Irish, Gaelic, Scots, Aranese); speaks well or very well (Frisian); speaks well or fairly well (Breton); enough to hold a simple conversation (Occitan). Rusyn (mother tongue), Kashubian (language used at home) and Sorbian (estimate of active speakers) are not knowledge indicators in the strict sense. Welsh: 2021 census. Gaelic: the census distinguishes between "knowledge" and "language skills". Scots: the census records language skills (speaking, understanding, reading, writing). Rusyn: mother tongue (the census distinguishes between mother tongue and nationality); percentage calculated on the total population of Slovakia. Sorbian: the German census does not include language questions; the data are estimates. Basque: Basque speakers, 2021 population censuses (Euskal Herria*, aged 5 and over), the same figure as in Part I. Catalan: Catalonia only. Occitan: Occitanie, Nouvelle-Aquitaine and Aran (OPLO). Aranese: aged over 15. Year of latest data: 2020-2025.

Source: EUSTAT, NASTAT (2021 population censuses), Idescat, IGE, ONS, CSO, Région Bretagne, Provincie Fryslân (Fryske Taalatlas), Statistical Office of the Slovak Republic, Statistics Poland (GUS), OPLO, OLCA, National Records of Scotland, Conselh Generau d'Aran, Stiftung für das sorbische Volk. Compiled by Gaindegia.

Change in knowledge of minoritised languages (difference in points between the first and latest data)

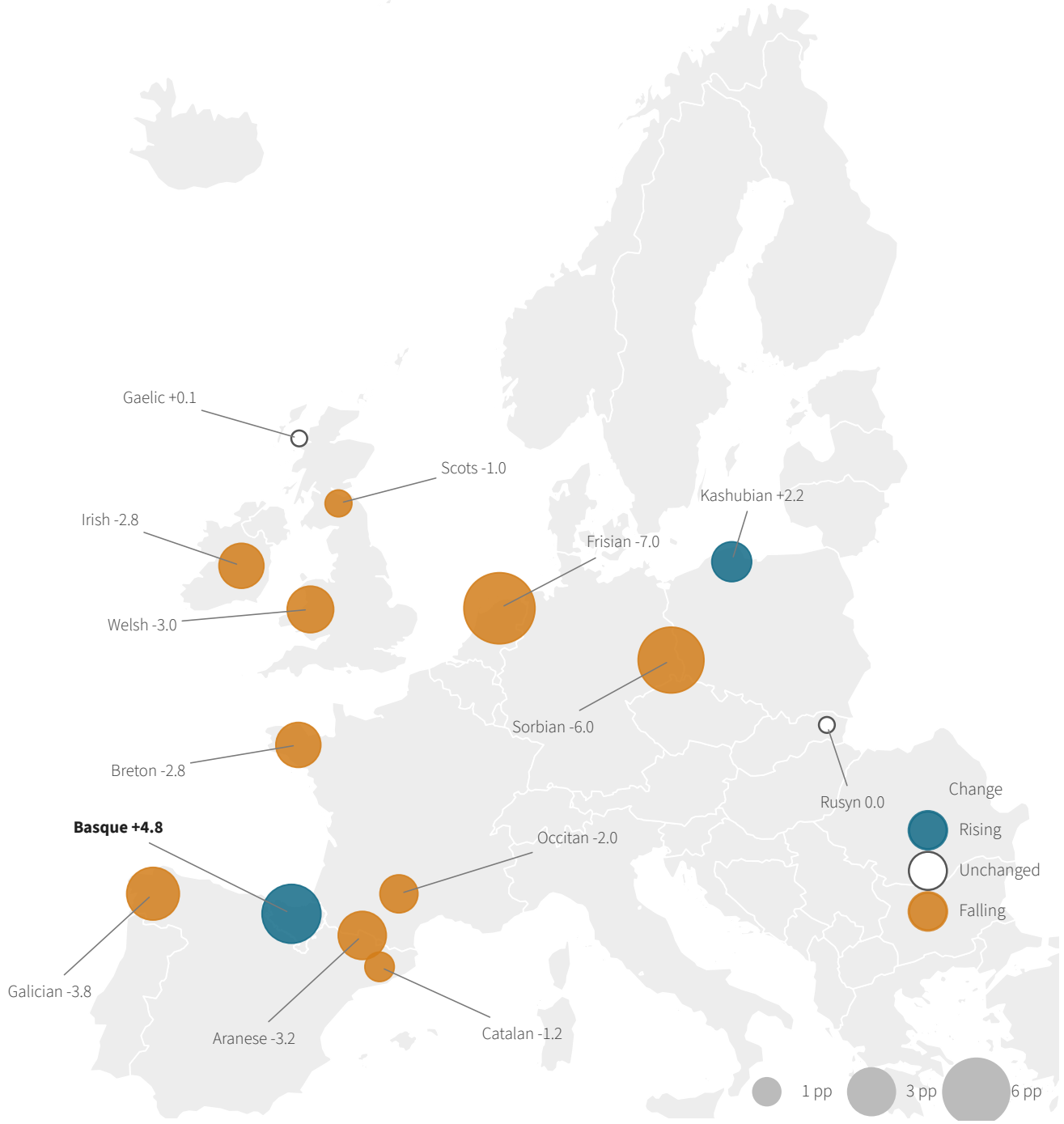


Note: The periods are not the same (10-20 years; see table). Basque: Sociolinguistic Survey (the Basque Country as a whole, aged 16 and over), 2001-2021. Frisian: Taalatlas 2026, compared with 2007 data. Occitan: 2020 survey, harmonised with those of 2008 (Aquitaine) and 2010 (Midi-Pyrénées). Aranese: harmonised series for 2008, 2013 and 2018. Gaelic: "speaks it" indicator. Kashubian: mother tongue in 2002 and home language in 2021, with the option of declaring more than one language (different questions). Sorbian: 2005 estimate and active speakers in 2024. These last three are not fully comparable.

Source: Basque Government, Government of Navarre, Euskararen Erakunde Publikoa (Sociolinguistic Survey), Idescat, IGE, ONS, CSO, Région Bretagne, Provincie Fryslân (Fryske Taalatlas), Statistical Office of the Slovak Republic, Statistics Poland (GUS), OPLO, OLCA, National Records of Scotland, Conselh Generau d'Aran, Stiftung für das sorbische Volk. Compiled by Gaindegia.

As regards use, people who used Basque as much as or more than Spanish or French accounted for 17.5% in 2021 (467,700 people), and 14.6% in 2001.

Change in knowledge of minoritised languages (difference in points between the first and latest data)



Note: The area of the circle is proportional to the difference in points; the colour shows the direction (unchanged: ±0.5 points or less). The periods are not the same (10-20 years; see table). Basque: Sociolinguistic Survey (Euskal Herria as a whole, aged 16 and over), 2001-2021. Frisian: Taalatlas 2026, compared with 2007 data. Occitan: 2020 survey, harmonised with those of 2008 (Aquitaine) and 2010 (Midi-Pyrénées). Aranese: harmonised series for 2008, 2013 and 2018. Gaelic: "speaks it" indicator. Kashubian: mother tongue in 2002 and home language in 2021, with the option of declaring more than one language (different questions). Sorbian: 2005 estimate and active speakers in 2024. These last three are not fully comparable.
Source: Basque Government, Government of Navarre, Euskararen Erakunde Publikoa (Sociolinguistic Survey), Idescat, IGE, ONS, CSO, Région Bretagne, Provincie Fryslân (Fryske Taalatlas), Statistical Office of the Slovak Republic, Statistics Poland (GUS), OPLO, OLCA, National Records of Scotland, Conselh Generau d'Aran, Stiftung für das sorbische Volk. Compiled by Gaindegia.

Minoritised languages in Europe: knowledge, change and use (latest data)

Language (territory)	Period	Knowledge, %	Change, points	Use, %
Galician (Galicia)	2003-2023	93.4%	-3.8	46.2%
Catalan (Catalonia)	2003-2023	80.4%	-1.2	32.6%
Frisian (Friesland)	2007-2025	67.0%	-7.0	–
Aranese (Aran)	2008-2023	53.6%	-3.2	19.7%
Irish (Ireland)	2002-2022	40.0%	-2.8	3.9%
Basque (Euskal Herria*)	**2001-2021**	**36.1%**	**+4.8**	**17.5%**
Scots (Scotland)	2011-2022	29.0%	-1.0	–
Welsh (Wales)	2001-2021	17.8%	-3.0	14.8%
Occitan (Occitania)	2008/2010-2020	7.0%	-2.0	4.0%
Kashubian (Pomerania)	2002-2021	3.2%	+2.2	1.6%
Breton (Brittany)	2007-2024	2.7%	-2.8	–
Gaelic (Scotland)	2001-2022	1.3%	+0.1	0.5%
Rusyn (Slovakia)	2001-2021	1.0%	0.0	–
Sorbian (Lusatia)	2005-2024	1.0%	-6.0	–

Note: Basque: knowledge, 2021 population censuses (Euskal Herria*, aged 5 and over); period, change and use, Sociolinguistic Survey (Euskal Herria as a whole, aged 16 and over; people who use Basque as much as or more than Spanish or French). The use indicator is specific to each source and they are not comparable: usual language (Catalan, Aranese), always or mostly in Galician (Galician), Annual Population Survey (Welsh), at least once a week (Occitan), at home (Gaelic, Kashubian); the two Irish figures are measured with different indicators. Rusyn: percentage calculated on the total population of Slovakia. Languages without a knowledge percentage or a quantified change have been excluded (Corsican, Sami, Alsatian, Mirandese, Limburgish, Low Saxon and Sardinian).
Source: EUSTAT, NASTAT (2021 population censuses), Basque Government, Government of Navarre, Euskararen Erakunde Publikoa (Sociolinguistic Survey), Idescat, IGE, ONS, CSO, Région Bretagne, Provincie Fryslân (Fryske Taalatlas), Statistical Office of the Slovak Republic, Statistics Poland (GUS), OPLO, OLCA, National Records of Scotland, Conselh Generau d'Aran, Stiftung für das sorbische Volk. Compiled by Gaindegia.



SUMMARY: CULTURE IN EUROPE

Cultural employment. 3.4% of employment in Hego Euskal Herria is in the cultural sphere (2025): 30th out of 35 among the countries, one of the lowest in Europe.

Public expenditure. Public spending on culture (216 euros per inhabitant, 0.56% of GDP) is in the middle of the European range: 15th among 31 countries.

Languages. 36.1% of the population aged over 5 in Hego Euskal Herria speak Basque (2021): the 6th highest share among 14 minoritised languages, and the language where knowledge has grown most since 2001 (+4.8 points).

Main culture indicators: value and rank of Euskal Herria* in Europe

Indicator (year)	Euskal Herria*	Rank among countries
Cultural employment, % of employment (2025)*	3.4%	30 / 35
People working in culture (2025)*	44,900	–
Public expenditure on culture per inhabitant, euros (2023)*	216	15 / 31
Public expenditure on culture, % of GDP (2023)*	0.56	15 / 31

Note: Rank: 1 = highest value; after the slash, number of territories in the list. * Euskal Herria*: Iparralde is not included in this indicator. Employment and expenditure on culture: Euskal Herria*, Spanish Ministry of Culture; countries, Eurostat. Owing to methodological differences, the ranks are indicative.
Source: Spanish Ministry of Culture (CULTURAbase), Eurostat. Compiled by Gaindegia.





5 ENVIRONMENT

Among the best in Europe for the status of rivers and among the lowest in energy intensity; the share of renewables, by contrast, in the middle range

Energy, land, water, air and waste: the Basque Country compared with the countries and regions of Europe.

67.2%

river water bodies in good status, Euskal Herria* (2022): the 2nd highest percentage among 28 countries

8.3 µg/m³

PM2.5 particulate matter in the air, the Basque Country (2025): the 11th lowest pollution level among 39 countries

77.7

energy intensity, Euskal Herria* (2024): the 5th lowest among 36 countries

22.3%

share of renewable energy, Euskal Herria* (2023): 22nd among 36 countries

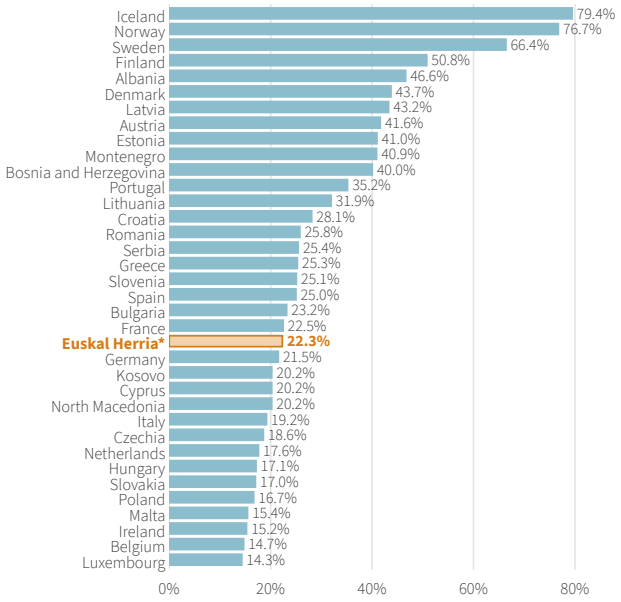
5.1 ENERGY

Energy consumption per unit of GDP is lower than in most European countries; the share of renewable energy, by contrast, is in the middle of the European range.

In 2023, renewable energy accounted for 22.3% of final energy consumption in Hego Euskal Herria: 22nd among 36 countries, on a par with France (22.5%) and Germany (21.5%). Iceland (79.4%), Norway (76.7%) and Sweden (66.4%) top the list, thanks to hydropower and biomass; Ireland, Belgium and Luxembourg are at the bottom.

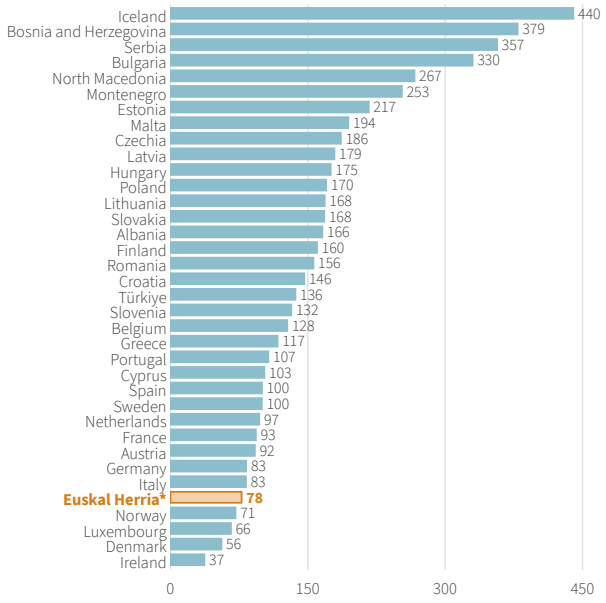
Energy intensity in Hego Euskal Herria was 77.7 toe per million euros of GDP in 2024: the 5th lowest among 36 countries, behind Ireland, Denmark, Luxembourg and Norway. Iceland, Bosnia and Herzegovina and Serbia are the most energy-intensive. The comparison is relative: the European level itself is high, and lower intensity does not mean that energy use is sustainable.

Share of renewable energy in gross final energy consumption, European countries and Euskal Herria* (%, 2023)



Note: * Euskal Herria*: Iparralde is not included in this indicator (2023). Euskal Herria*: only the overall share is available (not for electricity, heating and cooling or transport).
Source: EUSTAT, Government of Navarre (energy balances), Eurostat (SHARES). Compiled by Gaindegia.

Energy intensity, European countries and Euskal Herria* (toe per million euros of GDP, 2024)



Note: * Euskal Herria*: Iparralde is not included in this indicator (2024). Gross inland energy consumption relative to GDP. A lower value indicates greater efficiency.
Source: EUSTAT, Government of Navarre (energy balances), Eurostat. Compiled by Gaindegia.



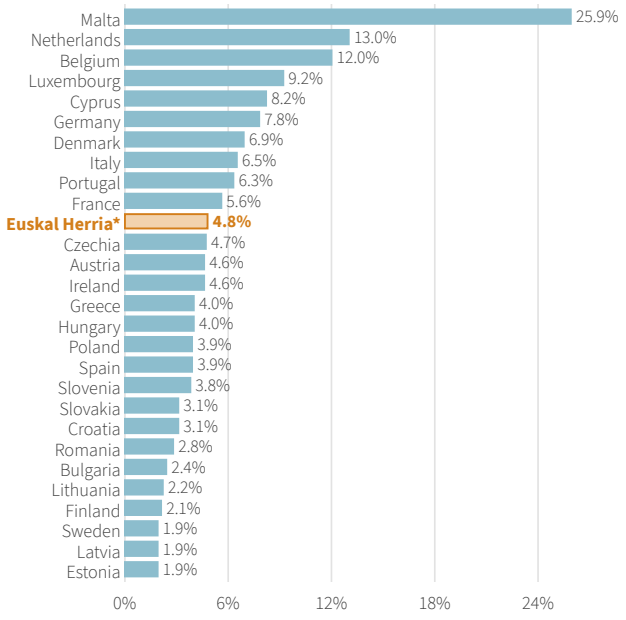
5.2
LAND, BIODIVERSITY AND WATER

The share of artificial land is in the middle of the European range, the conservation status of habitats and species in the Natura 2000 network is at the European average, and the ecological status of rivers is among the best in Europe.

In 2022, 4.8% of the land in Hego Euskal Herria was artificial: the 11th highest percentage among 28 countries, on a par with Czechia and Ireland. Malta (25.9%), the Netherlands (13%) and Belgium (12%) have the most artificial land. Among the regions, it ranks 57th out of 106.

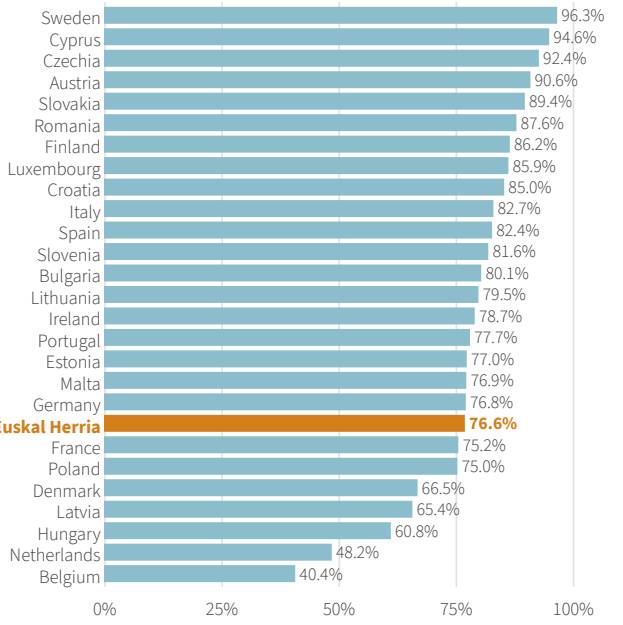
In the Natura 2000 network sites (119 sites in the Basque Country), 76.6% of the habitats and species assessed were in good or excellent conservation status in 2024: 20th among 27 countries, on a par with Germany and France. Sweden, Cyprus and Czechia top the list (over 90%), and Hungary, the Netherlands and Belgium are at the bottom.

Artificial land, European countries and Euskal Herria* (% of area, 2022)



Note: * Euskal Herria*: Iparralde is not included in this indicator (2022). Buildings, infrastructure and other sealed surfaces. LUCAS survey. The figure for Euskal Herria as a whole (CORINE mapping) is not included, as the method is different.
Source: Eurostat (LUCAS). Compiled by Gaindegia.

Natura 2000: habitats and species in good conservation status, European countries and the Basque Country (% of assessments, 2024)

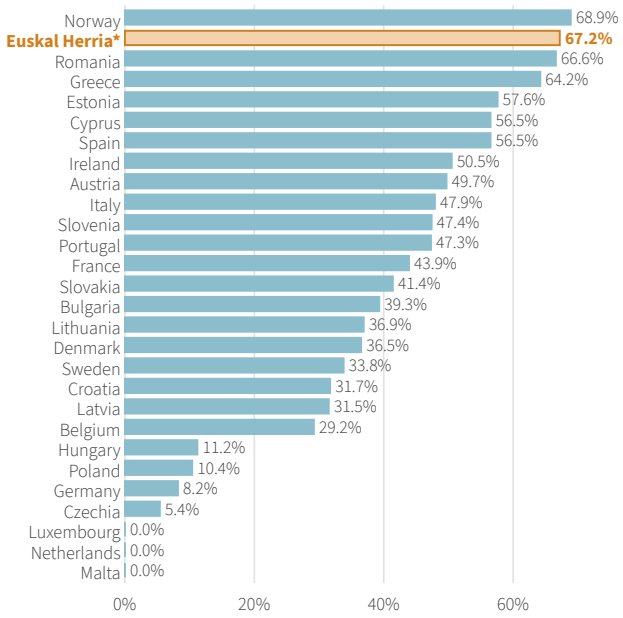


Note: Categories A and B (excellent and good), according to the assessment made at the time of designation in the sites' Standard Data Forms (SDF).
Source: EEA (Natura 2000, Standard Data Forms). Compiled by Gaindegia.

As regards water, 67.2% of the river water bodies of Hego Euskal Herria were in good ecological status in the latest planning cycle (2022): the 2nd highest percentage among 28 countries, behind Norway (68.9%) and ahead of Romania (66.6%) and Greece (64.2%). For heavily modified water bodies (ecological potential), the proportion is 40.9%, and for lakes 57.1%. In the Netherlands, Luxembourg and Czechia, by contrast, almost all river water bodies fail to achieve good status.

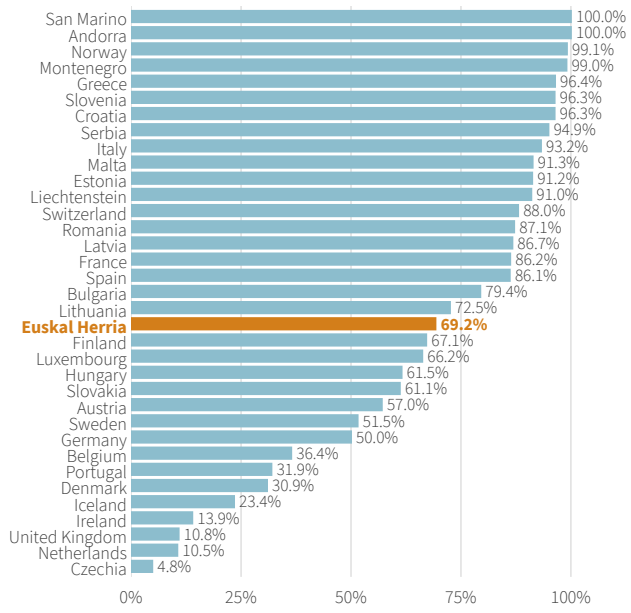
As regards forests, 69.2% of the forest area of the Basque Country was natural in 2018, and the rest plantations: 20th among 35 territories, on a par with Finland (67.1%) and Luxembourg. In France (86.2%) and Spain (86.1%) the proportion is higher, while the United Kingdom, the Netherlands (10.5%) and Czechia have the lowest.

Water bodies in good ecological status: rivers, European countries and Euskal Herria* (%, 2022 cycle)



Note: * Euskal Herria*: Iparralde is not included in this indicator (2022). Euskal Herria*: status of natural water bodies (excluding the potential of modified ones); countries: all river water bodies. They are not fully comparable.
Source: URA (Basque Government), MITECO, EEA (WISE, Water Framework Directive). Compiled by Gaindegia.

Natural forests, European countries and the Basque Country (% of forest area, 2018)



Note: Countries: naturally regenerating forest (FAO). Euskal Herria: forest of native species as opposed to plantations, based on the forest maps (own classification); the method is not the same. Euskal Herria*: 65.6% (2021).
Source: Forest maps (Basque Government, Government of Navarre, IGN-F), FAO (FRA 2020). Compiled by Gaindegia.



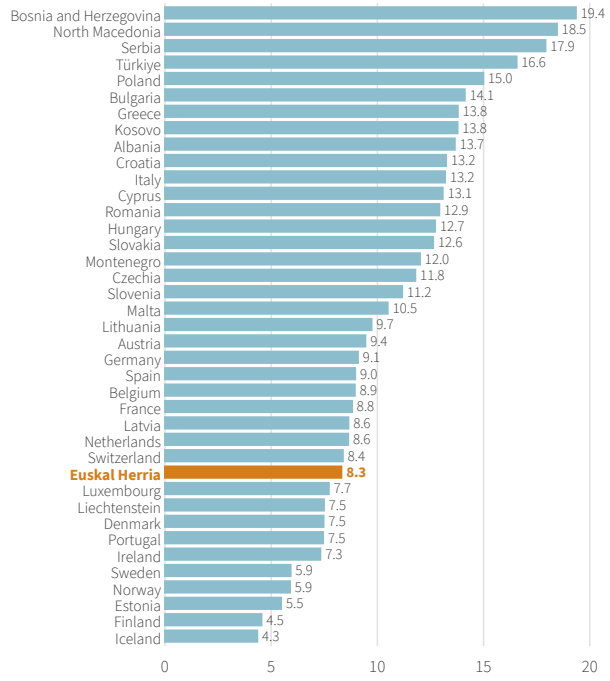
5.3
AIR QUALITY AND EMISSIONS

The air in the Basque Country is among the cleanest in Europe in terms of PM2.5 particulate matter, and the environmental impact of emissions per inhabitant is among the lowest.

In 2025, the mean concentration of PM2.5 particulate matter was 8.3 µg/m³ in Euskal Herria: the 11th lowest among 39 countries, below France (8.8) and Spain (9). Iceland, Finland and Estonia are the cleanest, and the Balkan countries and Türkiye the most polluted. The Basque Country meets the EU limit for 2030 (10 µg/m³), but is 1.7 times the WHO guideline (5 µg/m³).

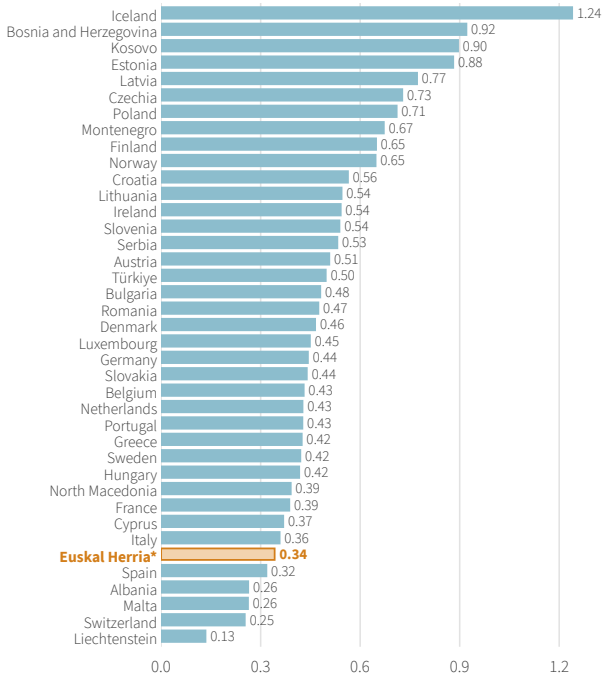
The environmental impact of anthropogenic emissions (person equivalents per inhabitant) was 0.34 in Hego Euskal Herria in 2022: the 6th lowest among 39 countries, between Spain (0.32) and Italy (0.36). Among the regions, most of the neighbouring ones have a greater impact: Castilla y León (0.64), Asturias (0.65) and Aragón (0.56), among others.

PM2.5 concentration, European countries and the Basque Country (µg/m³, population-weighted, 2025)



Note: WHO guideline: 5 µg/m³; EU limit for 2030: 10 µg/m³.
Source: Copernicus (CAMS), JRC (GHS-POP). Compiled by Gaindegia.

Environmental impact of anthropogenic emissions, European countries and Euskal Herria* (person equivalents per inhabitant, 2022)



Note: * Euskal Herria*: Iparralde is not included in this indicator (2022). Euskal Herria*: Basque Autonomous Community and Navarre (ES21 + ES22).
Source: Amalur EIS, Copernicus (CAMS 8.1). Compiled by Gaindegia.

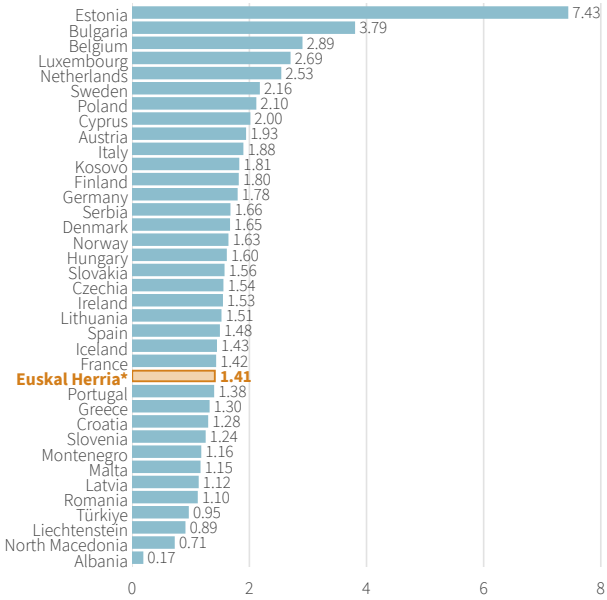
5.4
WASTE

Waste generated per inhabitant is in the middle of the European range, and the proportion collected separately is in the middle range of the countries' recycling rates.

In 2022, 1.41 tonnes of waste per inhabitant were generated in Hego Euskal Herria, excluding major mineral wastes: 25th among 37 countries, on a par with France (1.42) and Portugal (1.38). Estonia (7.43), Bulgaria (3.79) and Belgium (2.89) generate the most waste. Including mineral wastes, the figure was 2.44 tonnes per inhabitant (27th). Domestic material consumption (DMC) in the Basque Autonomous Community was 10.4 tonnes per inhabitant in 2022: the 6th lowest among 36 territories, on a par with France (10.7) and above Italy (8.9) and Spain (9).

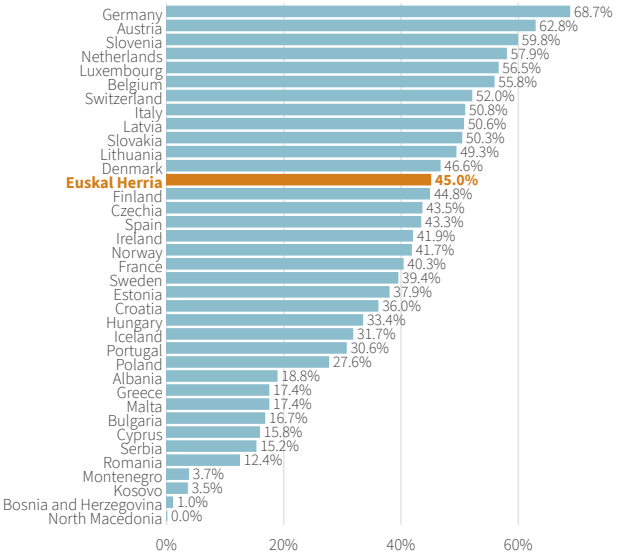
In Hego Euskal Herria, 44.8% of municipal waste was collected separately in 2023 (45% for the Basque Country as a whole, in 2020). Compared with the countries' recycling rates, it would rank 13th among 37 territories, alongside Denmark and Finland; Germany (68.7%), Austria (62.8%) and Slovenia (59.8%) top the list.

Waste generation excluding major mineral wastes, European countries and Euskal Herria* (tonnes per inhabitant, 2022)



Note: * Euskal Herria*: Iparralde is not included in this indicator (2022). Waste from all economic activities and households; excluding major mineral wastes from mining and construction.
Source: Environmental Observatory of Navarre, Basque Government, Eurostat (env_wasgen). Compiled by Gaindegia.

Recycling rate of municipal waste: actual recycling rate (countries) and separate collection (Euskal Herria), European countries and Euskal Herria (%, 2023)



Note: Euskal Herria: 2020 data (latest figure for Euskal Herria as a whole). Most recent figure for Euskal Herria* (excluding Iparralde): 44.8% (2023). Different concepts: Euskal Herria and Euskal Herria*, waste collected separately (including rejects); countries, waste actually recycled (Eurostat). The value for Euskal Herria is overestimated.
Source: Basque Government, Environmental Observatory of Navarre, Bil Ta Garbi, Eurostat (env_wasmun). Compiled by Gaindegia.

SUMMARY: THE ENVIRONMENT IN EUROPE

Energy. In Hego Euskal Herria, energy intensity is among the lowest in Europe (the 5th lowest), and the share of renewable energy (22.3%) is in the middle range.

Land and water. Artificial land (4.8%, Hego Euskal Herria) and the proportion of natural forests (69.2%, Euskal Herria) are in the middle range; the ecological status of rivers (67.2% in good status, Hego Euskal Herria) is among the best in Europe.

Air. The concentration of PM2.5 particulate matter (8.3 µg/m^3) is among the lowest in Europe, below the EU limit for 2030, but above the WHO guideline.

Waste. In Hego Euskal Herria, 1.41 tonnes of waste per inhabitant (excluding minerals) and a separate collection rate of 44.8%: both in the middle of the European range.

Main environmental indicators: value and rank of the Basque Country in Europe

Indicator (year)	Euskal Herria	Rank among countries	Rank among regions
Share of renewable energy, % (2023)*	22.3%	22 / 36	–
Energy intensity, toe per million euros of GDP (2024)*	77.7	32 / 36	–
Artificial land, % (2022)*	4.8%	11 / 28	57 / 106
Natura 2000: good conservation status, % (2024)	76.6%	20 / 27	–
Natural forests, % of forest area (2018)	69.2%	20 / 35	–
Water bodies in good ecological status: rivers, % (2022)*	67.2%	2 / 28	–
PM2.5 concentration, µg/m^3 (2025)	8.3	29 / 39	17 / 39
Environmental impact of anthropogenic emissions, person equivalents per inhabitant (2022)*	0.34	34 / 39	30 / 39
Waste generation (excluding minerals), tonnes per inhabitant (2022)*	1.41	25 / 37	–
Recycling rate of municipal waste (separate collection), % (2020)	45.0%	11 / 36	–

Note: Rank: 1 = highest value; after the slash, number of territories in the list. Rank of Euskal Herria* (excluding Iparralde) among countries, with the most recent data: Recycling rate of municipal waste (separate collection), %: 13 / 37 (2023). * Euskal Herria*: Iparralde is not included in this indicator.
Source: EUSTAT, Basque Government, Government of Navarre, Amalur EIS, Eurostat, EEA, Copernicus, FAO. Compiled by Gaindegia.

The Basque Country and neighbouring regions: air, emissions and artificial land (latest data)

Region	PM2.5 (µg/m^3, 2025)	Environmental impact of anthropogenic emissions (2022)	Artificial land (%, 2022)
La Rioja	8.8	0.35	3.7%
Euskal Herria	**8.3**	–	–
Aragón	8.2	0.56	2.6%
Midi-Pyrénées	8.0	0.39	4.2%
Aquitaine	7.7	0.40	5.3%
Cantabria	7.3	0.46	4.1%
Euskal Herria*	–	**0.34**	4.8%

Note: Euskal Herria: PM2.5; Euskal Herria*: emissions and land (excluding Iparralde).
Source: Amalur EIS, Copernicus (CAMS), Eurostat (LUCAS). Compiled by Gaindegia.

DASHBOARD: THE BASQUE COUNTRY IN EUROPE

Demography

Indicator (year)	Euskal Herria	Change	Rank among countries	Rank among regions
Population, millions (2023)	**3,200,870** 2023	▲ +0.7% 2022	25 / 37	55 / 110
Population density, inhabitants/km² (2023)	**152.9** 2023	▲ +1.1 2022	9 / 36	42 / 110
Crude birth rate, per 1,000 inhabitants (2023)	**6.4** 2023	▼ -0.2 2022	39 / 40	98 / 110
Crude death rate, per 1,000 inhabitants (2023)	**9.9** 2023	▼ -0.9 2022	21 / 40	79 / 110
Natural change, per 1,000 inhabitants (2023)	**-3.5** 2023	▲ +0.7 2022	28 / 40	65 / 110
Net migration, per 1,000 inhabitants (2024)*	**10.7*** 2024	▲ +1.0 2023	9 / 40	17 / 110
Ageing rate: women, % (2023)	**26.7%** 2023	▲ +1.8 pp 2017	2 / 37	19 / 110
Ageing rate: men, % (2023)	**21.5%** 2023	▲ +1.9 pp 2017	2 / 37	26 / 110
Population born outside the territory, % (2022)	**32.3%** 2022	–	3 / 32	–

Economy

Indicator (year)	Euskal Herria	Change	Rank among countries	Rank among regions
GDP per capita, PPS (2023)	**42,332** 2023	▲ +9.2% 2022	9 / 32	27 / 110
Share of industry, % of GVA (2023)	**24.3%** 2023	▼ -1.1 pp 2022	7 / 33	27 / 110
Share of manufacturing, % of GVA (2023)	**21.1%** 2023	▼ -0.2 pp 2022	5 / 33	20 / 110
Average size of industrial establishments, persons employed (2024)	**18.2** 2024	▲ +0.6 2023	4 / 31	20 / 107
Exports of goods, % of GDP (2023)	**36.0%** 2023	▼ -3.4 pp 2022	19 / 38	–
Trade balance, % of GDP (2024)*	**6.4%*** 2024	▼ -1.4 pp 2023	9 / 38	–
R&D expenditure, % of GDP (2024)*	**2.2*** 2024	▲ +0.1 2023	9 / 33	31 / 109
R&D personnel, % of total employment (2023)	**2.1** 2023	▲ +0.1 2022	6 / 34	19 / 109
Labour productivity, euros per hour (2023)*	**50.0*** 2023	▲ +4.8% 2022	11 / 29	–
Hourly labour cost in manufacturing, euros per hour (2023)*	**29.0*** 2023	▲ +5.2% 2022	11 / 29	–
Compensation per employee, euros per year (2023)	**45,171** 2023	▲ +4.8% 2022	11 / 30	56 / 110
Enterprise birth rate, % (2023)	**8.2** 2023	▲ +0.2 2022	23 / 27	78 / 107
Employment in cooperatives, % of employed persons (2021)	**4.9%** 2021	–	1 / 26	–
Public debt (regional governments and local authorities), % of GDP (2023)	**14.1** 2023	▼ -1.6 2022	4 / 28	–

Society

Indicator (year)	Euskal Herria	Change	Rank among countries	Rank among regions
Tertiary education, 25-64, % (2023)	**53.4%** 2023	–	2 / 35	5 / 110
Employment rate, 15-64, % (2023)	**70.6%** 2023	▲ +4.0 pp 2017	23 / 35	58 / 110

Society (continued)

Indicator (year)	Euskal Herria	Change	Rank among countries	Rank among regions
Disposable household income per capita, PPS (2021)	**20,880** 2021	▲ +7.7% 2020	4 / 28	21 / 110
Gini coefficient (2021)	**32.2** 2021	▼ -0.1 2020	13 / 35	–
At risk of poverty or social exclusion (AROPE), % (2025)*	**15.1%*** 2025	▼ -0.5 pp 2024	30 / 32	96 / 109
Annual change in consumer prices (CPI), % (2025)*	**2.9*** 2025	▼ -0.1 2024	20 / 37	–
Life satisfaction, 0-10 (2025)*	**7.35*** 2025	▼ -0.07 2024	18 / 32	–

Culture and languages

Indicator (year)	Euskal Herria	Change	Rank among countries	Rank among regions
Cultural employment, % of employment (2025)*	**3.4%*** 2025	▼ -0.3 pp 2024	30 / 35	–
Public expenditure on culture per inhabitant, euros (2023)*	**216*** 2023	▲ +23.5 2022	15 / 31	–
Knowledge of minoritised languages: Basque (%)	**36.1%*** 2021	–	6 / 14	–
Change in knowledge of minoritised languages: Basque (points)	**+4.8 pp** 2001-2021	–	1 / 14	–

Environment

Indicator (year)	Euskal Herria	Change	Rank among countries	Rank among regions
Share of renewable energy, % (2023)*	**22.3%*** 2023	▲ +2.0 pp 2022	22 / 36	–
Energy intensity, toe per million euros of GDP (2024)*	**77.7*** 2024	▼ -0.2 2023	32 / 36	–
Artificial land, % (2022)*	**4.8%*** 2022	▲ +0.1 pp 2018	11 / 28	57 / 106
Natura 2000: good conservation status, % (2024)	**76.6%** 2024	▲ +0.1 pp 2023	20 / 27	–
Natural forests, % of forest area (2018)	**69.2%** 2018	–	20 / 35	–
Water bodies in good ecological status: rivers, % (2022)*	**67.2%*** 2022	–	2 / 28	–
PM2.5 concentration, µg/m³ (2025)	**8.3** 2025	▲ +0.2 2024	29 / 39	17 / 39
Environmental impact of anthropogenic emissions, person equivalents per inhabitant (2022)*	**0.34*** 2022	▲ +0.01 2021	34 / 39	30 / 39
Waste generation (excluding minerals), tonnes per inhabitant (2022)*	**1.41*** 2022	▼ -0.16 2020	25 / 37	–
Recycling rate of municipal waste (separate collection), % (2020)	**45.0%** 2020	–	11 / 36	–

Note: Value for Euskal Herria (year in grey) and change on the previous year (for percentages, difference in percentage points; for monetary values, relative change). Rank: 1 = highest value; the dot on the line shows where Euskal Herria stands among the countries: to the left, a worse situation, and to the right, a better one, according to the direction of each indicator (for example, for the Gini coefficient or AROPE, a lower value is better); for neutral indicators (population, density, structural indicators…), the highest value is on the right. For languages, rank among minoritised languages. * Euskal Herria*: excluding Iparralde. Rank of Euskal Herria* (excluding Iparralde) among countries, with the most recent data: Population, millions: 25 / 38 (2025); Population density, inhabitants/km²: 9 / 36 (2025); Crude birth rate, per 1,000 inhabitants: 39 / 40 (2024); Crude death rate, per 1,000 inhabitants: 21 / 40 (2024); Natural change, per 1,000 inhabitants: 28 / 40 (2024); Ageing rate: women, %: 3 / 38 (2025); Ageing rate: men, %: 3 / 38 (2025); Public debt (regional governments and local authorities), % of GDP: 6 / 28 (2025); Tertiary education, 25-64, %: 2 / 35 (2025); Employment rate, 15-64, %: 20 / 35 (2025); Disposable household income per capita, PPS: 2 / 28 (2023); Gini coefficient: 19 / 35 (2024); Recycling rate of municipal waste (separate collection), %: 13 / 37 (2023).



CONCEPTUAL FRAMEWORK

CONCEPTUAL FRAMEWORK

The indicators in this report derive from the conceptual framework agreed by the Gaindegia Scientific Committee through a Delphi process.

The process. In 2025 Gaindegia renewed its indicator system together with the Scientific Committee, using the Delphi method: the experts assessed the proposals over several rounds until consensus was reached. The conceptual framework was agreed first; the indicators were then selected in accordance with it.

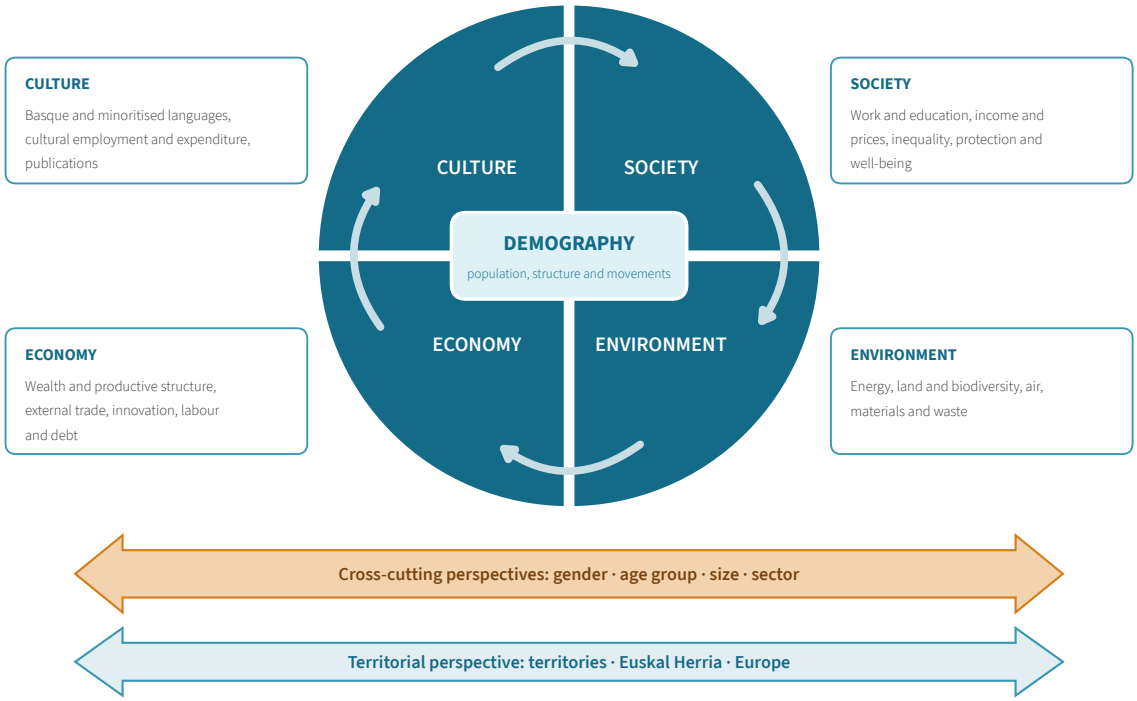
Mission. To make visible, in an integrated way, the demographic, social, economic, ecological and cultural reality of Euskal Herria, in order to represent the Basque Country as a whole and to understand its situation and development, understood as a community based on well-being, participation, cohesion and equality.

Five dimensions. The framework starts from the sustainability approach: development is balanced when the economy, society and the environment move forward without harming one another. Culture, including the Basque language, has been added to these three pillars as a dimension in its own right. Demography lies at the centre, because it is the basis of the other four: the size, structure and movements of the population influence work, care, the use of resources and the transmission of language.

Cross-cutting perspectives. All dimensions are crossed by perspectives that reveal inequalities: above all gender, but also age groups, enterprise size and economic activity sectors. For this reason, wherever possible, indicators are broken down by sex or age.

Territory. Data are given by territory and for Euskal Herria as a whole. Where there are no data for Iparralde, the gap is made explicit (Euskal Herria*), and estimates are used only when necessary, with a note. The second part places the same indicators alongside the countries and regions of Europe.

Conceptual framework of the Gaindegia indicator system



The Delphi process, step by step

1 **Conceptual framework.** Building on the workshop "Euskal Herriko ongizate adierazle sistema / Irizpideak aztergai", the mission, the framework, the dimensions and the cross-cutting perspectives were agreed.

2 **Selection of indicators.** The proposals for each dimension were assessed and the set of indicators was ratified.

3 **Data gaps.** Criteria were set for dealing with the imbalance in data between Iparralde and Hego Euskal Herria.



Workshop of the first step of the Delphi process, at the Public University of Navarre (Iruñea), 28 March 2025: "Euskal Herriko ongizate adierazle sistema / Irizpideak aztergai". More than forty experts took part, including university researchers and statisticians from public administrations.

Selected indicators, by dimension

DEMOGRAPHY

Population • Population density • Age structure • Ageing rate • Persons born outside the Basque Country • Net migration • Birth rate • Death rate • Natural change

ECONOMY

GDP per capita • Share of industry in value added • Size of industrial establishments • Net balance of enterprises • Employment in the social economy • Exports • Trade balance • R&D expenditure • R&D personnel • Labour productivity • Unit labour cost • Wages • Time devoted to care • Public debt

SOCIETY

Employment rate • Tertiary education • Disposable income • Consumer prices • Gini coefficient • At risk of poverty or social exclusion (AROPE) • Social protection expenditure • Gender Equality Index • Life satisfaction

CULTURE AND LANGUAGES

Basque speakers • Use of Basque (with work colleagues and on the street) • Cultural employment • Public expenditure on culture • Book titles in Basque • Minoritised languages in Europe

ENVIRONMENT

Energy intensity • Share of renewable energy • Renewable capacity • Artificial land • Natural forests • Natura 2000 • Status of water bodies • PM2.5 particulate matter • Environmental impact of emissions • Material consumption • Waste generation • Recycling rate

GAINDEGIA'S DATUATARIA

A tool for understanding, analysing and comparing the Basque Country through data

Data at hand to understand the reality of Euskal Herria. Gaindegia's new DatuAtaria offers a tool for analysing the social, economic and territorial reality of the Basque Country. Through data, it makes it possible to follow how Euskal Herria is developing, to analyse differences between territories and to compare the Basque Country with other regions and countries of Europe. The data in this report, and many more, will be available on DatuAtaria.

What does DatuAtaria offer?

1 Two analysis options for each indicator

Two types of analysis can be carried out with each indicator:

- **Analysis within the Basque Country:** to analyse the differences, similarities and trends among the territories of Euskal Herria.
- **Comparing Euskal Herria with Europe:** to compare the data for the Basque Country with those of other regions and countries of Europe, placing Euskal Herria in the European context.

2 Selecting data and customising the analysis

DatuAtaria allows data to be selected according to the needs of each analysis. Several criteria can be set:

- **Territories:** choose the territories to be analysed or compared.
- **Years:** select the years of interest and analyse how the data change over time.
- **Cross-cutting variables:** break down the data by sex, age group, sector or other available variables.

Thanks to these options, each analysis can be tailored to specific interests and needs.

3 Visualising the data with different chart types

Different chart types can be used to present the selected data visually:

- **Map:** to see differences between territories and the geographical distribution of the data.
- **Line chart:** to analyse trends in the indicators over time.
- **Column chart:** to compare territories, years or categories.
- **Pyramid:** to analyse the population or other indicators of a territory by sex and age group.

Once the chart type has been chosen, the data can be interpreted more clearly and the results of the analysis better understood.

4 Using interactive charts to analyse and learn

DatuAtaria's charts are interactive. Interacting with them makes it possible to analyse the information, explore the relationships between data and learn from the results.

Thanks to this interactivity, data are not just a reference resource; they are also a tool for understanding the reality of Euskal Herria in greater depth and answering new questions.

5 Downloading data and charts in multiple formats

Once the analysis is complete, DatuAtaria makes it possible to download both the selected data and the charts produced, in several formats.

The information obtained can thus be used in reports, presentations, research or other work, and the results can be shared with others.

A tool for understanding the Basque Country better

Gaindegia's new DatuAtaria makes it possible to analyse the social, economic and territorial reality of the Basque Country from a broad perspective. It allows comparisons between territories, analysis of trends over time and placing Euskal Herria in the European context.

Choose indicators, analyse data, create charts and download results.

In this way, DatuAtaria helps turn data into knowledge, to understand Euskal Herria better and to carry out new analyses of its reality.

gaindegia.eus

BOARD OF DIRECTORS AND SCIENTIFIC COMMITTEE

Board of Directors



Scientific Committee

The Scientific Committee discussed, assessed and ratified the conceptual framework and the indicators of the indicator system during the Delphi process. Anjeles Iztueta chairs the committee.



NOTES AND SOURCES

This report presents the main data on the Basque Country in two parts, with the same five sections (demography, economy, society, culture and languages, and environment): the first part describes Euskal Herria from within, territory by territory and over time; the second places it alongside the countries and regions of Europe.

Territories

Euskal Herria. The seven territories: Araba, Bizkaia, Gipuzkoa and Navarre (Hego Euskal Herria), and Lapurdi, Lower Navarre and Zuberoa (Iparralde). The Basque Autonomous Community (BAC) is made up of Araba, Bizkaia and Gipuzkoa. Population data for Euskal Herria as a whole refer to the years that coincide with the Iparralde censuses (1999, 2007, 2012, 2017 and 2023).

Euskal Herria*. The asterisk indicates that the data do not include Iparralde (Araba, Bizkaia, Gipuzkoa and Navarre), because no comparable data exist for Iparralde. It is not an estimate for Euskal Herria, but a different coverage. When a chart or table contains both figures, the title reads "Euskal Herria" and the note specifies which one carries the asterisk; in charts, maps and key figures "Euskal Herria*" is used; in the rest of the text, "Hego Euskal Herria".

Part I: Overview of the Basque Country

Sources and territorial levels. Data from official sources are used (EUSTAT, NASTAT, Basque Government, Government of Navarre, INE, INSEE and others), at municipal, district (comarca) and territory level.

Series and years. Each series runs from the first to the last year for which the source provides data. Data for Euskal Herria as a whole exist only for the years in which Iparralde sources provide data (for population, census years); for the remaining years the Euskal Herria* series is used. Any estimates and interpolations are detailed in the final notes.

Charts and maps. Each territory has a fixed colour across all sections, and Euskal Herria is highlighted in orange. In trend charts, the filled marker (●) indicates Euskal Herria as a whole, and the hollow marker (○) Euskal Herria*. On the maps, areas with no data and uninhabited common lands (facerías, parzonerías, Bardenas) are shown in grey.

Population and density. Municipal registers (INE, EUSTAT) and INSEE censuses. Territorial figures are sums of municipalities; density is calculated after aggregating population and area.

Births and deaths. EUSTAT, INE and INSEE. Rates = number / population × 1,000, after aggregating numerator and denominator. Natural change = births − deaths. For 2014-2015, the population of Iparralde is interpolated between census years.

Migration. INE Migration Statistics. Net migration = arrivals − departures; rate per 1,000 inhabitants. No annual data are available for Iparralde.

Place of birth. In Hegoalde, INE Municipal Register; no correction has been applied between the BAC and Navarre. In Iparralde, INSEE census microdata at canton level (département of birth; 85% of people born in Pyrénées-Atlantiques are considered born in the Basque Country).

Age structure and ageing. In Hegoalde, 5-year age groups (EUSTAT, INE). In Iparralde, INSEE's 7 age bands; for the pyramid, estimated in 5-year groups. The mean age is calculated from the midpoints of the age groups (85+ = 90). Ageing rate: proportion of the population aged 65 and over.

Maps. Official layers of municipal and territorial boundaries. In grey, uninhabited common lands (facerías, parzonerías, Bardenas). The colour scales come from Gaindegia's 2025 reports.

Economy: GDP, industry and exports. Eurostat (regional accounts, PPS, with national parities), EUSTAT and NASTAT. Iparralde figures are scaled from Pyrénées-Atlantiques data (INSEE FLORES, customs). Exports: goods, to other countries only.

GDP per capita, Iparralde (Gaindegia estimate). GDP is not measured for Iparralde. The départemental gross value added of Pyrénées-Atlantiques (FRI15) has been distributed by industry (Eurostat, A*10), according to the share of employment in each industry held by the municipalities of Iparralde (INSEE FLORES), and the industries have been added up. For real estate activities (L) the population share has been used, because a large part of the value added of that industry is rent imputed to owner-occupiers (1% of départemental employment, 19% of value added): it is linked to housing, not to employment. Without this correction, the value added of Iparralde would be around 5% higher. To obtain GDP, taxes on products have been distributed in the same proportion.

R&D. EUSTAT and Eurostat (NUTS 2). In Iparralde, estimate using a regional model (R&D vs. share of NACE 72 employment).

Productivity and labour costs. Eurostat, regional accounts (nama_10r_2coe, nama_10r_2emhrw, nama_10r_2gvagr, nama_10r_3gva). Unit labour cost (2015 = 100) and labour share of value added, Euskal Herria* (no data for Iparralde): sum of components, then ratio. The adjusted share imputes the labour of the self-employed. Hourly labour cost in manufacturing: in Iparralde, estimate (cost for France × INSEE wage ratio, 0.83).

Wages and care. Compensation of employees D.1 per employee (EUSTAT, Eurostat and INSEE; estimate for Iparralde); the Basque Country figure is the sum of the territories, weighted by number of employees. Methodological break between EUSTAT and Eurostat (2019/2020): see 2.4. Gender pay gap, INE Wage Structure Survey; time spent on care, EUSTAT Time Use Survey (BAC).

Social economy and enterprises. Employment in cooperatives: CIRIEC and Urssaf. Business demography: Eurostat (Euskal Herria, Navarre, Iparralde) and EUSTAT's DIRAE (territories of the BAC); the two sources are not directly comparable.

Public debt. Banco de España (autonomous communities, EDP) and Spanish Ministry of Finance (local authorities); in Iparralde, DGFiP. The Basque Country figure includes only the local debt of Iparralde.

Society: employment and education. Employment rate (15-64): Eurostat (LFS, NUTS 2), EUSTAT (CEMPA) and INSEE (census); figures for Euskal Herria as a whole refer to census years. Tertiary education (ISCED 5-8), aged 25-64: EUSTAT, Eurostat and INSEE. The indicator covers the population aged 25-64, not 25-34.

Income, prices, poverty and inequality. Disposable income: Eurostat (nama_10r_2hhinc, PPS); in Iparralde, estimate (INSEE FILOSOFI). CPI: INE. AROPE: Eurostat EU-SILC (EU 2030). Gini: INE Income Atlas; in Iparralde, INSEE FILOSOFI. The Gini series covers the whole of Hegoalde from 2021.

Protection, equality and well-being. Social protection: EUSTAT and NASTAT (ESSPROS). Gender Equality Index: EUSTAT and NASTAT, EIGE methodology; the year is the edition year (data 2-3 years older), and the methodology has been revised between editions. Euskal Herria* is the weighted mean of the BAC and Navarre; it cannot be calculated for Euskal Herria as a whole. Life satisfaction: EUSTAT and INE.

Culture and languages: knowledge. 2021 censuses, population aged over 5. Euskal Herria* = BAC + Navarre (aggregated figures); no comparable data exist for Iparralde, as the French census does not include language questions. The district map has been produced by aggregating municipal figures.

Use. With work colleagues: Sociolinguistic Survey (1991-2021), employed persons aged over 16; of the Iparralde series, only 2021 has been used. On the street: Soziolinguistika Klusterra's Street Language Use Survey (1989-2021).

Culture. Cultural employment and outturn expenditure (regional governments and municipalities): Spanish Ministry of Culture (CULTURAbase). Titles in Basque: J. M. Torrealdai; for 2000-2004 there is no breakdown by format.

Environment: energy. Energy intensity and share of renewables: EUSTAT and the energy balance of Navarre; Euskal Herria* weighted by GDP and consumption. Installed capacity: REE. No data for Iparralde.

Land and biodiversity. Natural forests: forest maps, own classification. Artificial land: CORINE Land Cover (2006, 2012, 2018). Natura 2000: Standard Data Forms (assessments at the time of designation; few cases in the small territories). Water bodies: URA (BAC series) and MITECO/WISE (2022 comparison); the two sources do not match.

Air, materials and waste. PM2.5: EEA grid, weighted by population. IAI: CAMS 8.0 inventory, WENFI weighting (Amalur EIS). Recycling: separate collection, including rejects. DMC: BAC only.

Part II: the Basque Country in Europe

Two levels of comparison. For each indicator, Euskal Herria is placed in two lists: that of European countries (between 30 and 40, depending on the indicator) and that of European regions (around 130; at NUTS 1 or NUTS 2 level, whichever is comparable in size to the Basque Country in each country). In the rankings, 1st place corresponds to the territory with the highest value.

Reference year and Euskal Herria*. For each indicator the latest year with available data is used, giving priority to data for Euskal Herria as a whole. Where Euskal Herria* (with an asterisk) is written, Iparralde is not included in that indicator. Where the Euskal Herria* figure refers to a more recent year, this is stated in the text; in trend charts both series are on the same line, with a filled marker (Euskal Herria) and a hollow one (Euskal Herria*).

Figures for countries and regions. The figures for the Spanish and French states also include the territories of Euskal Herria. In the list of regions, by contrast, the unit is the Basque Country itself: the Basque Autonomous Community and Navarre do not appear separately, and the figures for Aquitaine (the pre-2016 region) include Iparralde.

Year. For each indicator, the latest year with data available for the European comparison. Wherever possible, the charts show the figure for Euskal Herria as a whole, even if it refers to a different year; if a more recent Euskal Herria* figure exists, it is given in the chart note. The summary tables and the dashboard use the figure for Euskal Herria as a whole if it lags no more than 3 years behind the Euskal Herria* figure; the ranks in the texts refer to the main year.

Part II: comparison framework. Countries: European countries with Eurostat data (between 30 and 40, depending on the indicator). Regions: NUTS 1 or NUTS 2 units of the European Union, comparable in size to Euskal Herria in each country (in France, the pre-2016 regions; in Spain, the autonomous communities); regions outside the EU (Türkiye, United Kingdom, Norway, Switzerland, some Balkan countries…) are not compared and appear in light grey on the maps. The number of regions varies by indicator and year, depending on data availability. Euskal Herria is included as one more territory in both lists, and the Basque Autonomous Community and Navarre do not appear separately.

Demography in Europe. Population on 1 January. Ageing rate (% aged over 65): for countries and regions it is only available by sex, and is therefore compared by sex. Net migration: Eurostat crude rate of net migration; for Euskal Herria*, sum of municipal balances. Population born outside the territory: for the countries, percentage of people not born in the country of residence; for Euskal Herria, percentage of people born outside Euskal Herria (the same figure as in Part I). Density: inhabitants per km^2; for Euskal Herria, sum of the population and area of the municipalities (Part I data). Net migration: Euskal Herria* only (the only figure for Euskal Herria as a whole is a period average, not annual).

The economy in Europe. GDP per capita: in purchasing power standards (PPS). Industry: NACE sections B-E; manufacturing: section C. Exports: for Euskal Herria, customs data (goods). Trade balance: for Euskal Herria*, with other countries only. Productivity and compensation: in current euros. Care: data for the Basque Autonomous Community. Size of industrial establishments (E1): persons employed per establishment. Public debt: debt of the regional governments and local authorities, % of GDP; only data for the most recent years are used, because in the series of many countries earlier years are not comparable.

Society in Europe. Tertiary education and employment: EU-LFS (Labour Force Survey); for Euskal Herria, Iparralde data from the census. Income: disposable household income per capita, in purchasing power standards (PPS). AROPE: at-risk-of-poverty or social exclusion rate (EU 2030 definition). Prices: annual change (%); the index bases are not comparable. Gender Equality Index: EIGE methodology; for Euskal Herria*, Eustat / Emakunde and NASTAT, weighted by population; the latest figure for Euskal Herria* is for 2020, and that for the countries from EIGE's 2025 edition.

Culture in Europe. Employment and expenditure on culture: for Euskal Herria*, CULTURABase of the Spanish Ministry of Culture (Labour Force Survey; outturn expenditure of the autonomous communities and local authorities); for countries and regions, Eurostat (cultural employment; COFOG 08.2). The methodologies are not the same, and the ranks of Euskal Herria* are indicative. Regions: 2024 data; no data for the Spanish autonomous communities. Minoritised languages: knowledge indicators and periods depend on each language. Basque: knowledge, 2021 population censuses (EUSTAT, NASTAT; Euskal Herria*, aged 5 and over), the same figure as in Part I; change and use, Basque Government (7th Sociolinguistic Survey; Euskal Herria as a whole, aged 16 and over).

The environment in Europe. Renewables: in gross final energy consumption (SHARES). Artificial land: LUCAS survey (the figure for Euskal Herria as a whole, from CORINE mapping, is not compared). Natura 2000: assessments in the sites' Standard Data Forms (A+B). Water: latest planning cycle of the Water Framework Directive. PM2.5: annual mean weighted by population. Energy intensity: gross inland energy consumption (toe) per million euros of GDP. Environmental impact of anthropogenic emissions: Amalur EIS (CAMS 8.1); Euskal Herria* = Basque Autonomous Community + Navarre (ES21 + ES22). Waste: excluding major mineral wastes (criterion of Eurostat's sustainable development indicator 12.50). Recycling: for the countries, waste actually recycled; for Euskal Herria, waste collected separately, including rejects (mixed sources), and therefore overestimated. Domestic material consumption (DMC): Basque Autonomous Community only (Basque Government, material flow statistics), compared with countries for the same year (Eurostat). Natural forests: for the countries, FAO naturally regenerating forest; for Euskal Herria, forest of native species from the forest maps (own classification).

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