



Grupo Vasco

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**"Talento y territorio un desafío  
de la globalización.  
Davos y la competitividad  
de las ciudades y países por el Talento"**

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D. Ivan Jiménez Aira

3 de febrero de 2017



 **Bizkaia**  
*talent*



Bilbao  
Bizkaia



**BE BASQUE TALENT NETWORK**  
by bizkaia::talent



“We recruit, engage and retain talent in the area of Bilbao-Bizkaia, Basque Country”

“TALENTO Y TERRITORIO UN DESAFIO DE LA GLOBALIZACION”  
DAVOS Y LA COMPETITIVIDAD DE LAS CIUDADES Y PAISES POR EL  
TALENTO

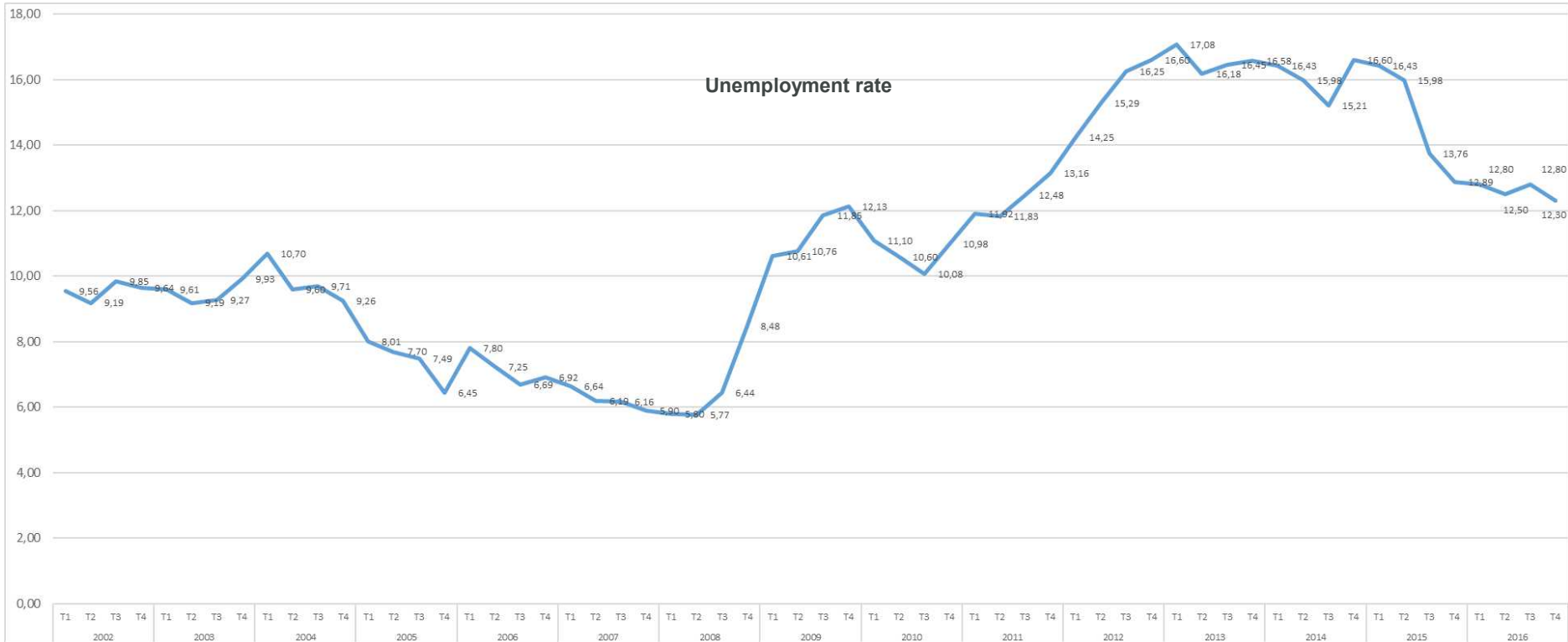


IVAN JIMENEZ AIRA  
Managing Director  
ivan.jimenez@bizkaiatalent.eus  
BILBAO 2017/02/03

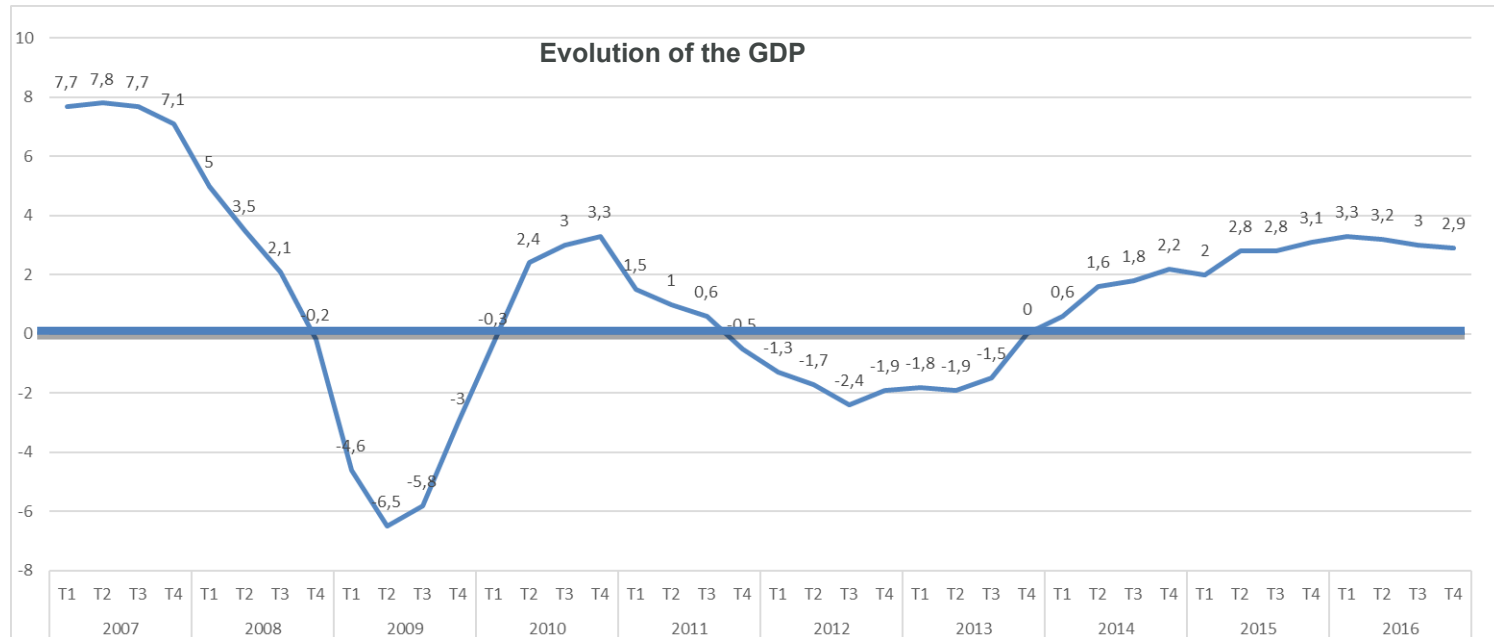


# Economic situation

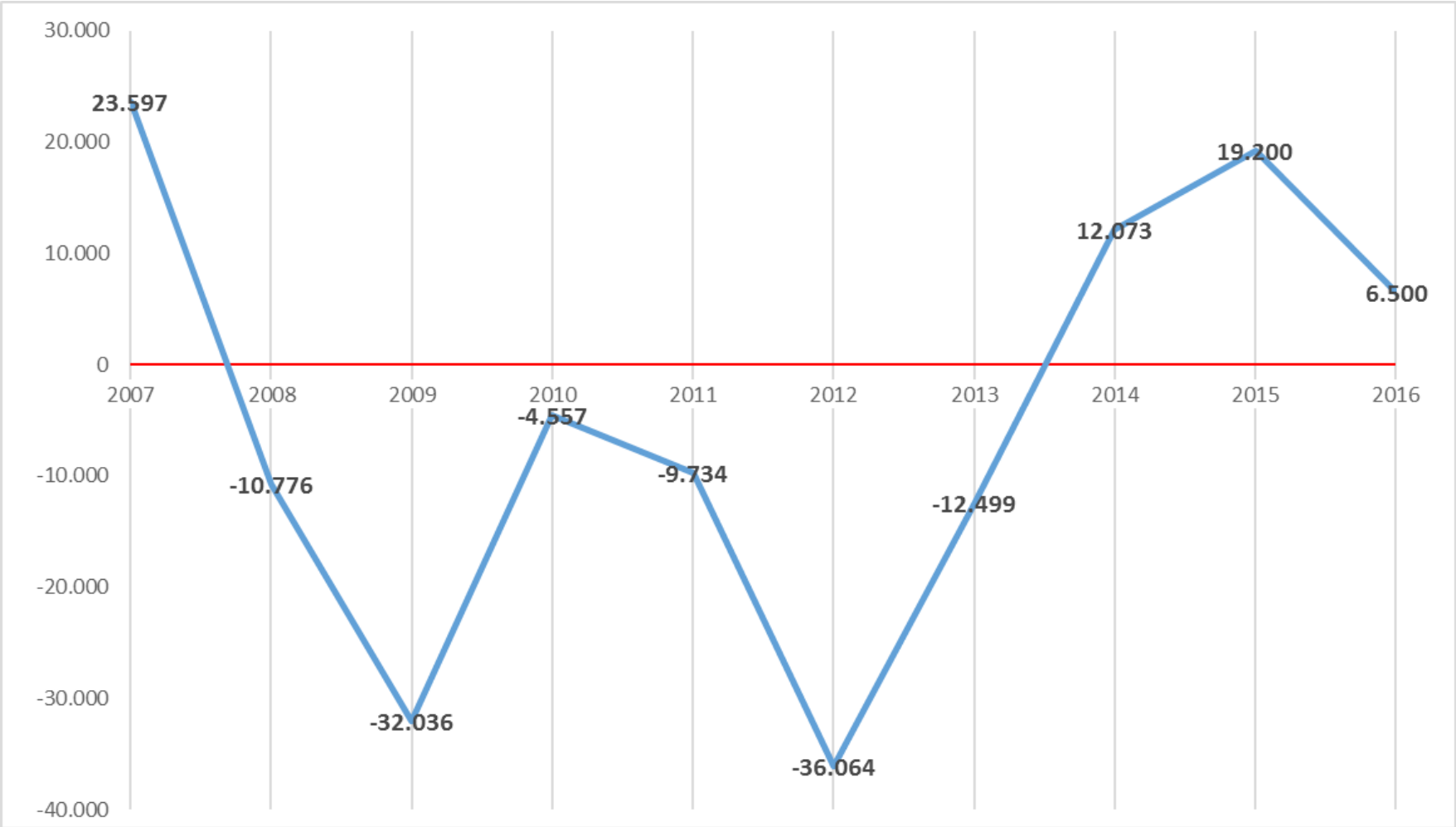
Unemployment rate



## Economic forecast



# EVOLUTION OF SOCIAL SECURITY AFFILIATION IN THE BASQUE AUTONOMOUS COMMUNITY



Source: Lanbide

Last update: 2017



## GRANDES RETOS

ENVEJECIMIENTO DE LA POBLACIÓN

TAMAÑO DE LAS EMPRESAS

PERDIDA DE CENTROS DE DECISION Y  
CONCENTRACION DE LOS MISMOS EN  
POCOS LUGARES

MUSCULO FINANCIERO DEBIL

ADAPTACION A LAS NUEVAS NECESIDADES Y  
VALORES DE LOS PROFESIONALES

# CHALLENGES&SOME SOLUTIONS

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## PARTE DE LA SOLUCION

NO A LA AUTOCOMPLACENCIA

FORMACION CONTINUA DE LA POBLACION Y  
(RE)ATRACCION DE TALENTO

ALIANZAS EMPRESARIALES DE COMPAÑIAS DE  
UN MISMO SECTOR O COMPLEMENTARIOS

INVERSION Y PARTICIPACION DE LOS AGENTES  
FINANCIEROS EN LAS ORGANIZACIONES

MODELOS FLEXIBLES Y DE  
CORRESPONSABILIDAD EN LAS  
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**PARA PODER MEJORAR EN :**  
**1- INTERNACIONALIZACIÓN**  
**2-INNOVACION**  
**3-PRODUCTIVIDAD**  
**4-COMPETITIVIDAD.**



# CHALLENGES&SOME SOLUTIONS

## GRANDES RETOS

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**1- INTERNACIONALIZACIÓN**

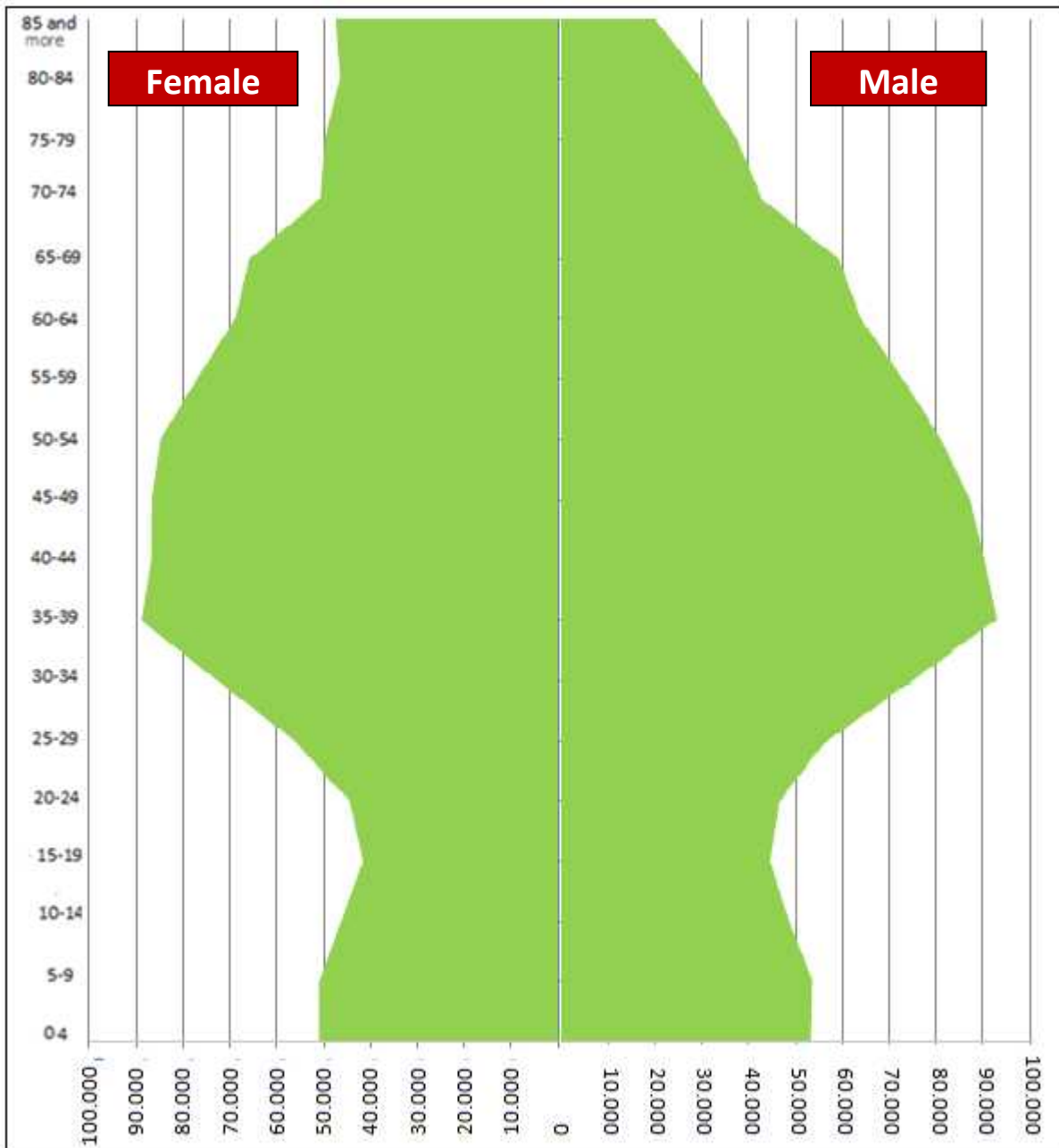
**2-INNOVACION**

**3-PRODUCTIVIDAD**

**4-COMPETITIVIDAD.**

**OBJETIVO FINAL:**

**CREAR UNA SOCIEDAD SOSTENIBLEMENTE  
PROSPERA PARA TODOS SUS CIUDADANOS**

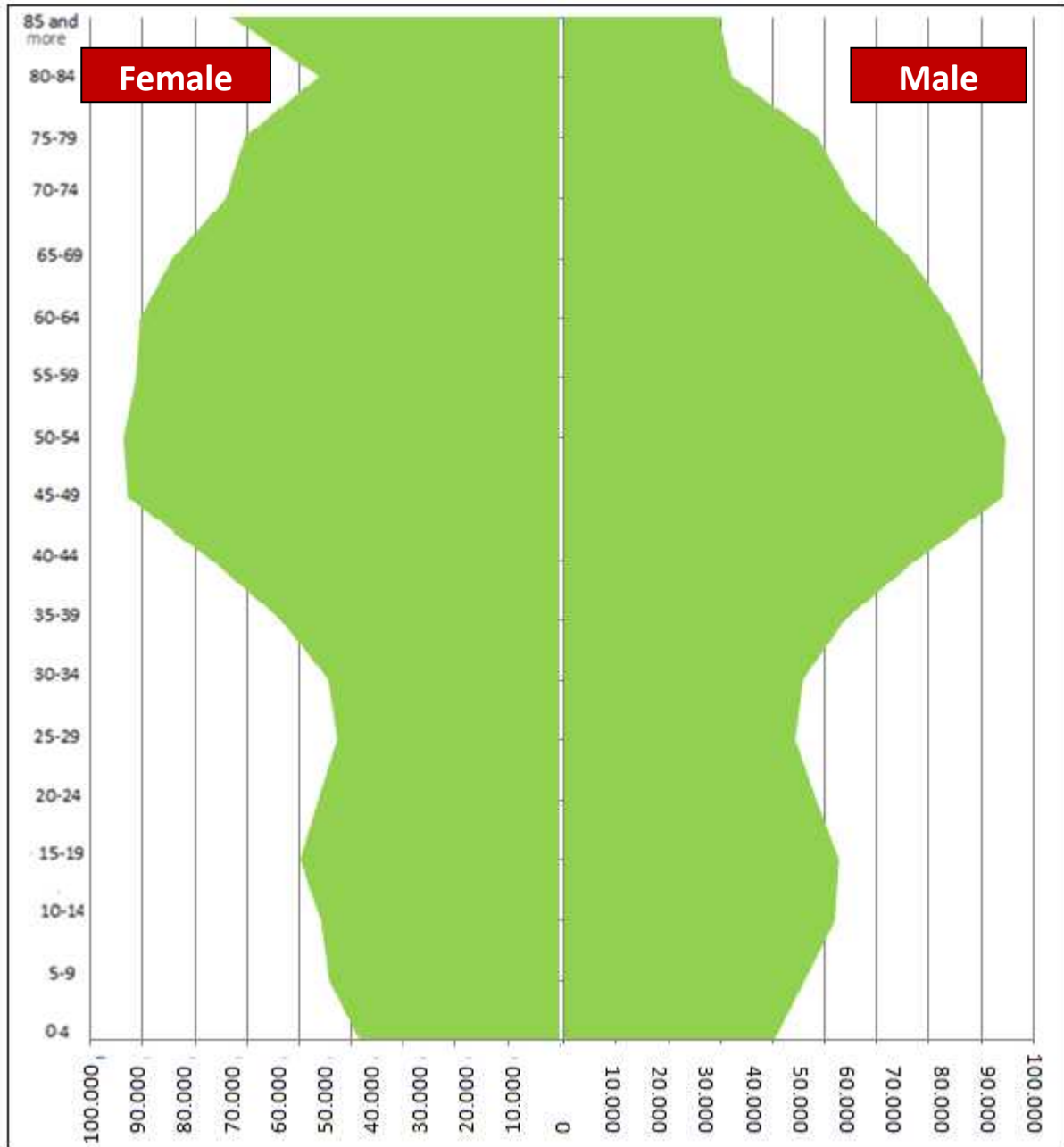


Male	2014
0 - 4	53.400
5 - 9	53.700
10 - 14	48.900
15 - 19	44.700
20 - 24	46.700
25 - 29	57.200
30 - 34	75.100
35 - 39	93.200
40 - 44	90.500
45 - 49	87.500
50 - 54	81.400
55 - 59	73.100
60 - 64	64.400
65 - 69	59.300
70 - 74	42.900
75 - 79	37.400
80 - 84	30.000
85 and more	20.000
<b>Total</b>	<b>1.059.400</b>

Female	2014
0 - 4	51.000
5 - 9	51.000
10 - 14	46.300
15 - 19	41.600
20 - 24	44.500
25 - 29	56.000
30 - 34	72.600
35 - 39	88.900
40 - 44	86.800
45 - 49	86.700
50 - 54	84.800
55 - 59	77.000
60 - 64	68.800
65 - 69	65.900
70 - 74	50.700
75 - 79	49.700
80 - 84	46.500
85 and more	47.500
<b>Total</b>	<b>1.116.300</b>

Source: EUSTAT

Last update: 2014

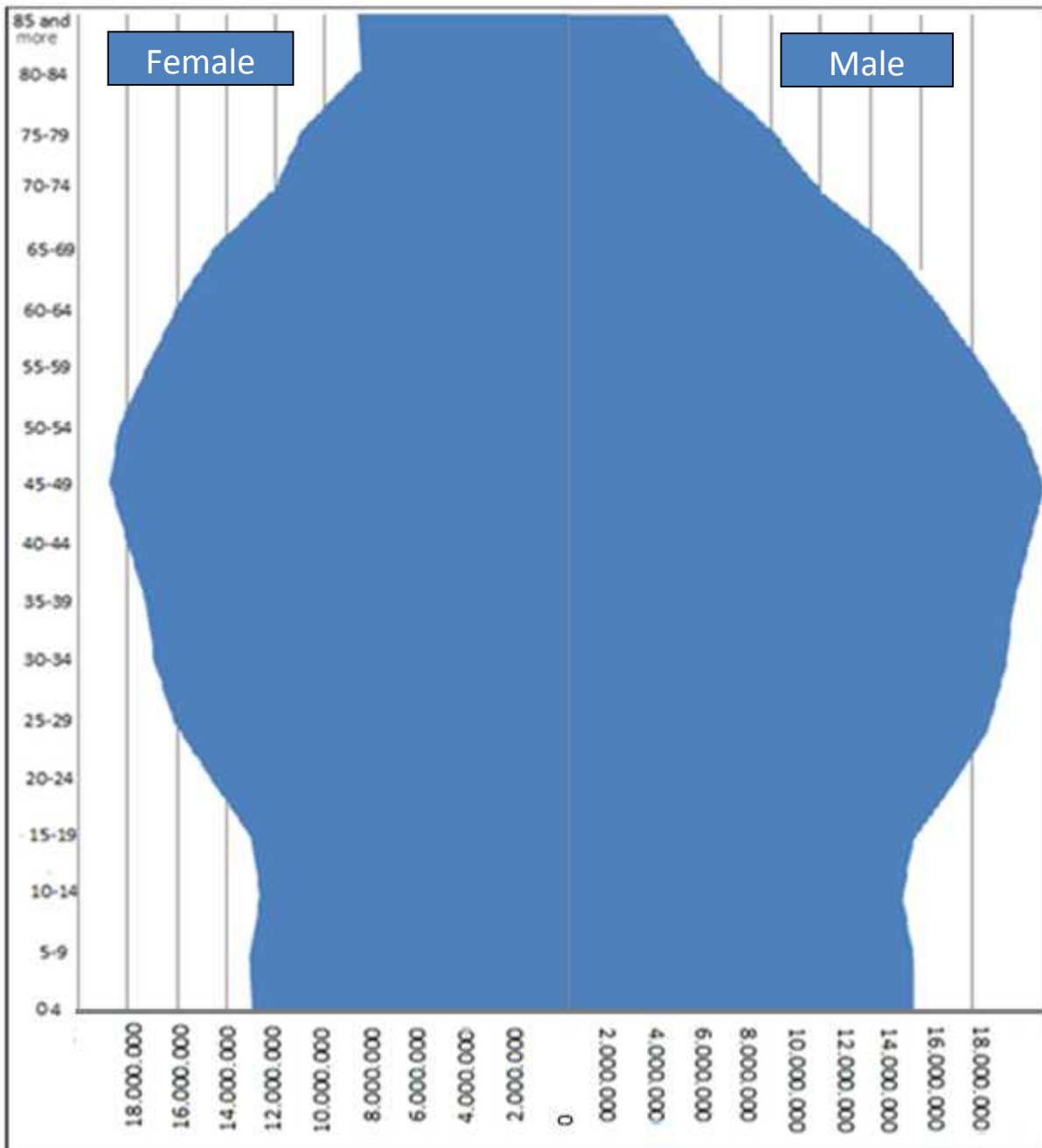


Male	2025
0 - 4	40.300
5 - 9	46.200
10 - 14	52.000
15 - 19	52.800
20 - 24	48.400
25 - 29	44.400
30 - 34	45.900
35 - 39	54.000
40 - 44	67.800
45 - 49	84.300
50 - 54	84.800
55 - 59	80.100
60 - 64	74.400
65 - 69	66.500
70 - 74	55.100
75 - 79	48.600
80 - 84	32.200
85 and more	29.700
<b>Total</b>	<b>1.007.500</b>

Female	2025
0 - 4	38.400
5 - 9	44.300
10 - 14	45.900
15 - 19	49.900
20 - 24	46.400
25 - 29	42.800
30 - 34	44.500
35 - 39	53.700
40 - 44	67.100
45 - 49	83.100
50 - 54	83.900
55 - 59	81.500
60 - 64	80.700
65 - 69	74.500
70 - 74	64.200
75 - 79	60.500
80 - 84	46.300
85 and more	63.300
<b>Total</b>	<b>1.071.000</b>

Source: EUSTAT

Last update: 2014

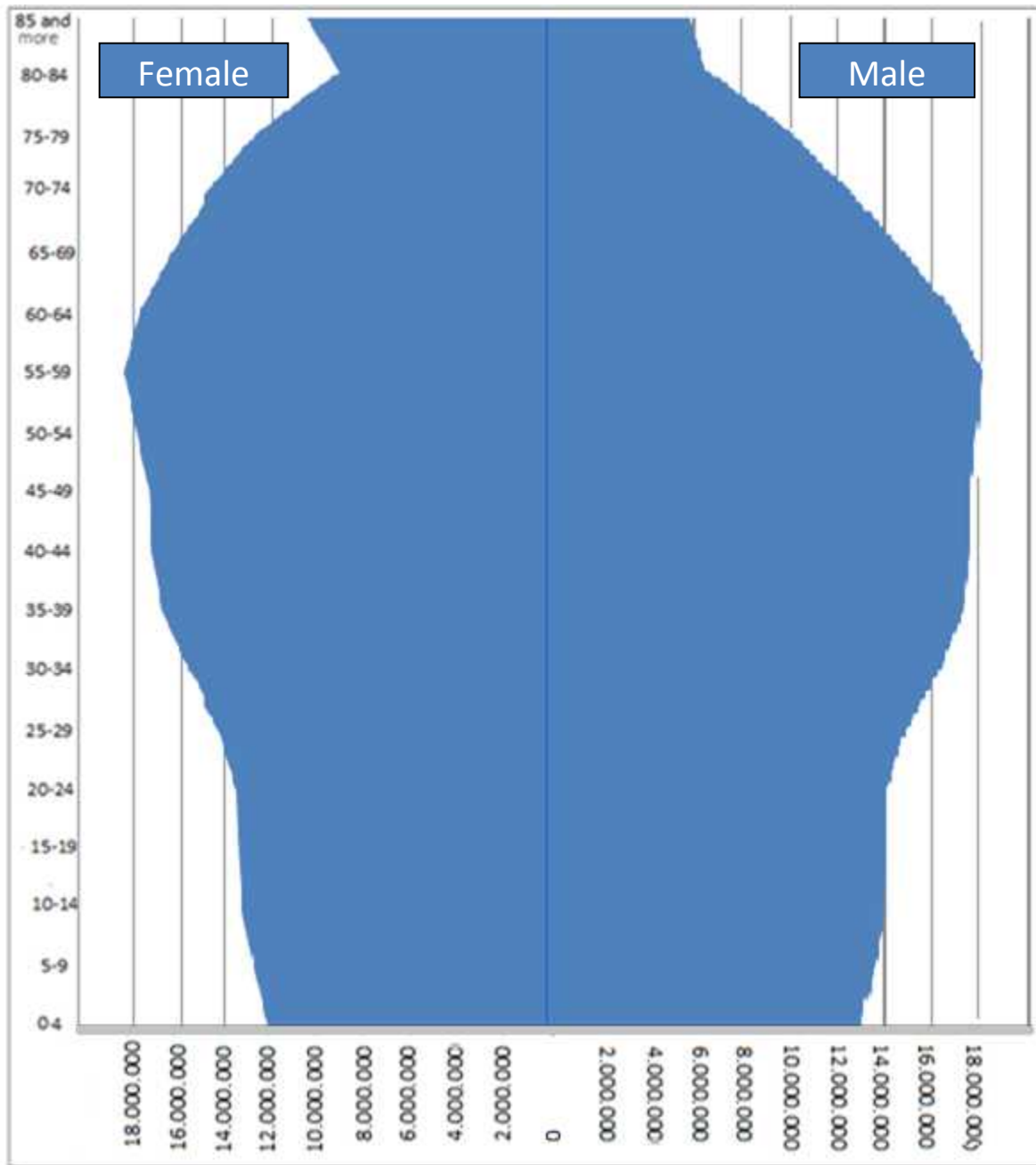


Female		2015	
1 - 4		12.926.565	
5 - 9		13.029.320	
10 - 14		12.614.648	
15 - 19		12.986.892	
20 - 24		14.641.473	
25 - 29		16.195.730	
30 - 34		16.956.686	
35 - 39		17.298.553	
40 - 44		18.040.231	
45 - 49		18.792.175	
50 - 54		18.366.161	
55 - 59		17.244.461	
60 - 64		16.033.671	
65 - 69		14.491.579	
70 - 74		14.029.508	
75 - 79		10.926.887	
80 - 84		8.497.249	
85 and more		8.611.408	
<b>Total</b>		<b>261.683.197</b>	
Male		2015	
1 - 4		13.704.362	
5 - 9		13.698.649	
10 - 14		13.267.228	
15 - 19		13.649.458	
20 - 24		15.292.491	
25 - 29		16.771.985	
30 - 34		17.400.789	
35 - 39		17.707.134	
40 - 44		18.286.708	
45 - 49		18.906.722	
50 - 54		18.078.782	
55 - 59		16.478.713	
60 - 64		14.779.315	
65 - 69		12.906.152	
70 - 74		10.028.836	
75 - 79		8.171.182	
80 - 84		5.438.415	
85 and more		3.984.572	
<b>Total</b>		<b>248.551.493</b>	

Source: EUROSTAT

Last update: 2012

# Projections Demographic to 2025 in the European Union



Female 2025	
1 - 4	12.193.253
5 - 9	12.782.573
10 - 14	13.256.806
15 - 19	13.410.927
20 - 24	13.505.271
25 - 29	14.264.774
30 - 34	15.670.021
35 - 39	16.824.270
40 - 44	17.280.542
45 - 49	17.396.360
50 - 54	17.929.563
55 - 59	18.459.451
60 - 64	17.802.227
65 - 69	16.394.524
70 - 74	14.783.985
75 - 79	12.641.863
80 - 84	9.262.813
85 and more	10.688.312
<b>Total</b>	<b>264.547.535</b>

Male 2025	
1 - 4	12.932.755
5 - 9	13.539.059
10 - 14	14.022.399
15 - 19	14.067.993
20 - 24	14.074.112
25 - 29	14.854.584
30 - 34	16.302.206
35 - 39	17.332.123
40 - 44	17.604.791
45 - 49	17.615.596
50 - 54	17.881.941
55 - 59	18.114.059
60 - 64	16.862.300
65 - 69	14.761.477
70 - 74	12.492.891
75 - 79	9.962.905
80 - 84	6.473.074
85 and more	5.668.303
<b>Total</b>	<b>254.562.568</b>

Source: EUROSTAT

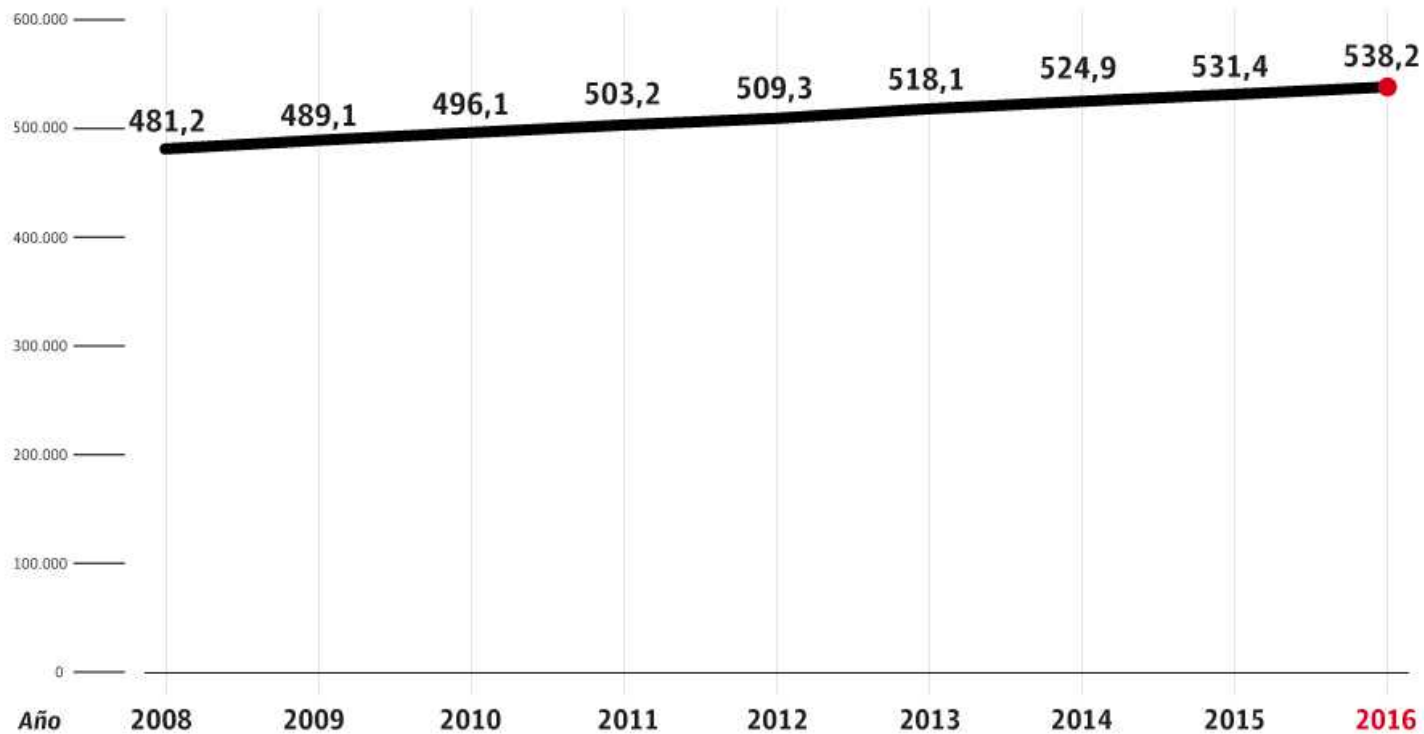
Last update: 2012

## PENSIONES

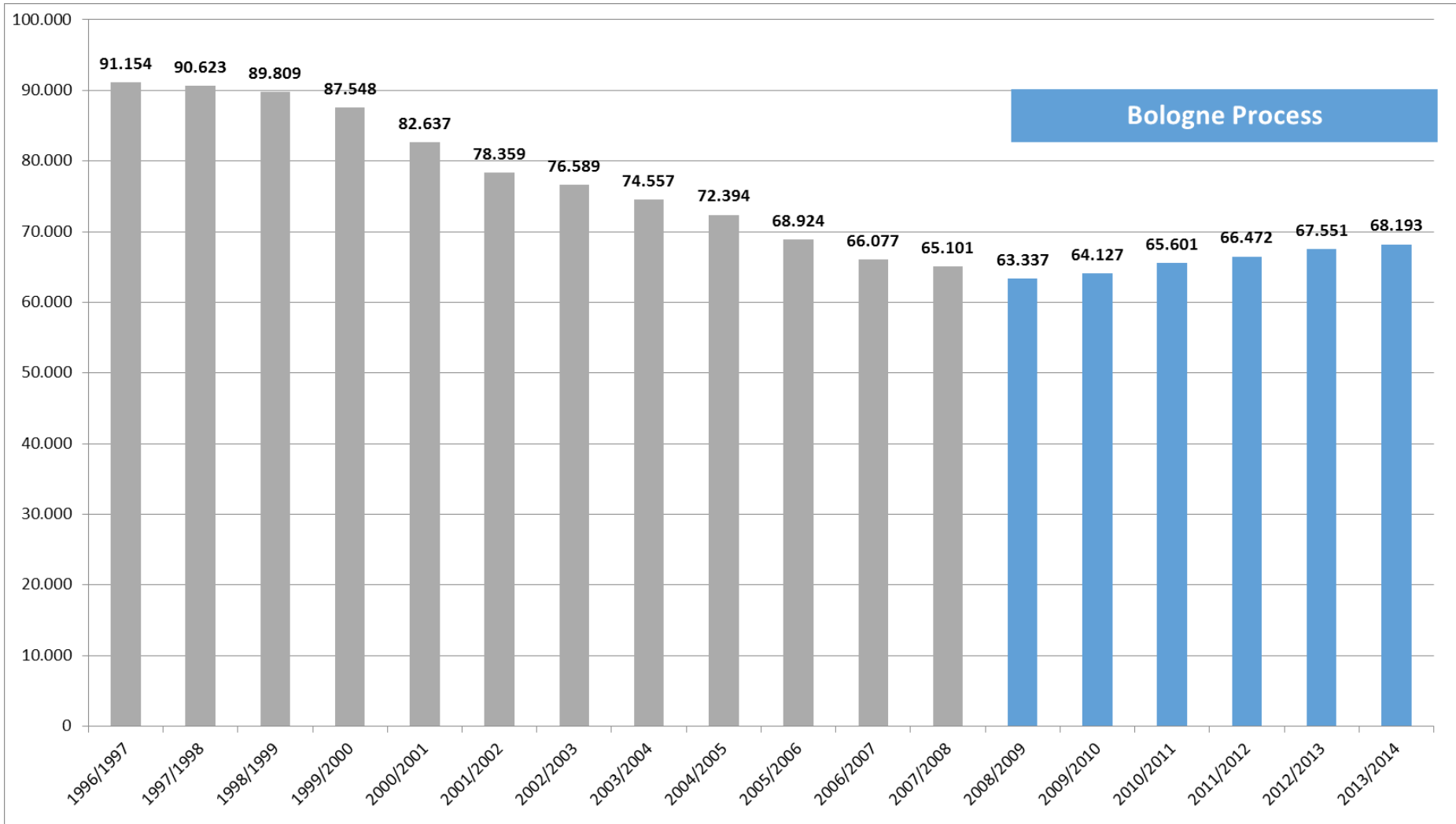
### Las cifras del sistema de pensiones

Datos de septiembre de cada año

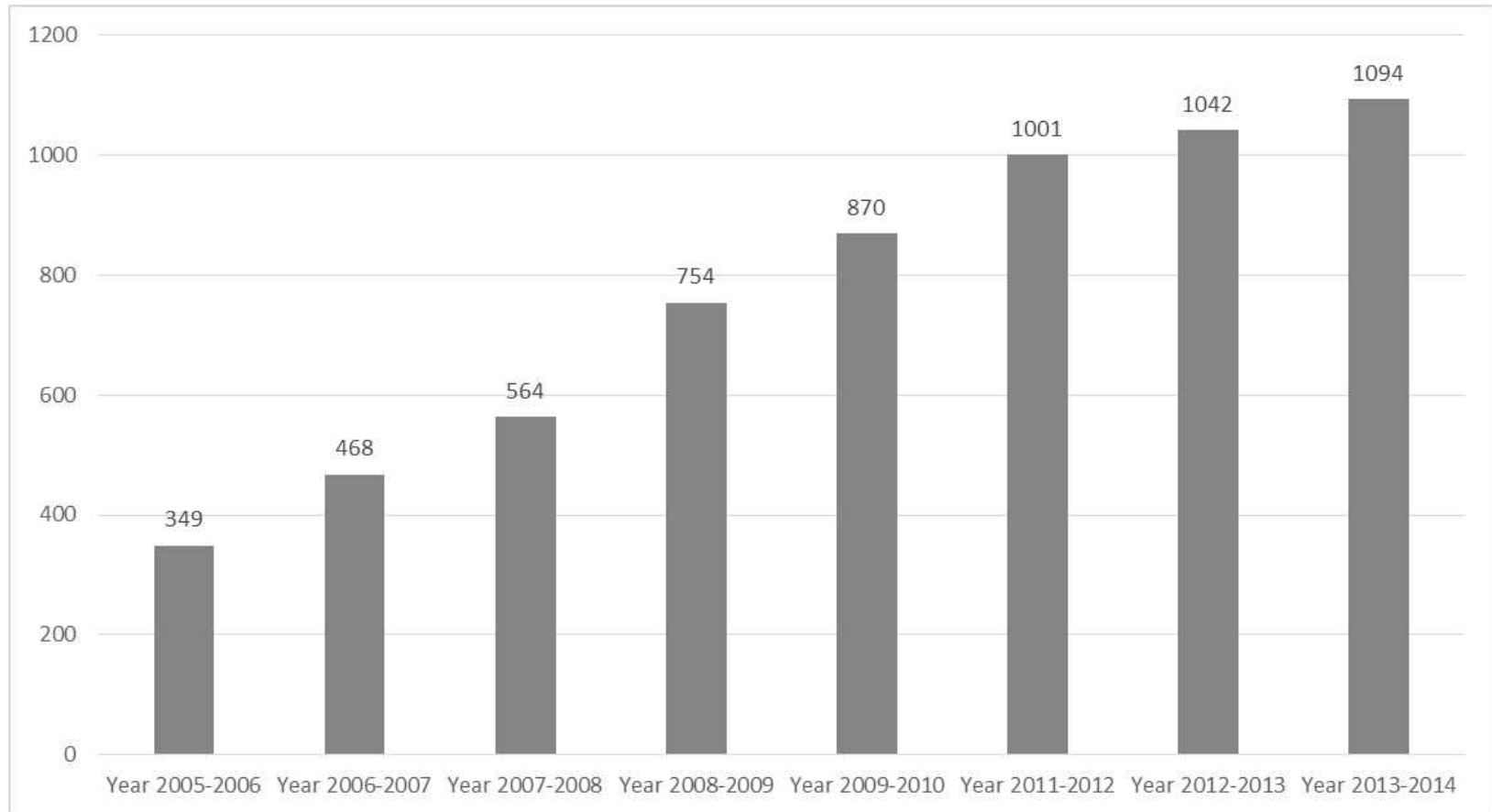
#### Número de prestaciones (miles)



# Registrations in Basque universities in the last ten years

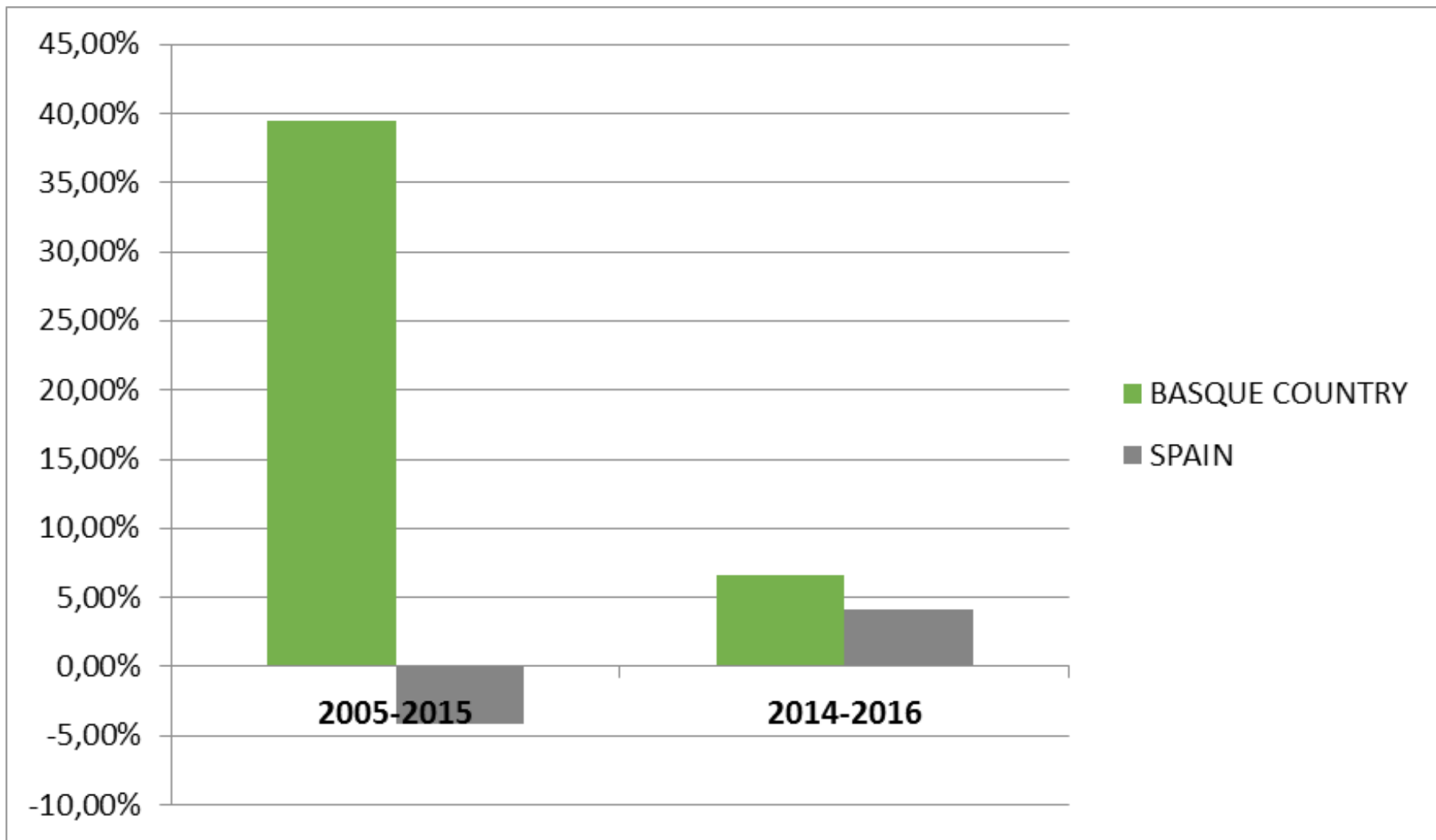


# Evolution of the last 10 years of the number of foreign students in the Basque University

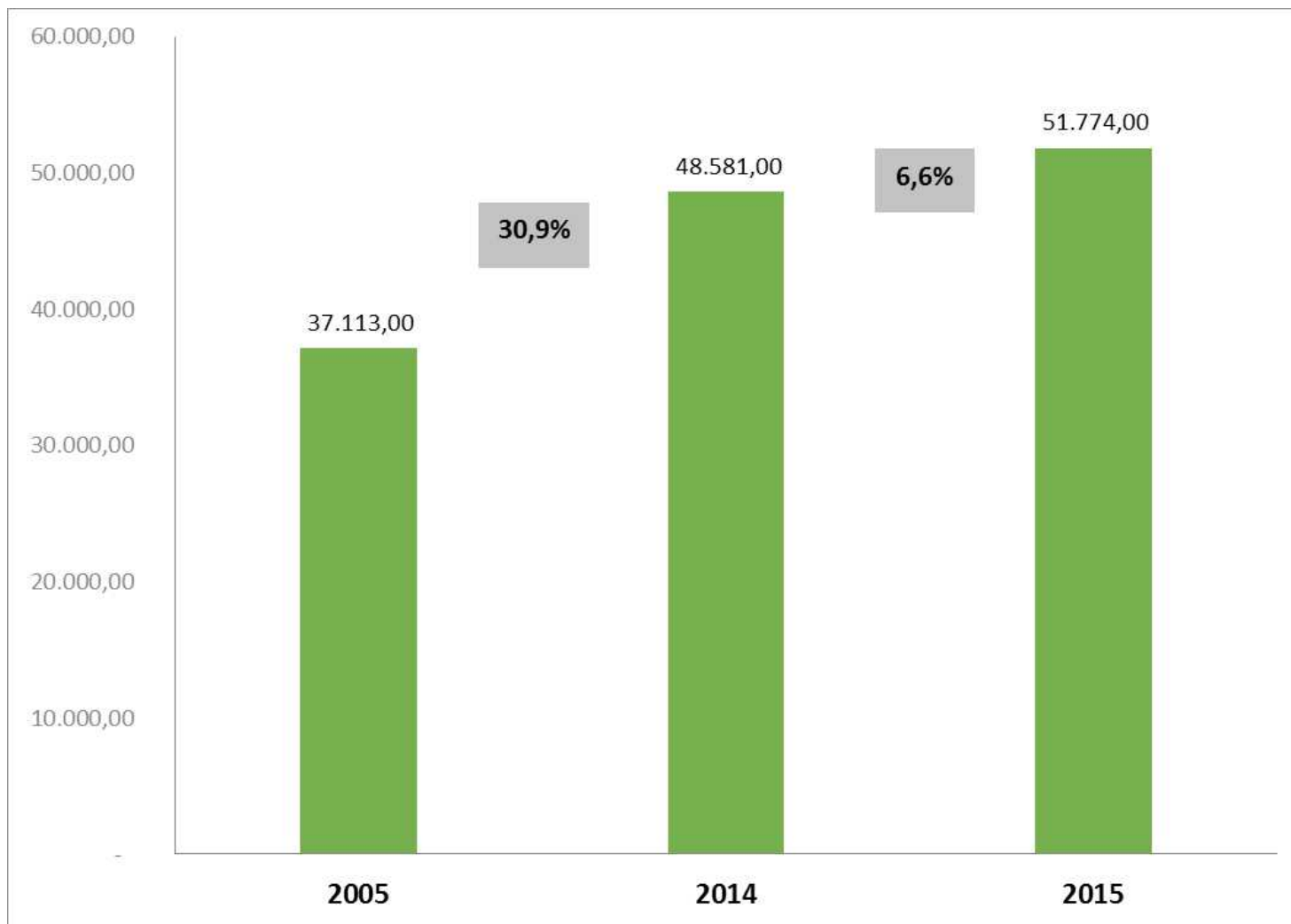




# BASQUE COUNTRY-SPAIN COMPARISON WITH REGARD TO THE EVOLUTION OF PERCENTAGE OF FOREIGNER WORKERS



# EVOLUTION OF NUMBER OF FOREIGNER WORKERS 2005-2014 IN BASQUE COUNTRY WITH PERCENTAGE JUMPS



# MIDDLE CLASS FORECAST

Numbers (millions) and Share (percent) of the Global Middle Class

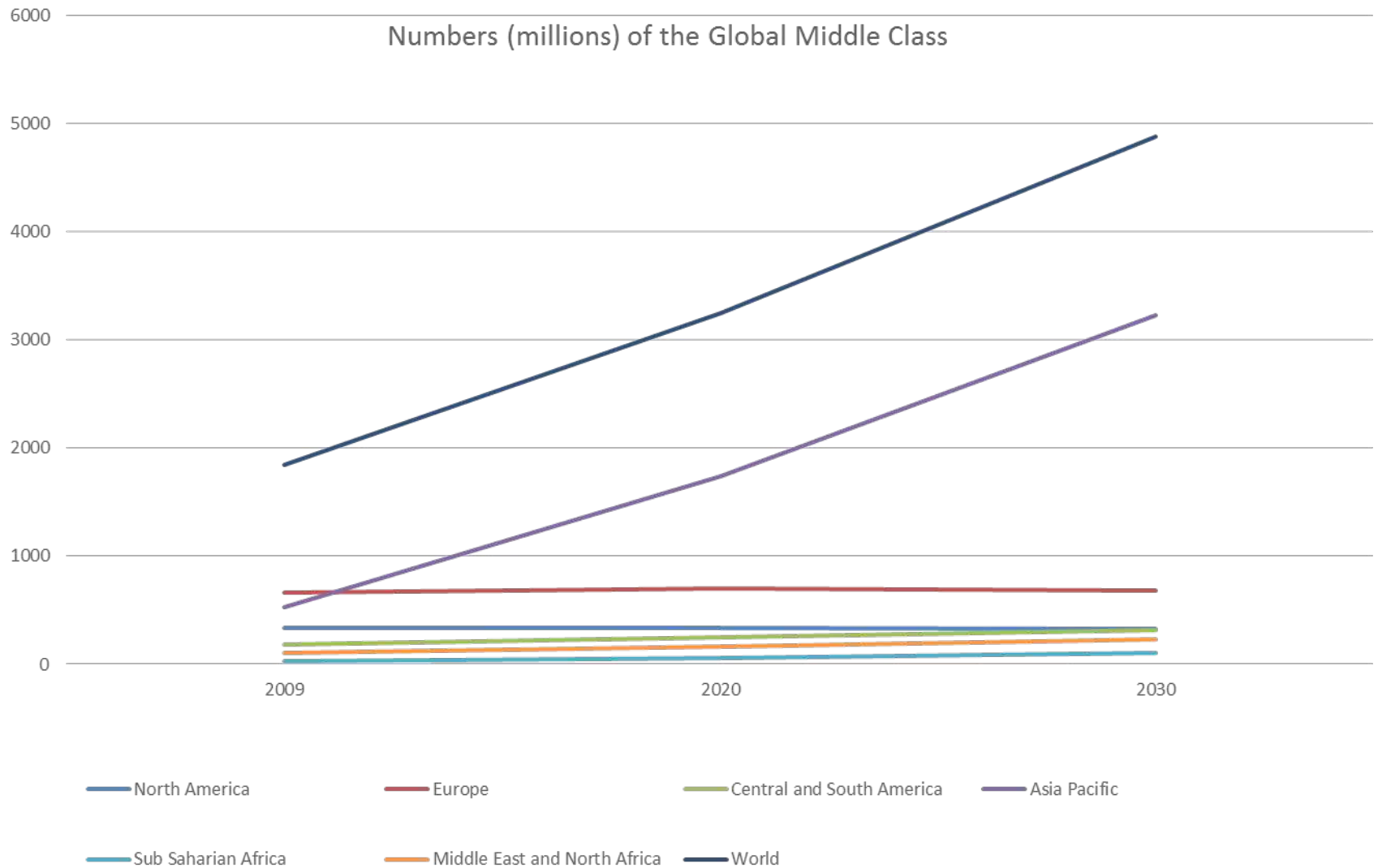
	2009		2020		2030	
North America	338	18%	333	10%	322	7%
Europe	664	36%	703	22%	680	14%
Central and South America	181	10%	251	8%	313	6%
Asia Pacific	525	28%	1740	54%	3228	66%
Sub Saharian Africa	32	2%	57	2%	107	2%
Middle East and North Africa	105	6%	165	5%	234	5%
World	1845	100%	3249	100%	4884	100%

Source: The emerging middle class in developing Countries.

OCDE Development Center.

Last update: 2010

# MIDDLE CLASS FORECAST



# MIDDLE CLASS FORECAST

Spending by the Global Middle Class, 2009 to 2030  
(millions of 2005 PPP dollars)

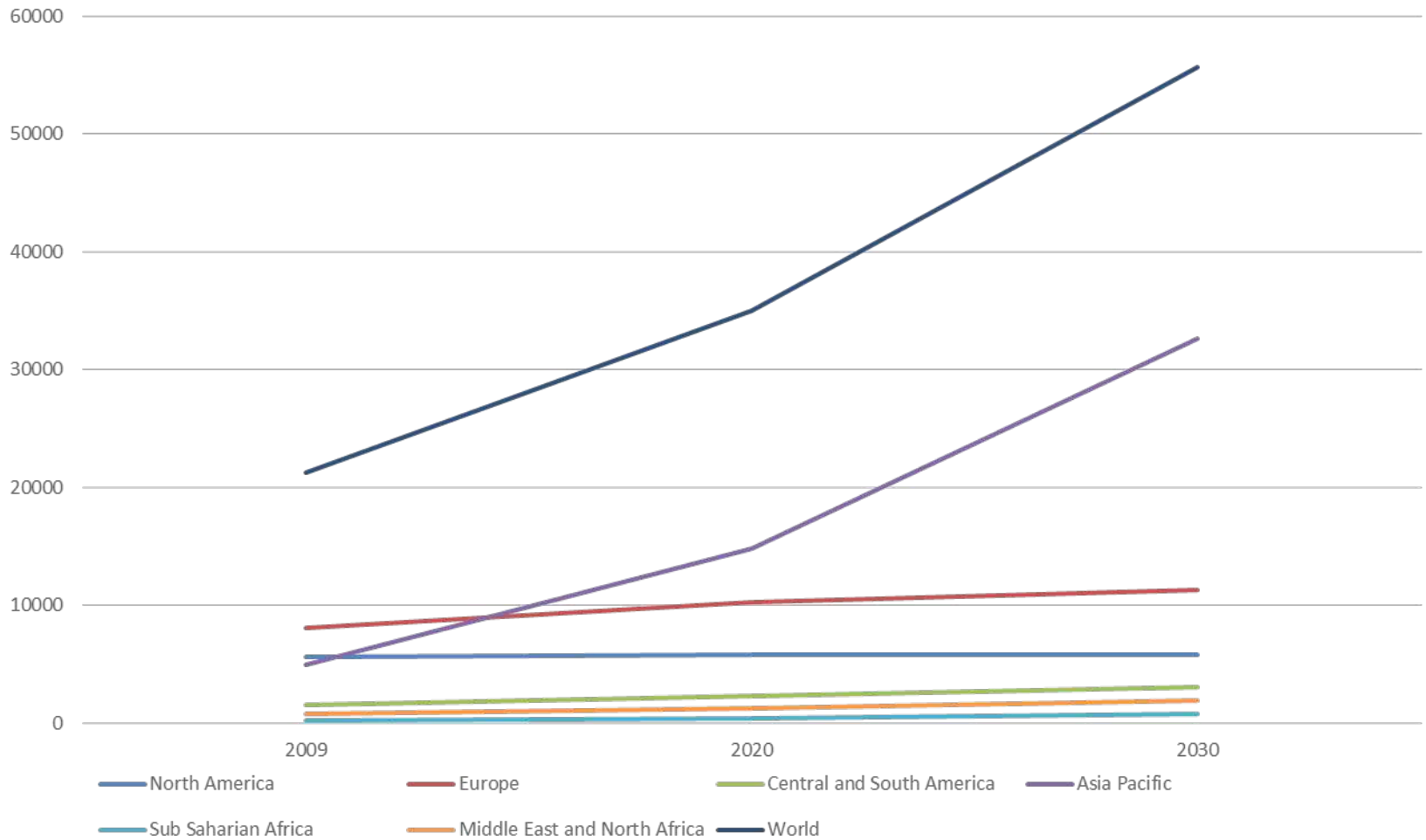
	2009		2020		2030	
North America	5602	26%	5863	17%	5837	10%
Europe	8138	38%	10301	29%	11337	20%
Central and South America	1534	7%	2315	7%	3117	6%
Asia Pacific	4952	23%	14798	42%	32596	59%
Sub Saharian Africa	256	1%	448	1%	827	1%
Middle East and North Africa	796	4%	1321	4%	1966	4%
World	21278	100%	35045	100%	55680	100%

Source: The emerging middle class in developing Countries. OCDE Development Center.

Last update: 2010

# MIDDLE CLASS FORECAST

Spending by the Global Middle Class, 2009 to 2030 (millions of 2005 PPP dollars)



Source: The emerging middle class in developing Countries.

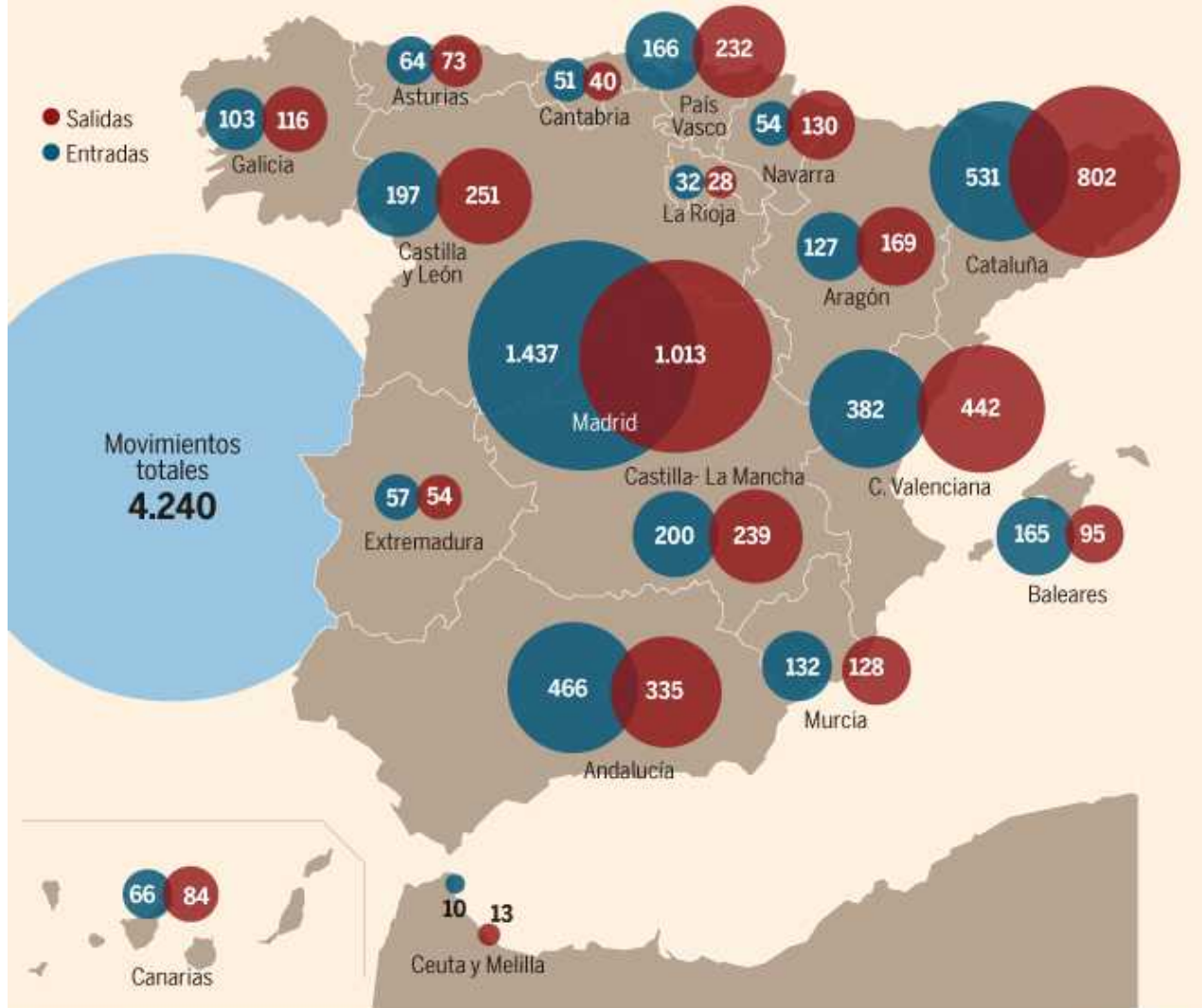
OCDE Development Center.

Last update: 2010

# MOVEMENT OF COMPANIES

## EL MAPA DE LA DESLOCALIZACIÓN EMPRESARIAL ENTRE AUTONOMÍAS

Traslado de domicilio fiscal de las empresas entre CCAA en 2016. N° de empresas



# MOVEMENT OF COMPANIES 2016





# TALENT ATTRACTIVENESS AND BUSINESS

Global Talent Competitiveness Index	GTCI 2014
Country	Rank
Switzerland	1
Singapore *	2
Luxembourg *	3
United States	4
Canada	5
Sweden	6
United Kingdom	7
Denmark *	8
Australia	9
Ireland *	10
Norway *	11
Netherlands	12
Finland *	13
Germany	14
Austria	15
New Zealand *	16
Iceland *	17
Belgium	18
Estonia *	19
Japan	20
Israel	21
United Arab Emirates	22

In blue: Countries with less than 10 million inhabitants.

\*Countries with less than 6 million inhabitants.

Source: Global Talent Competitiveness index 2014

# TALENT ATTRACTIVENESS AND BUSINESS

Global Talent Competitiveness Index	GTCI 2014	Ease of Doing Business world bank	
Country	Rank	<b>Economy</b>	bankRank
Switzerland	1	<b>Singapore *</b>	1
Singapore *	2	<b>New Zealand *</b>	2
Luxembourg *	3	Hong Kong SAR, China	3
United States	4	<b>Denmark *</b>	4
Canada	5	Korea, Rep.	5
Sweden	6	<b>Norway *</b>	6
United Kingdom	7	<b>United States</b>	7
<b>Denmark *</b>	8	<b>United Kingdom</b>	8
Australia	9	<b>Finland *</b>	9
<b>Ireland *</b>	10	<b>Australia</b>	10
<b>Norway *</b>	11	<b>Sweden *</b>	11
Netherlands	12	<b>Iceland *</b>	12
<b>Finland *</b>	13	<b>Ireland *</b>	13
Germany	14	<b>Germany</b>	14
<b>Austria</b>	15	Georgia *	15
<b>New Zealand *</b>	16	<b>Canada</b>	16
<b>Iceland *</b>	17	<b>Estonia *</b>	17
Belgium	18	Malaysia	18
<b>Estonia *</b>	19	Taiwan, China	19
Japan	20	<b>Switzerland *</b>	20
<b>Israel</b>	21	<b>Austria</b>	21
<b>United Arab Emirates</b>	22	<b>United Arab Emirates</b>	22

In blue: Countries with less than 10 million inhabitants.

\*Countries with less than 6 million inhabitants.

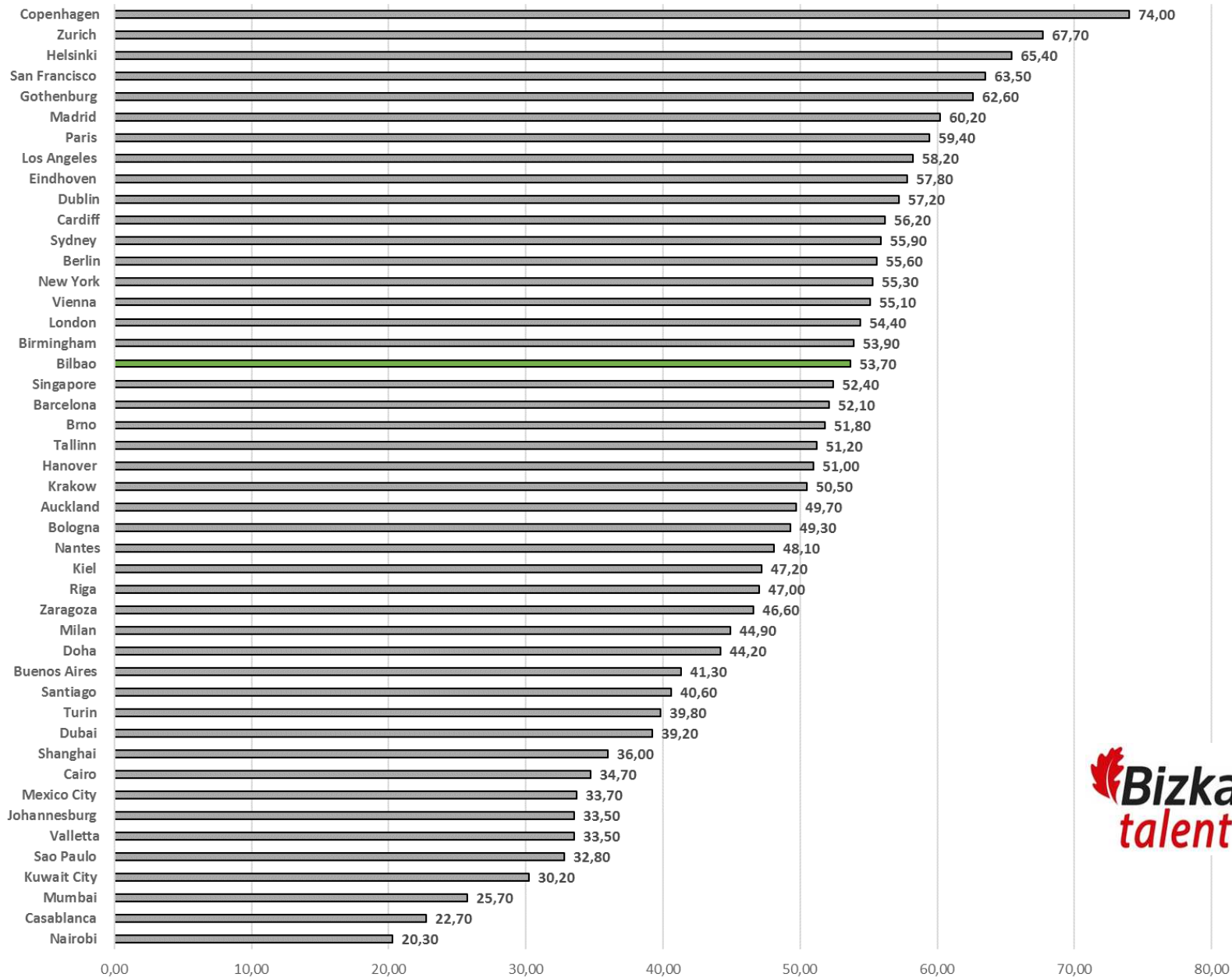
In red: Countries appearing in both rankings

Source: Global Talent Competitiveness index 2014  
The World bank 2014

# GLOBAL TALENT COMPETITIVENESS INDEX 2017 RANKINGS

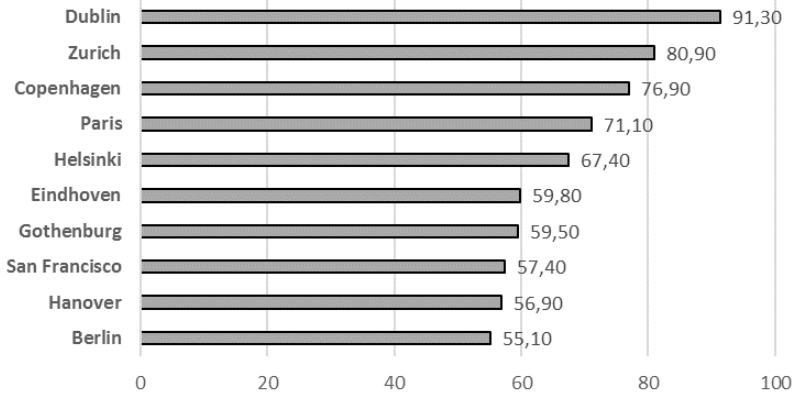


# GLOBAL CITY TALENT COMPETITIVENESS INDEX RANKINGS AND OVERALL SCORES

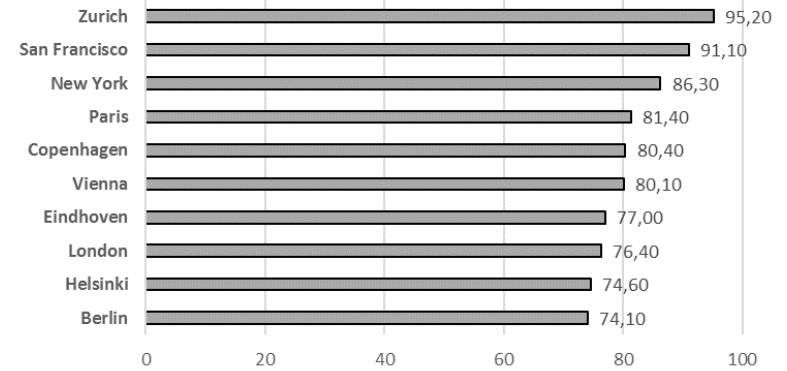


## TOP 10 CITY RANKINGS AND SCORES, BY GCTCI PILLAR

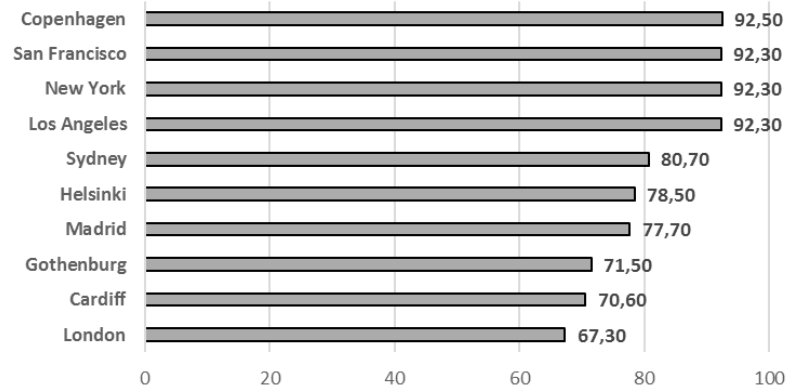
### Pillar 1. Enable



### Pillar 2. Attract

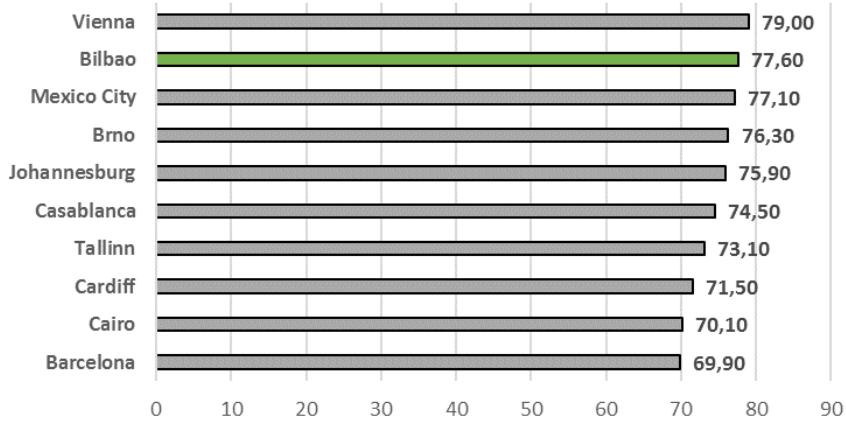


### Pillar 3. Grow

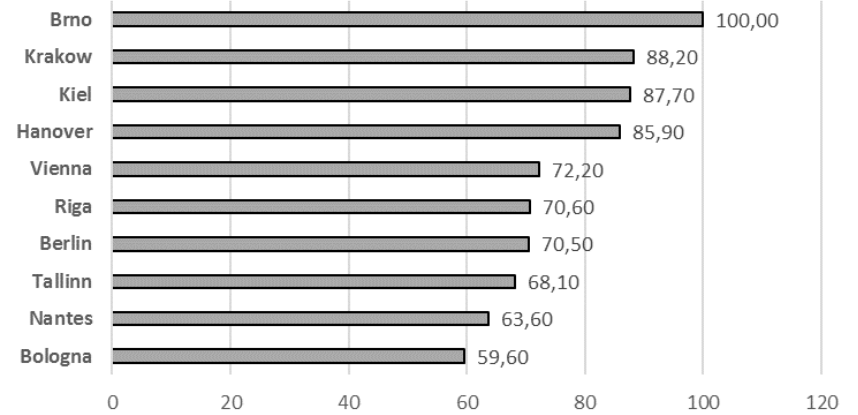


## TOP 10 CITY RANKINGS AND SCORES, BY GCTCI PILLAR

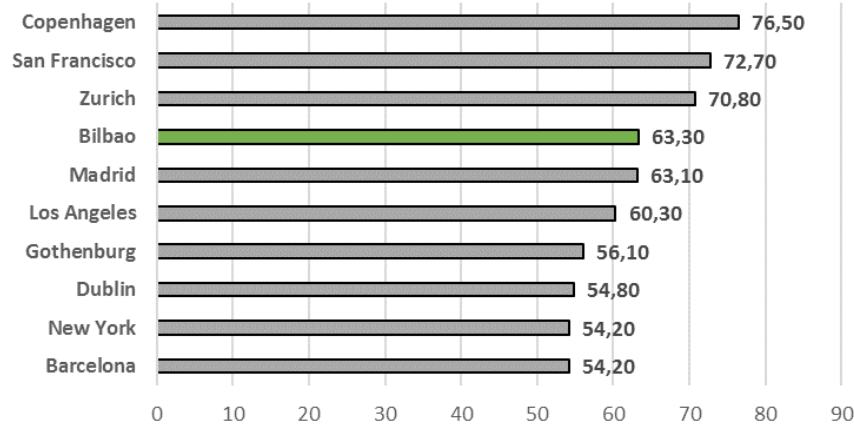
### Pillar 4. Retain



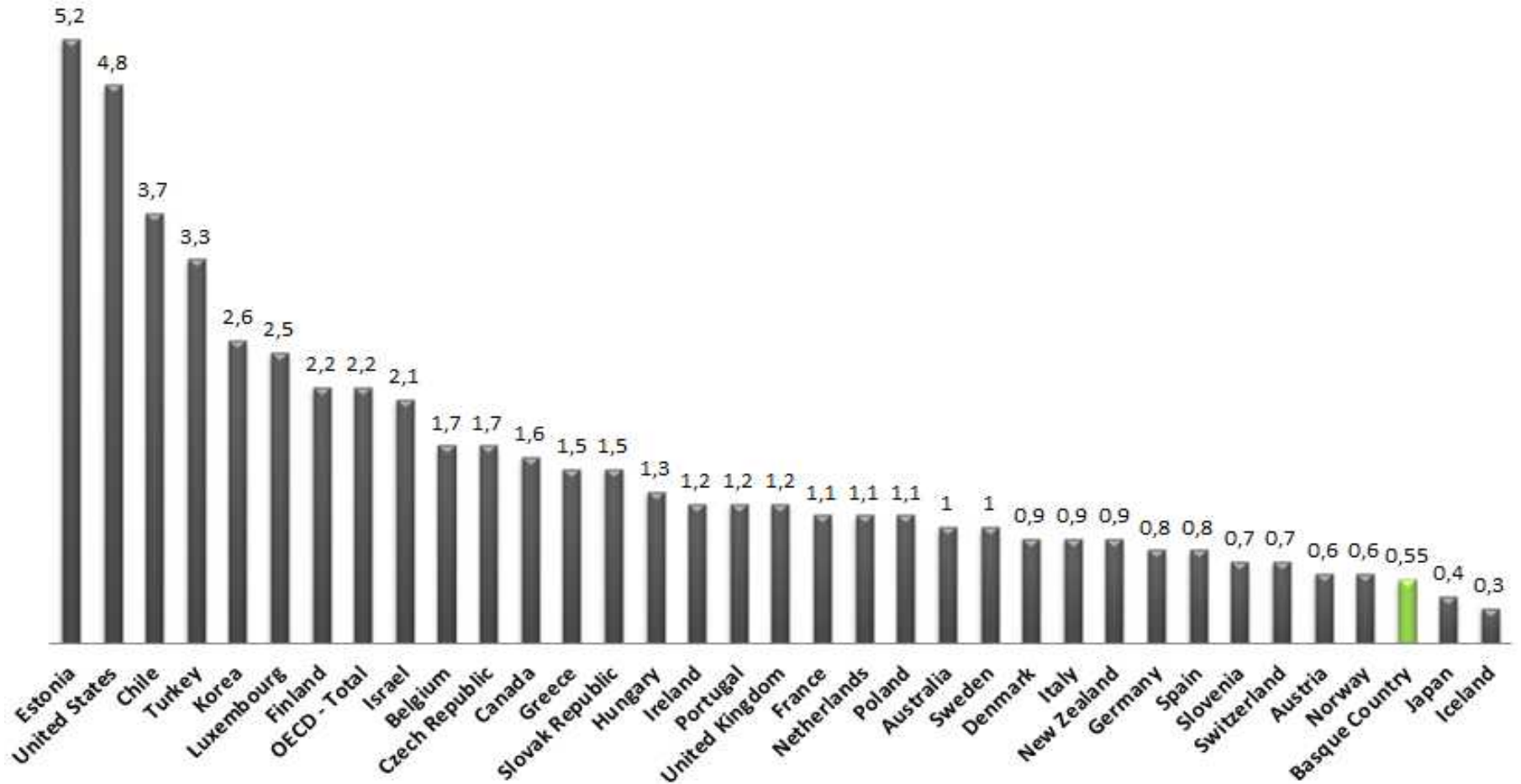
### Pillar 5. Utilise Skills



### Pillar 6. Build Global Knowledge



# HOMICIDE RATE

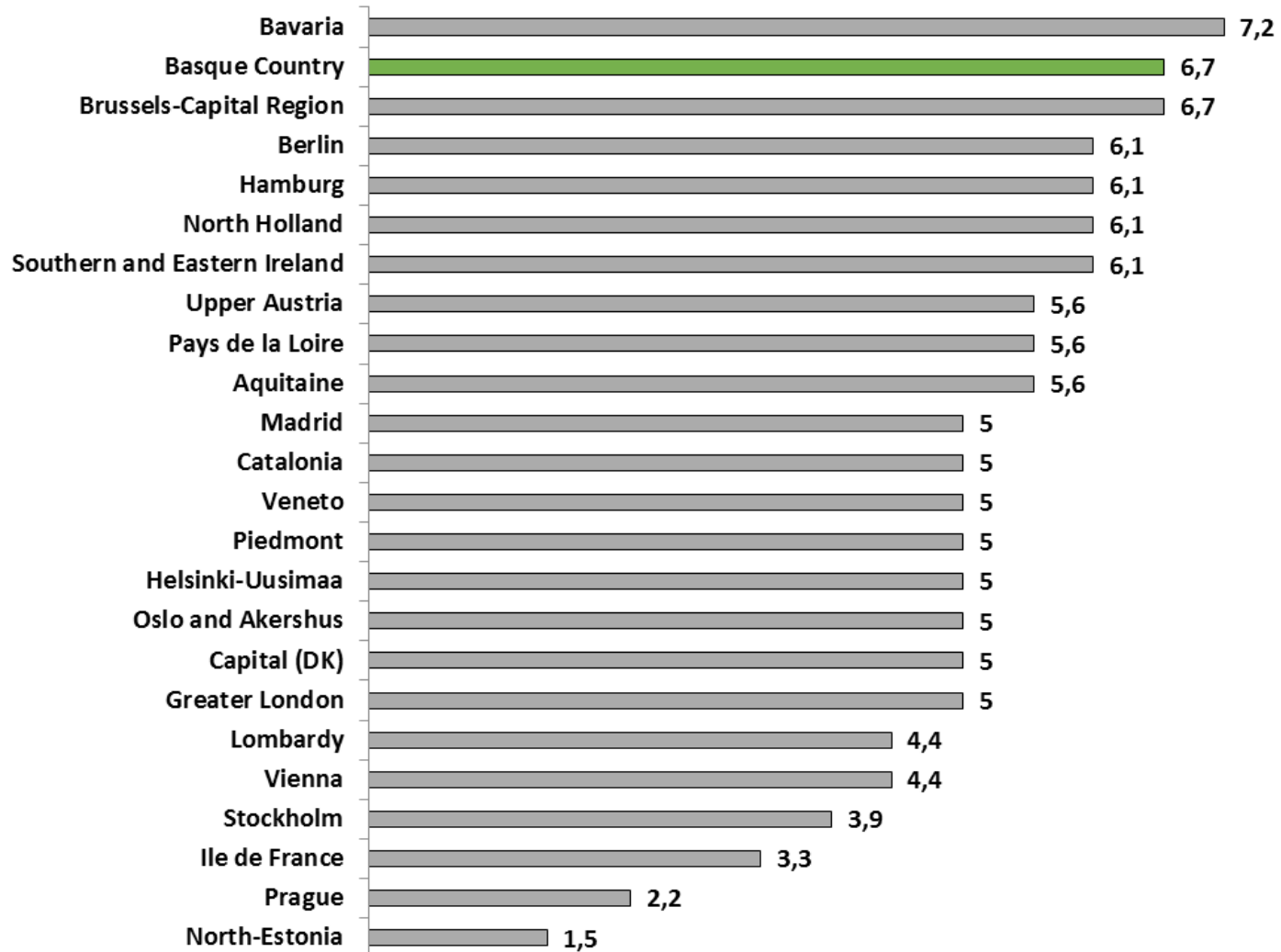


Annual police recorded intentional homicides. Rate per 100,000 population

Source: OCDE: Better Life. Basque Government.

Last update: OCDE: Better Life 2013. Basque Government 2012.

# HOUSING

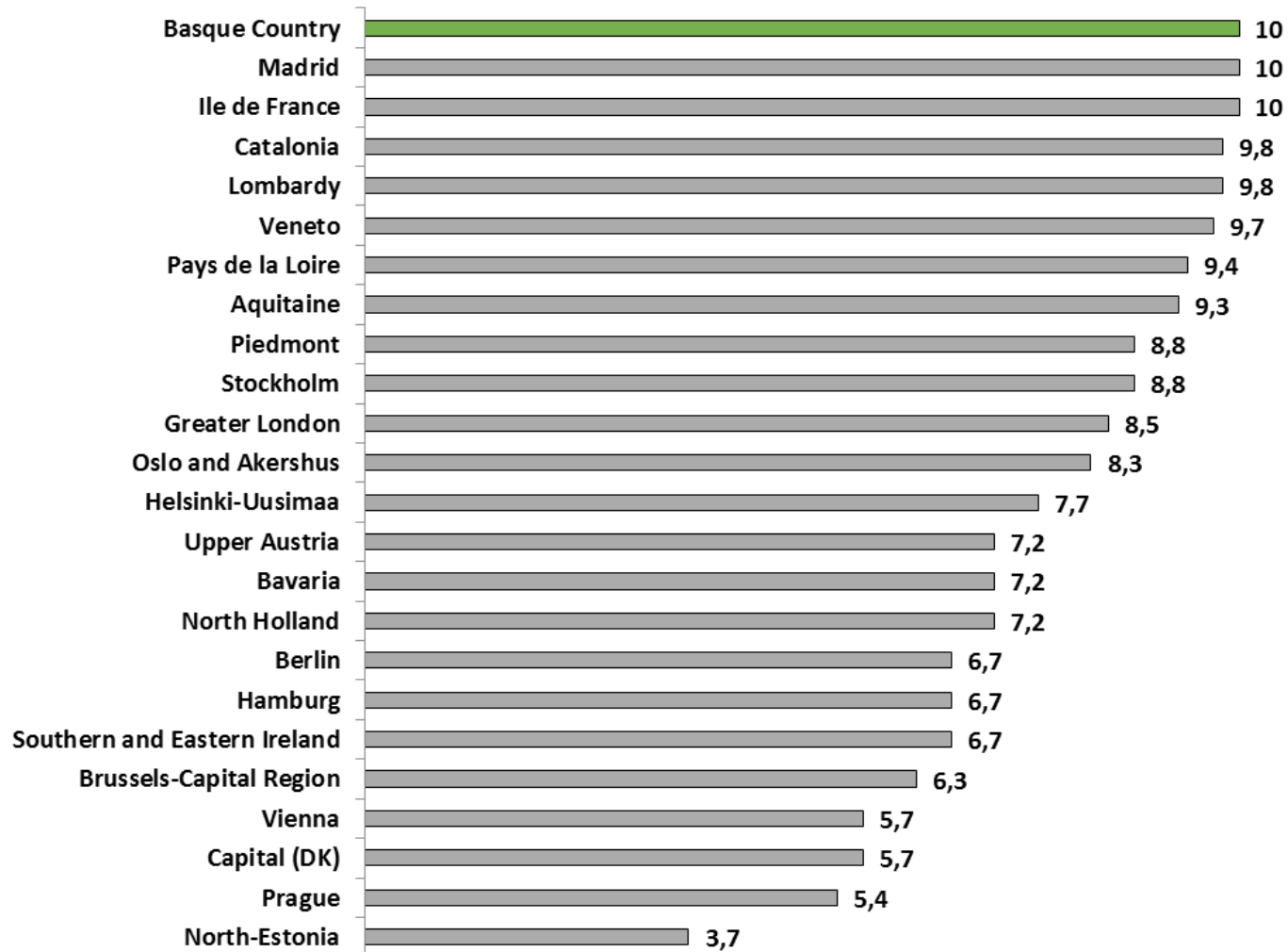


Source: OECD REGIONAL WELL-BEING INDICATORS

Last update: July 2016



# HEALTH

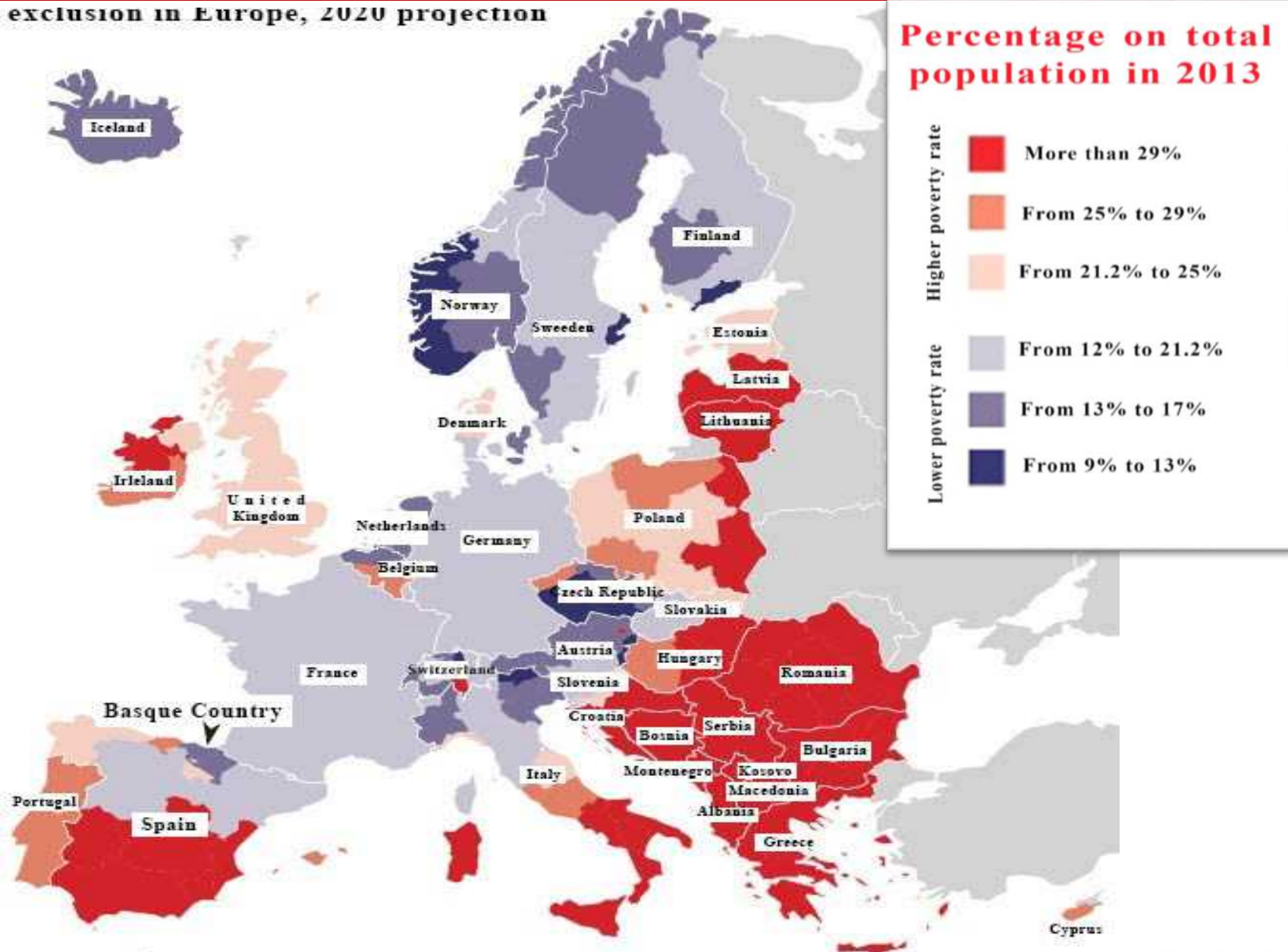


Source: OECD REGIONAL WELL-BEING INDICATORS

Last update: July 2016

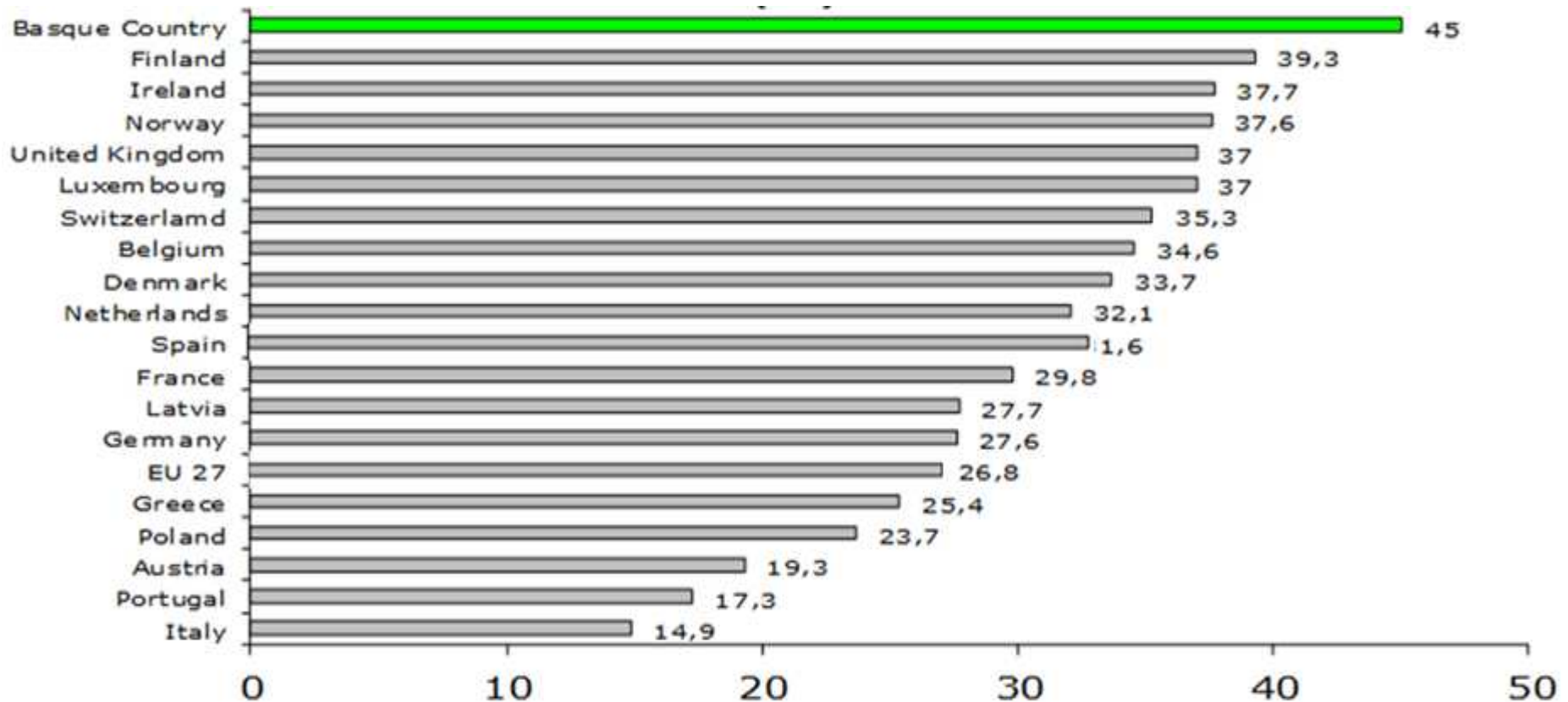
# People at risk of poverty or social exclusion in Europe, 2020 projection

exclusion in Europe, 2020 projection



# The Basque Country's socio-economic structure

Persons aged 25-64 with tertiary education attainment:

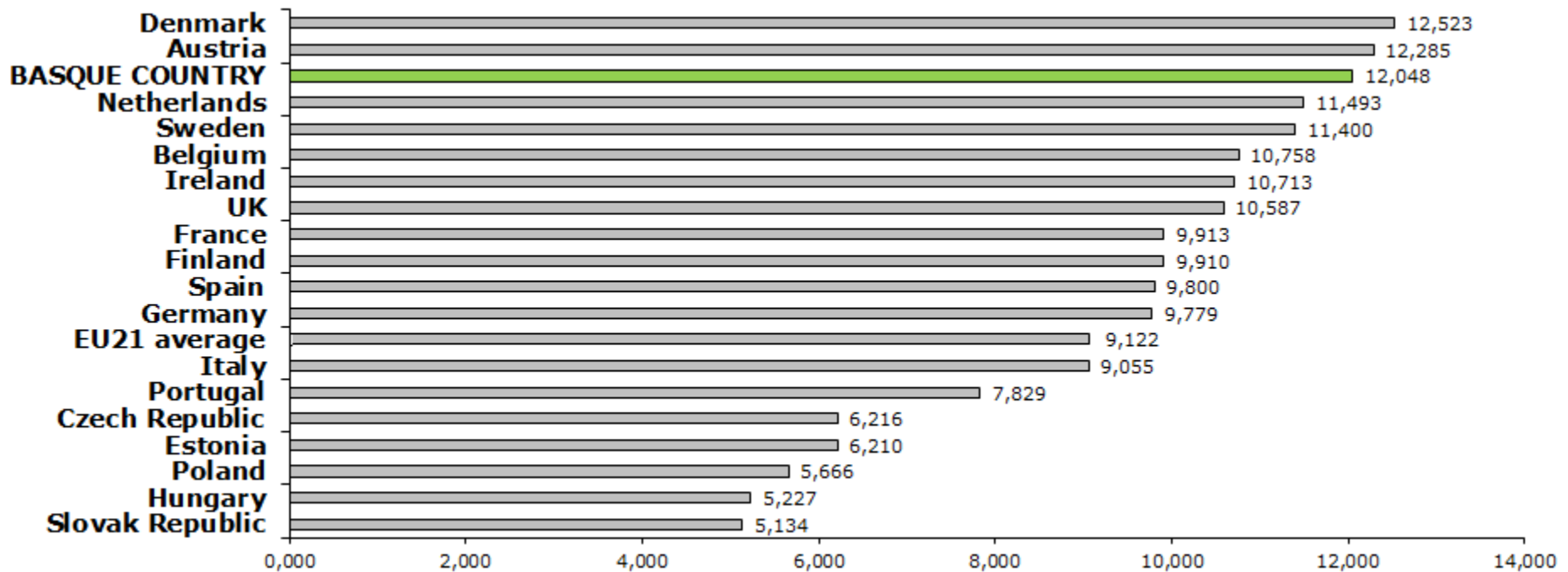


Source: Eurostat

Last Update: 2012, August 6th

# The Basque Country's socio-economic structure

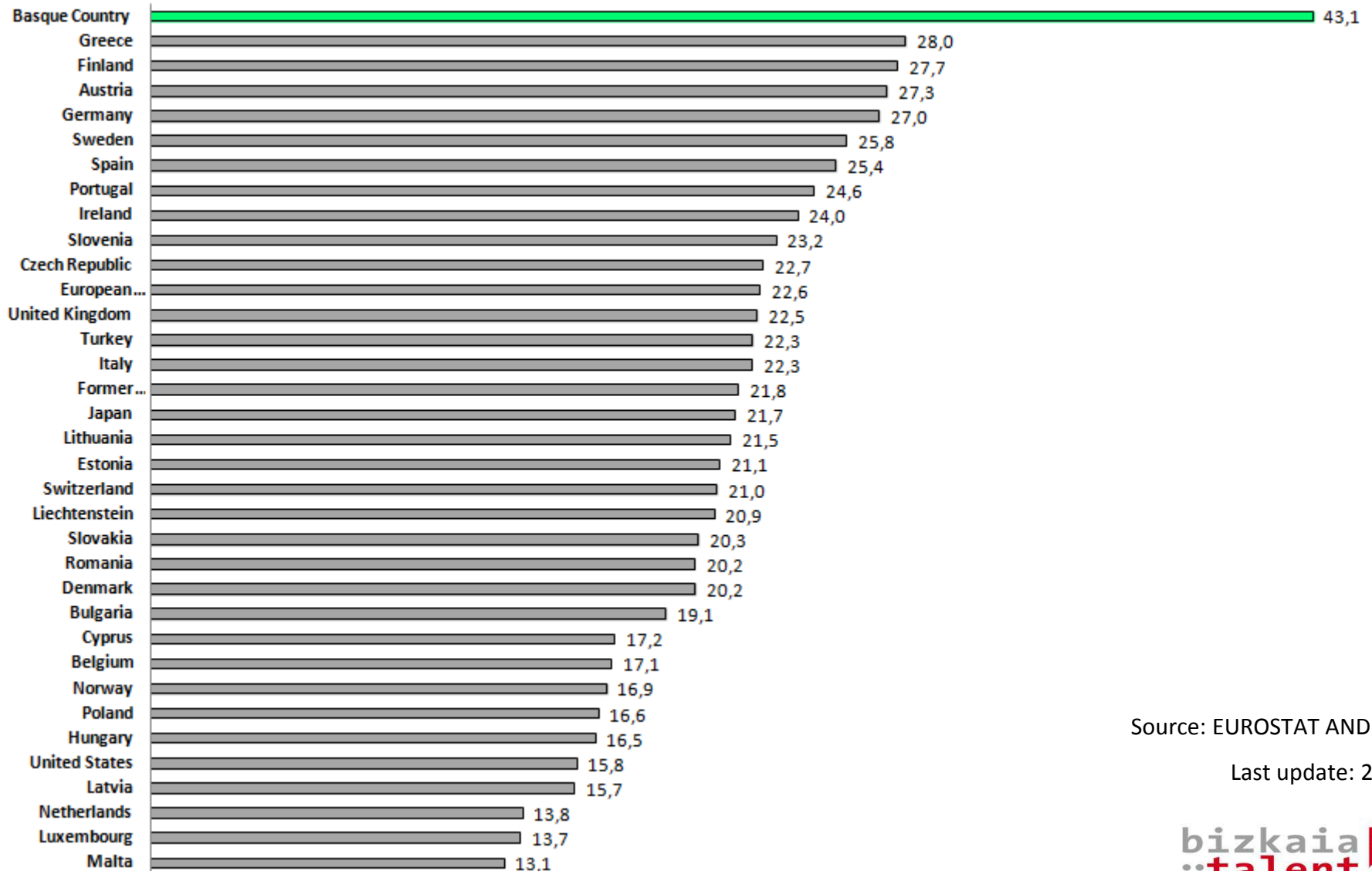
Total expenditure in euros per student in educational institutions from primary to tertiary



Source: OCDE

Last update: 2011

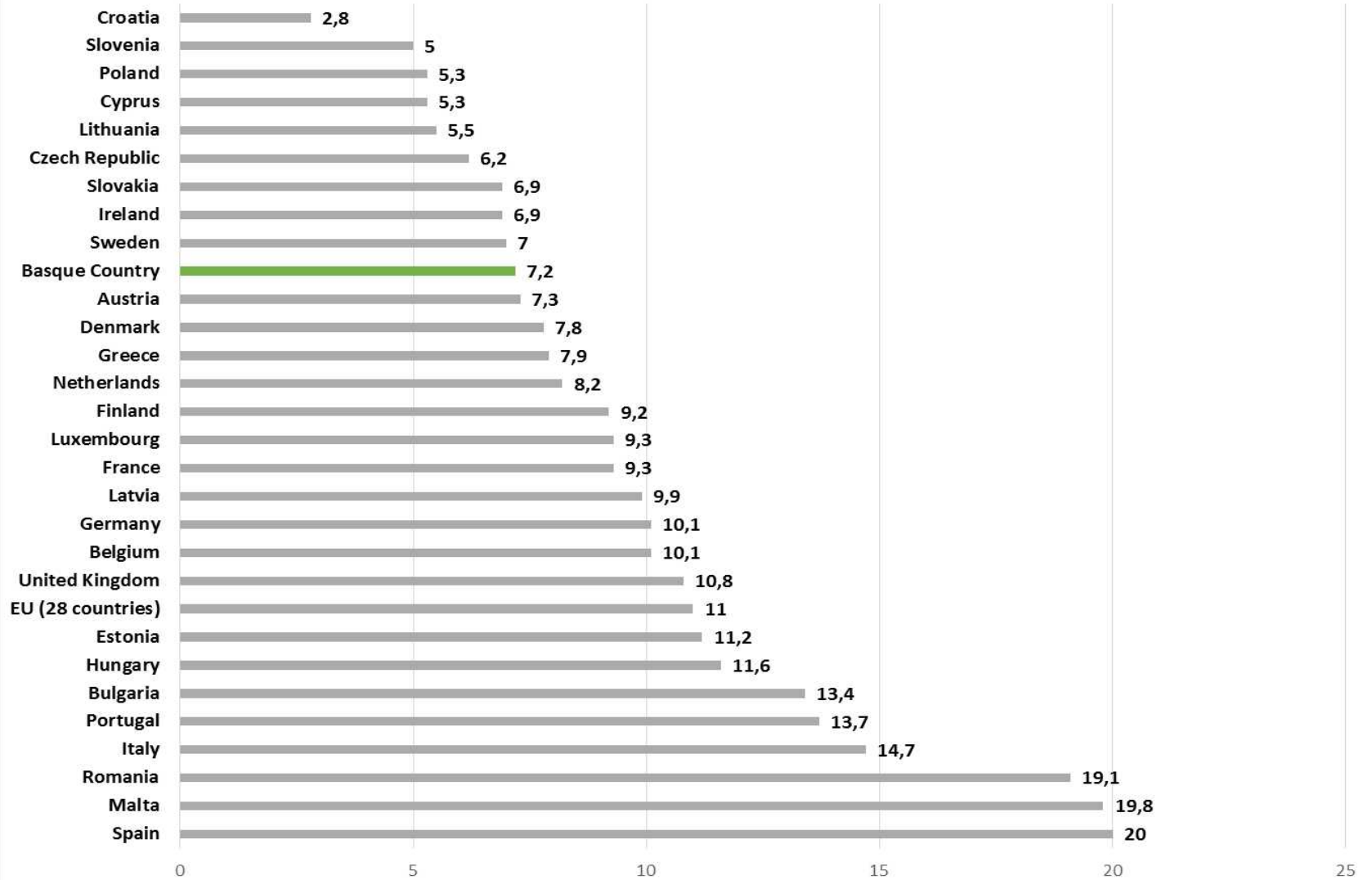
# Top ranked country in the EU in terms of science and technology graduates (43% )



Source: EUROSTAT AND INE

Last update: 2013

# Early leavers from education and training, age group 18-24



Source: Eustat

Last update: May 2016

## The largest age-group

**The largest  
age-group  
in the  
Basque  
Country is**

**40**

**years-old**

**The largest  
age-group  
in  
Bilbao is**

**52**

**years-old**

## The largest age-group

**The largest  
age-group  
in the  
Basque  
Country is**

**40**

**years-old**

**The largest  
age-group  
in  
Bilbao is**

**52**

**years-old**

**The largest  
age-group  
in  
Finland is**

**67**

**years-old**

**The largest  
age-group  
in  
Helsinki is**

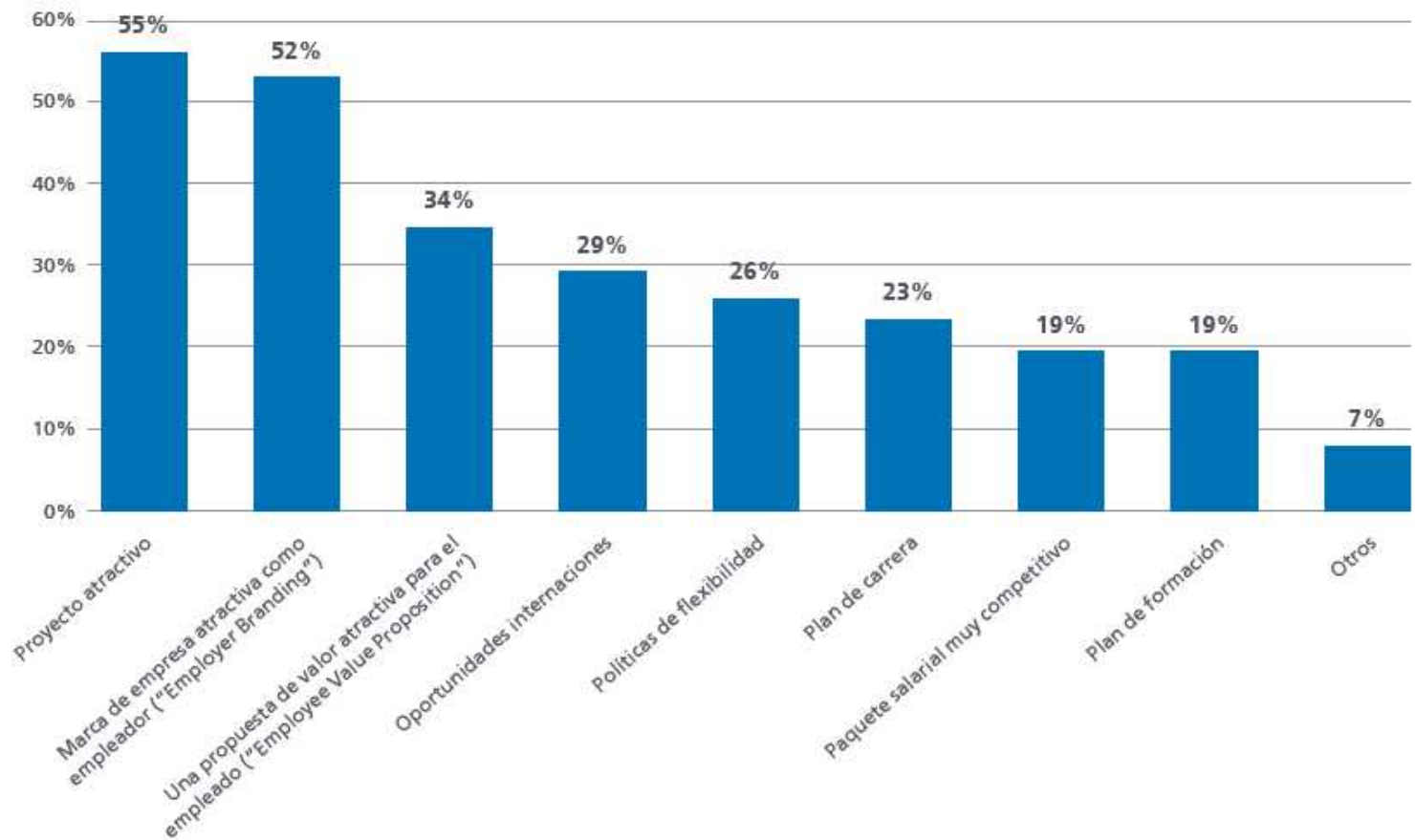
**27**

**years-old**



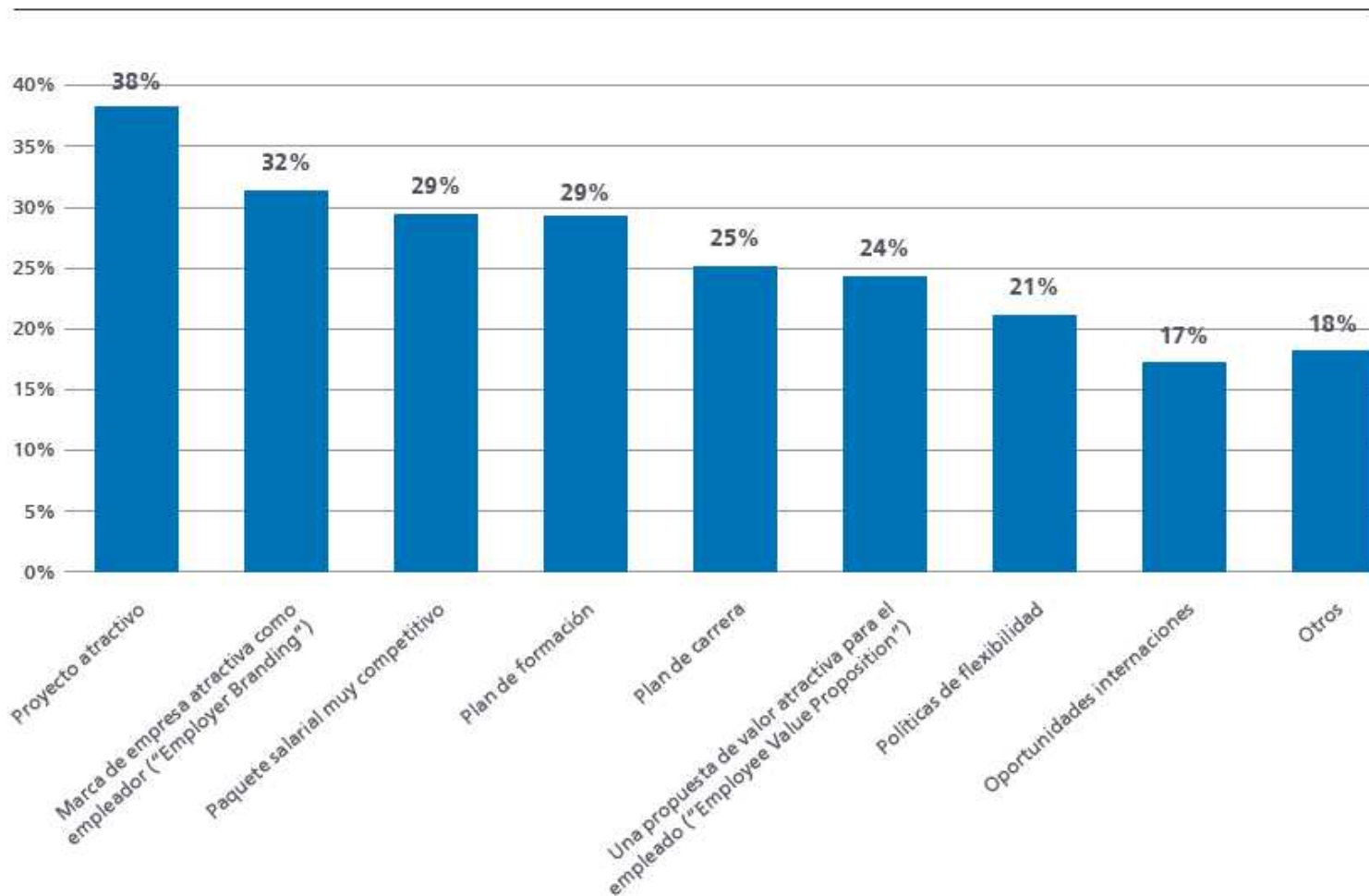
# JOB AND MOBILITY

Gráfico 3.3  
Claves del éxito para atraer profesionales con talento. Visión de las empresas.



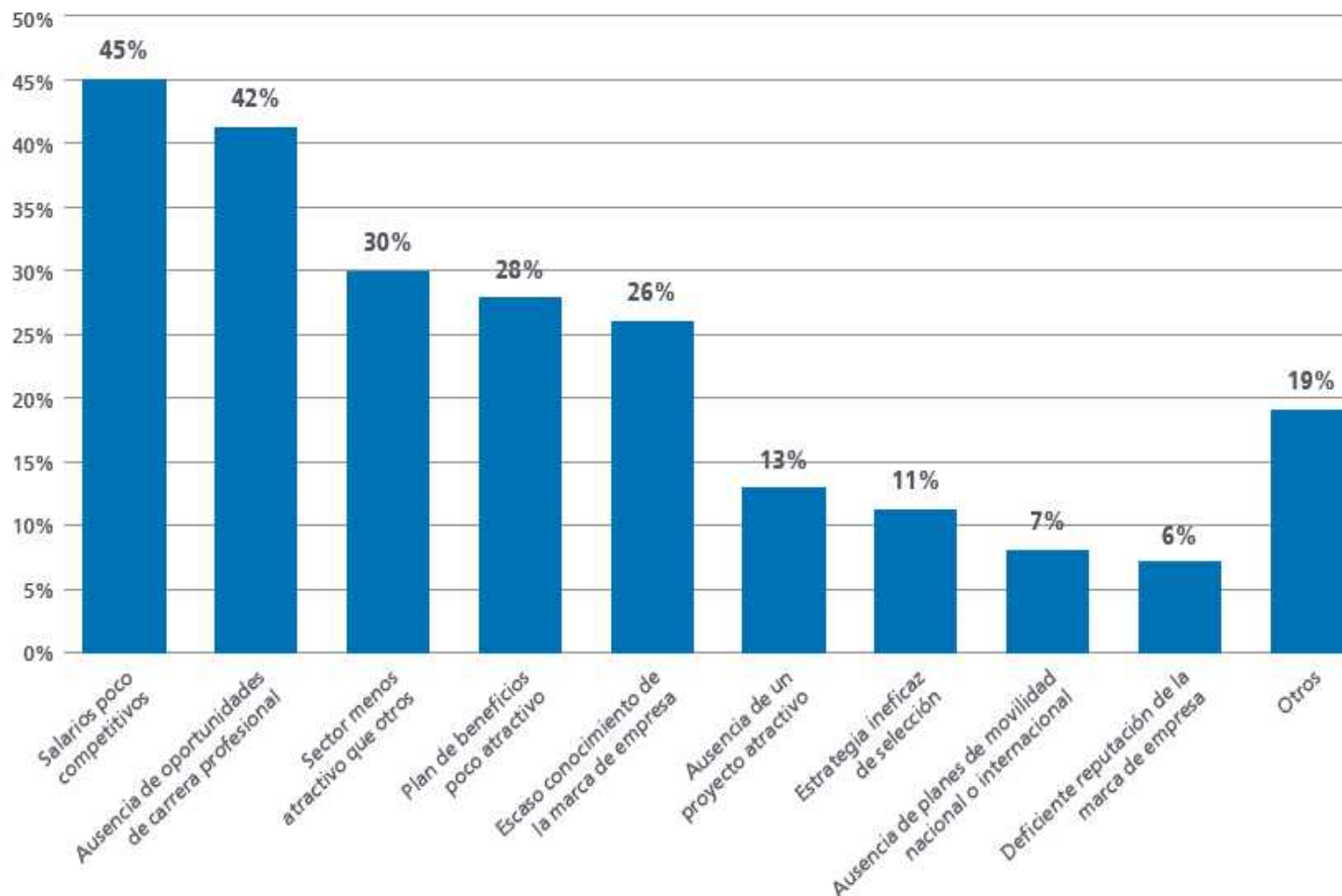
# JOB AND MOBILITY

Gráfico 3.4  
Claves del éxito para atraer profesionales con talento. Visión de los profesionales.



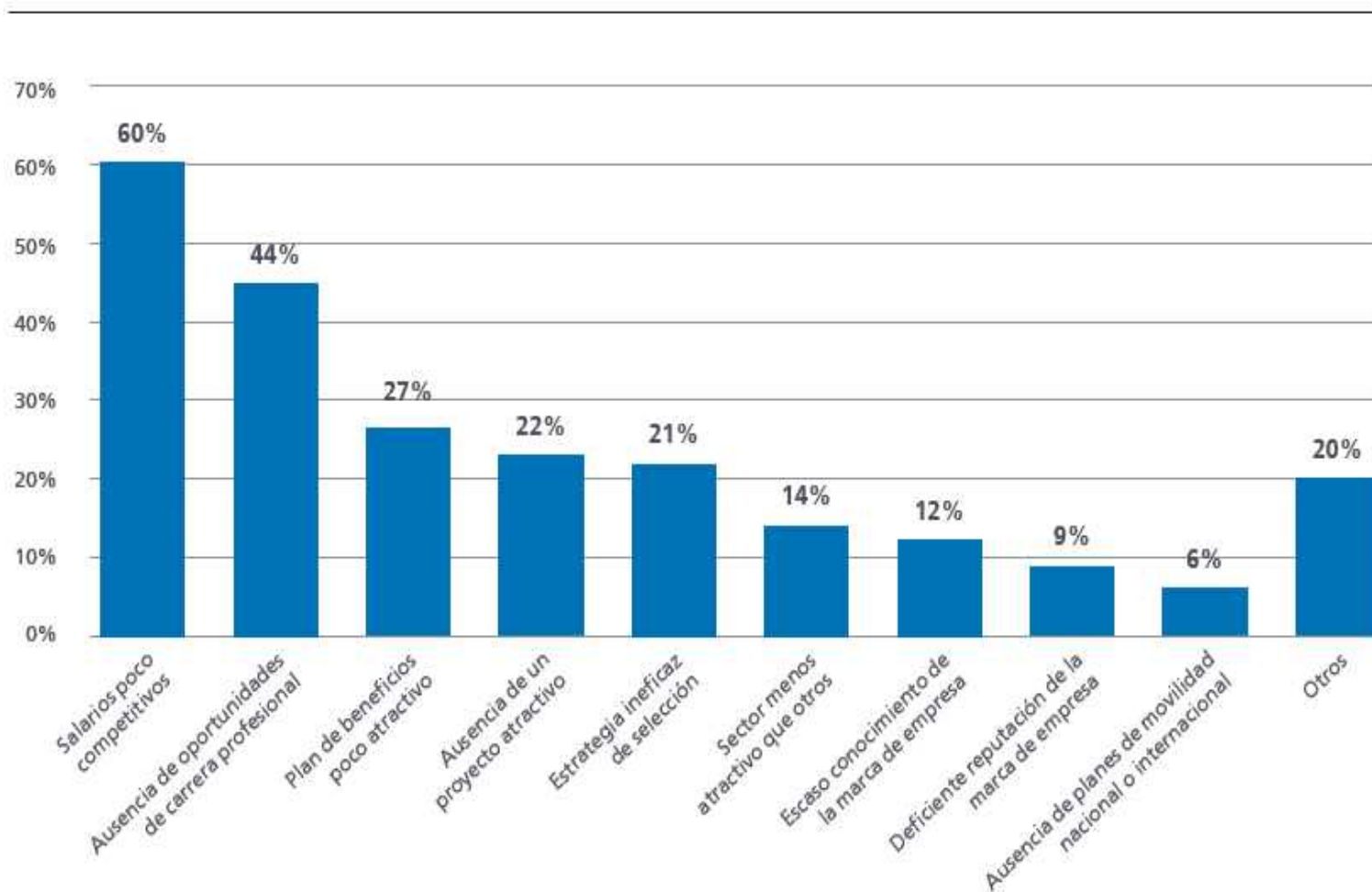
# JOB AND MOBILITY

Gráfico 3.5  
Dificultades para atraer profesionales con talento. Visión de las empresas.



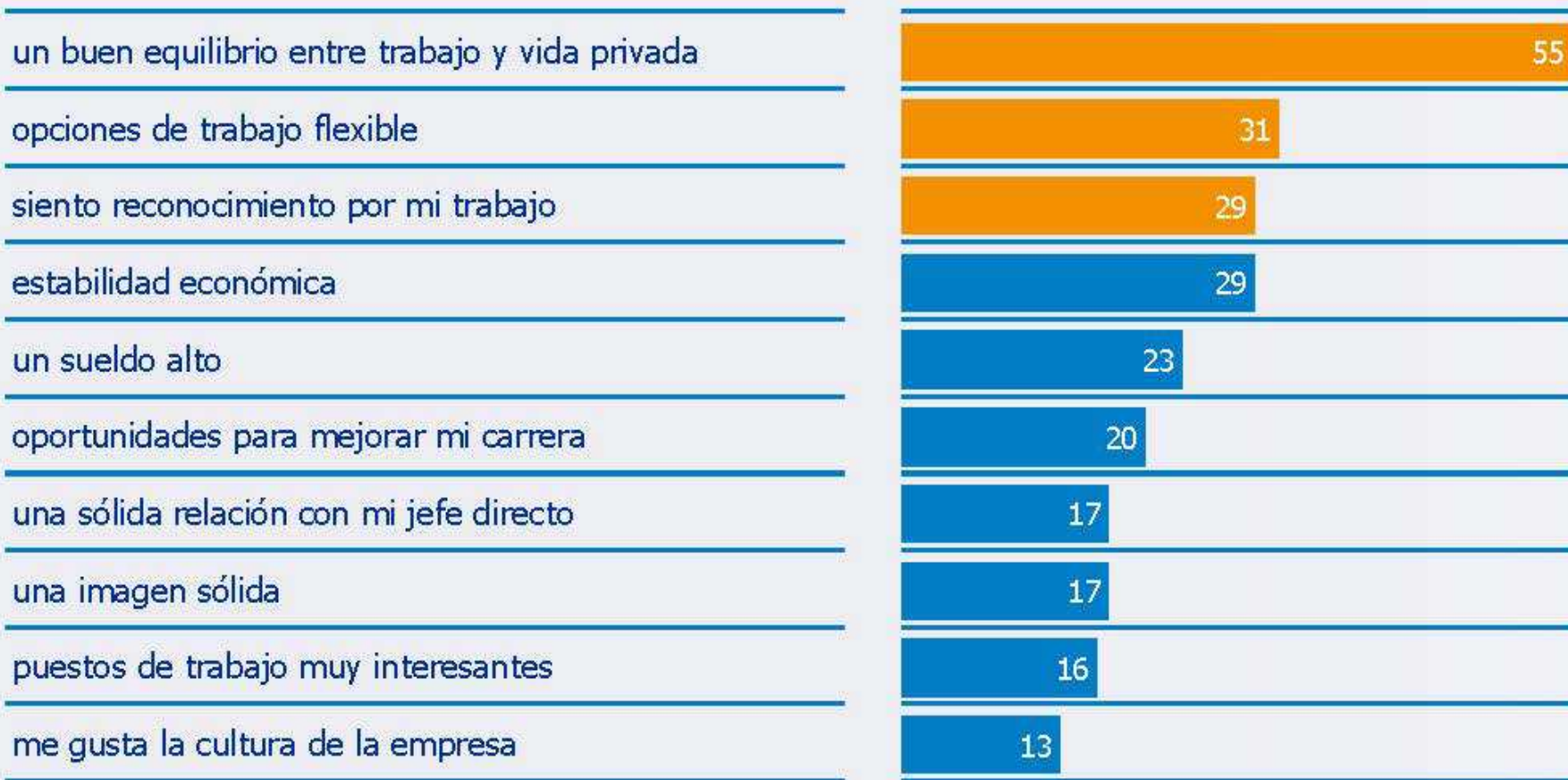
# JOB AND MOBILITY

Gráfico 3.6  
Dificultades para atraer profesionales con talento. Visión de los profesionales.



## ¿Qué factores le llevan a quedarse en su empresa actual? (top 3)

### motivos de quienes se quedan



## ¿Qué factores contribuyeron a su decisión de cambiar de empresa? (top 3)

### motivos de quienes se marchan



# MILLENNIALS AND JOBS

## TOP FIVE PRIORITIES WHEN LOOKING FOR A JOB



Money  
**92%**



Security  
**87%**



Holidays/  
Time Off  
**86%**



Great  
People  
**80%**



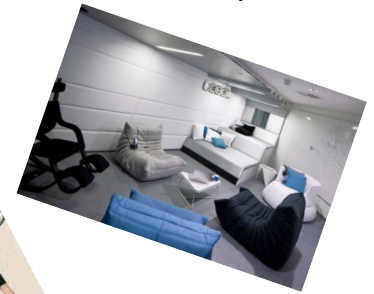
Flexible  
Working  
**79%**

# BEST WORKPLACES SPAIN

This model measures the level of trust within the organization, to help firms create a work environment where professionals will attain their business goals, give the best of themselves, and practice teamwork, taking into account the level of trust within the organization, the labour policies, people's directions and the work environment.

Job creation is one of the most important of the criteria which, additionally, take into account further aspects:

- 96% of the firms present in the ranking possess rest areas for employees



- 95% have flexitime and 86% permit working from home



- 79% provide private medical insurance.



Any professional, regardless of his/her position, can help create an excellent place to work.



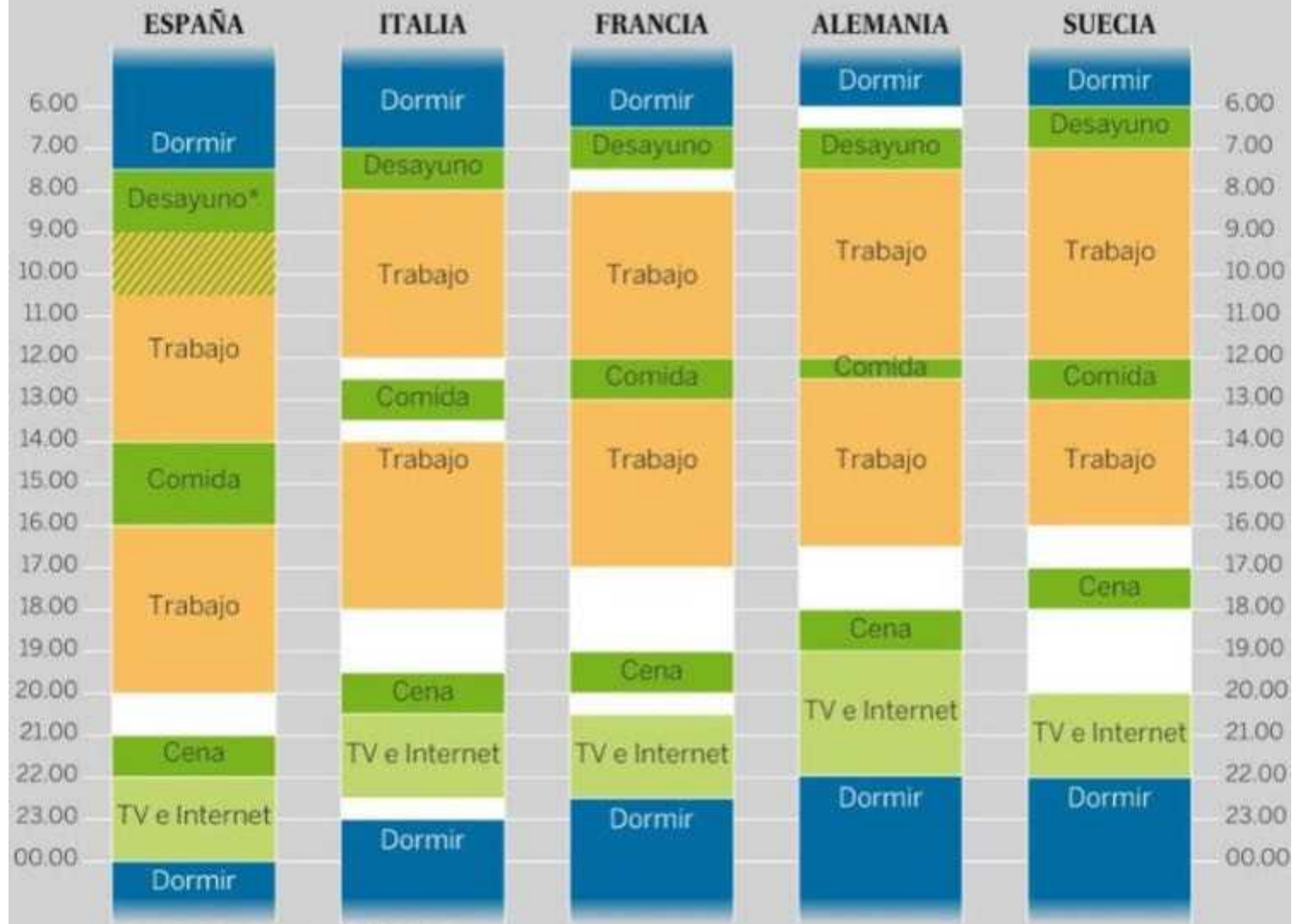


# TENDENCIAS DE MERCADO DE TRABAJO EN ESPAÑA EN LAS PRÓXIMAS DECADAS (I)



- El talento será global y móvil.
- Flexibilización de las formas y tiempos de trabajo.
- En España, contrariamente a la tendencia global, las cualificaciones medias vivirán mayor crecimiento de las ofertas de empleo que las altas (representan actualmente el 27% frente al 47% de la UE).
- Medio ambiente, Tecnologías de la Información y Comunicación (TIC) y Turismo serán sectores protagonistas frente a Sector Primario, construcción, transporte, sector financiero e industria manufacturera.
- Seremos menos gente para trabajar habrá más inactivos y parados por ocupado.
- En 2033, el 66% de la población será nativo digital (Millenials y Postmillenials): tendrán su marca personal en RRSS, serán más internacionales, más intelectuales, más emprendedores y con mayor capacidad de adaptación.

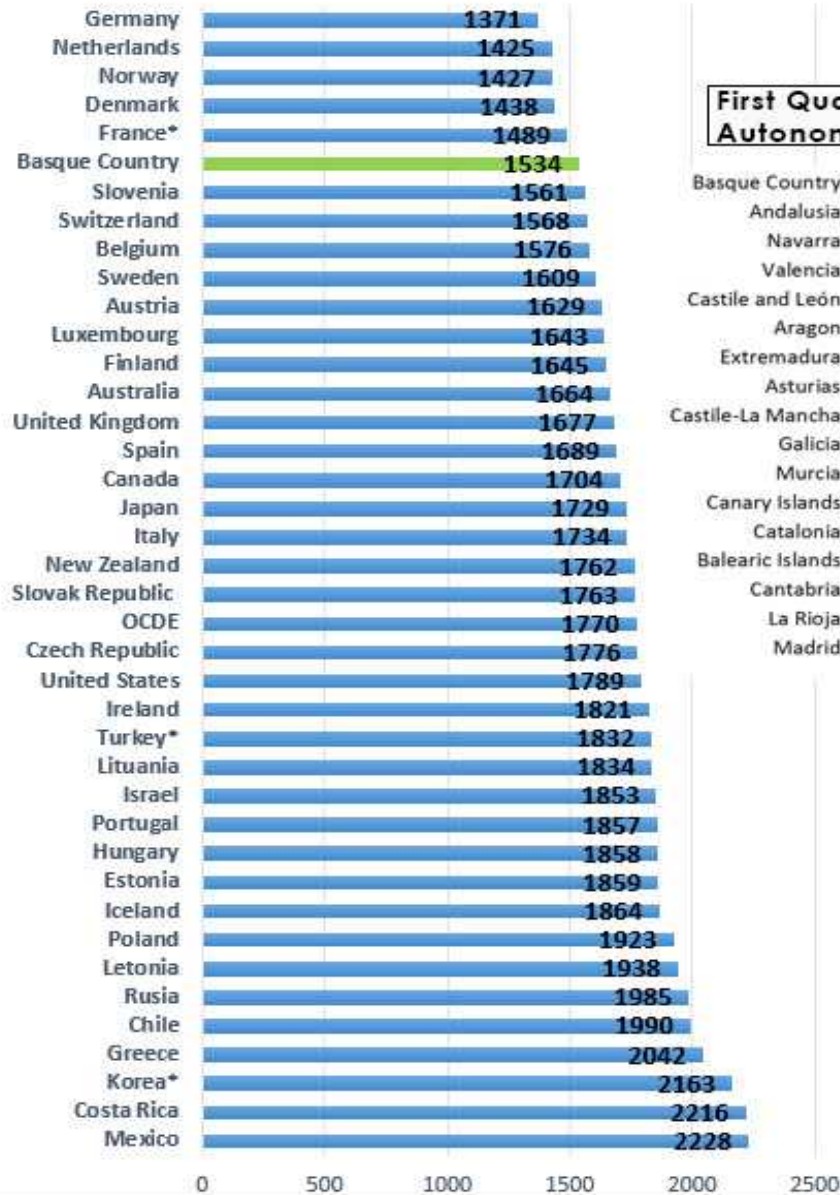
## USO DEL TIEMPO POR PAÍSES



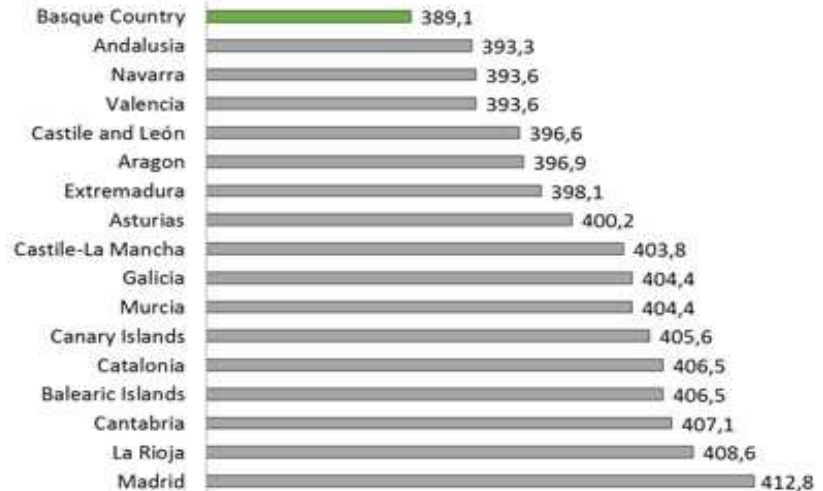
\*Variable: de 7.30-8.30 a 10.00-10.30)

# WORKDAY BY COUNTRY PER YEAR

## Working hours/ year 2014 2013\*

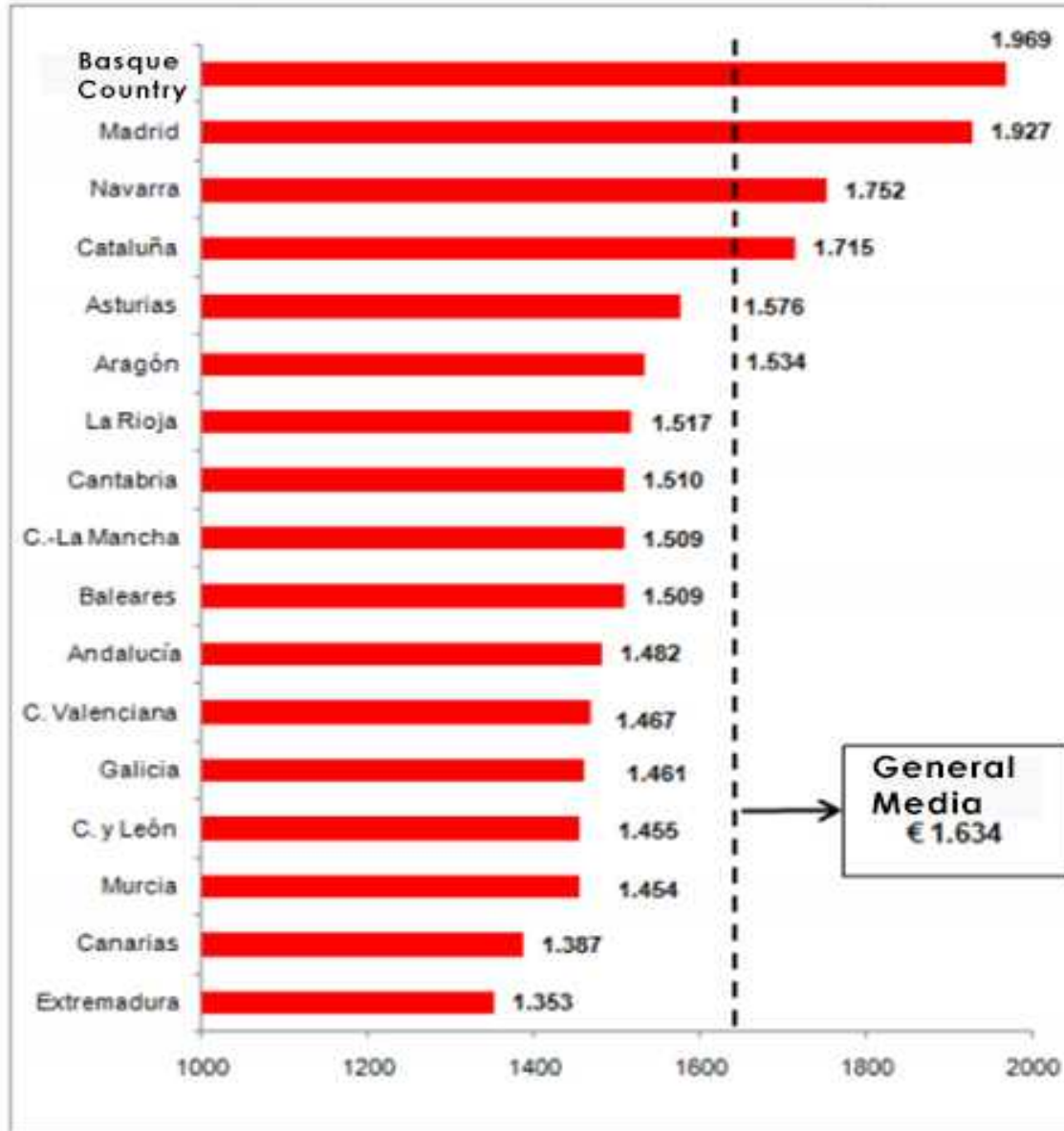


## First Quarter of 2015 - Working hours in the Autonomous Communities



# Average wage per Autonomous Community

Data in euros for 2014



SOURCE: ADECCO BASED ON INE AND EUROSTAT DATA. 2015

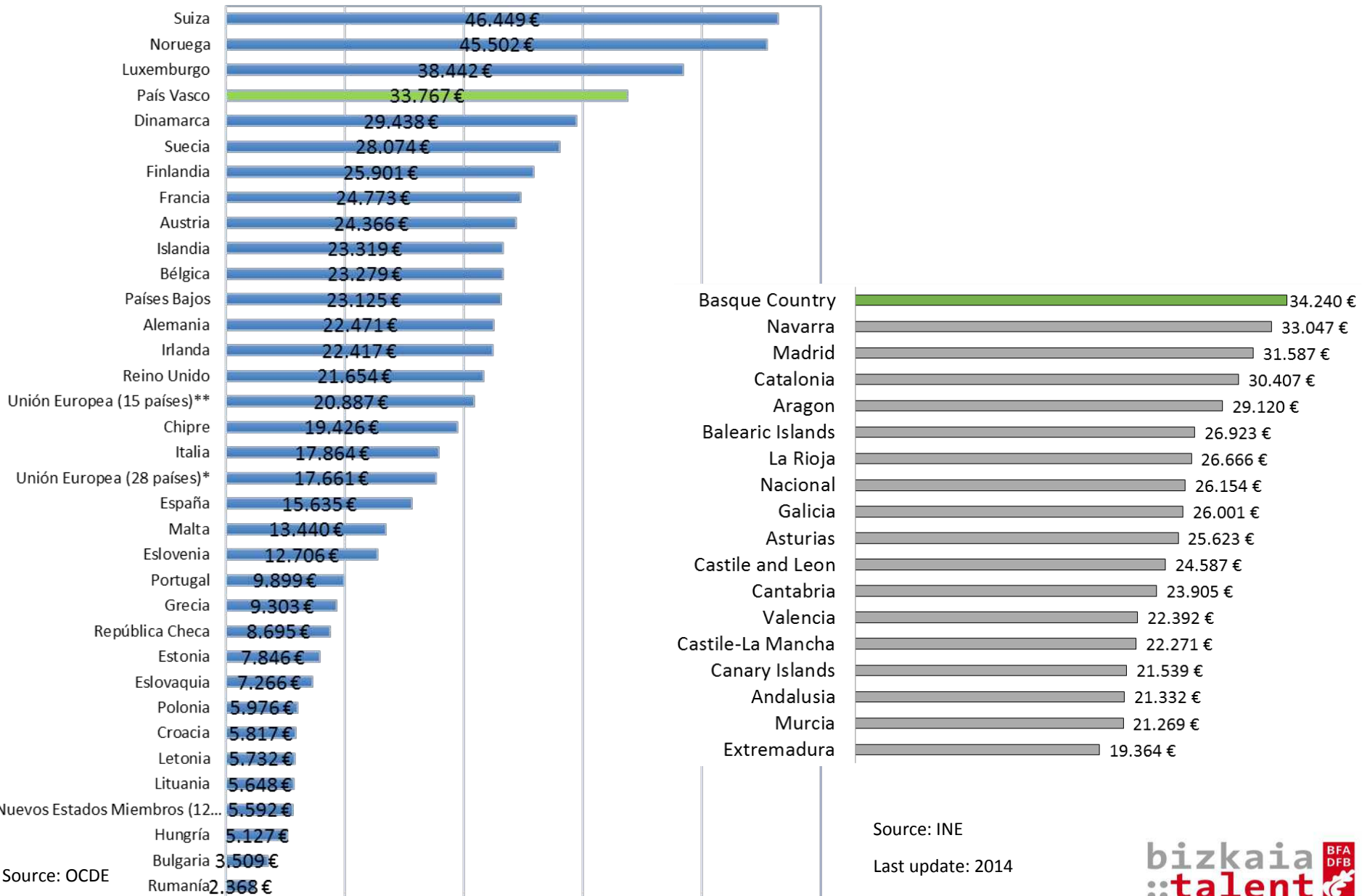
# JOB TAX IN EUROPE BY COUNTRY 2015

## La fiscalidad del trabajo en Europa 2015

■ Tipo impositivo real %



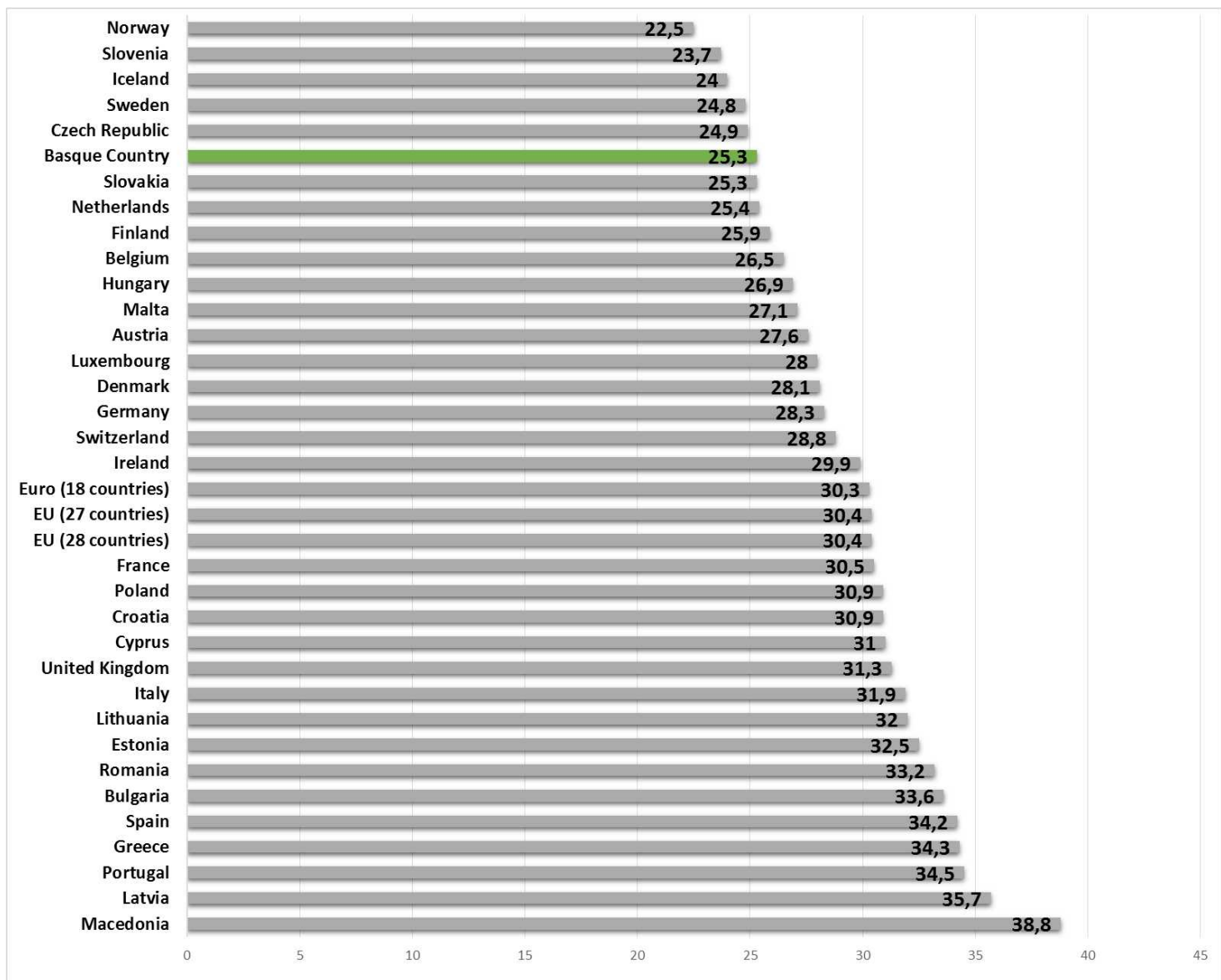
# NET HOUSEHOLD INCOME EUROPE



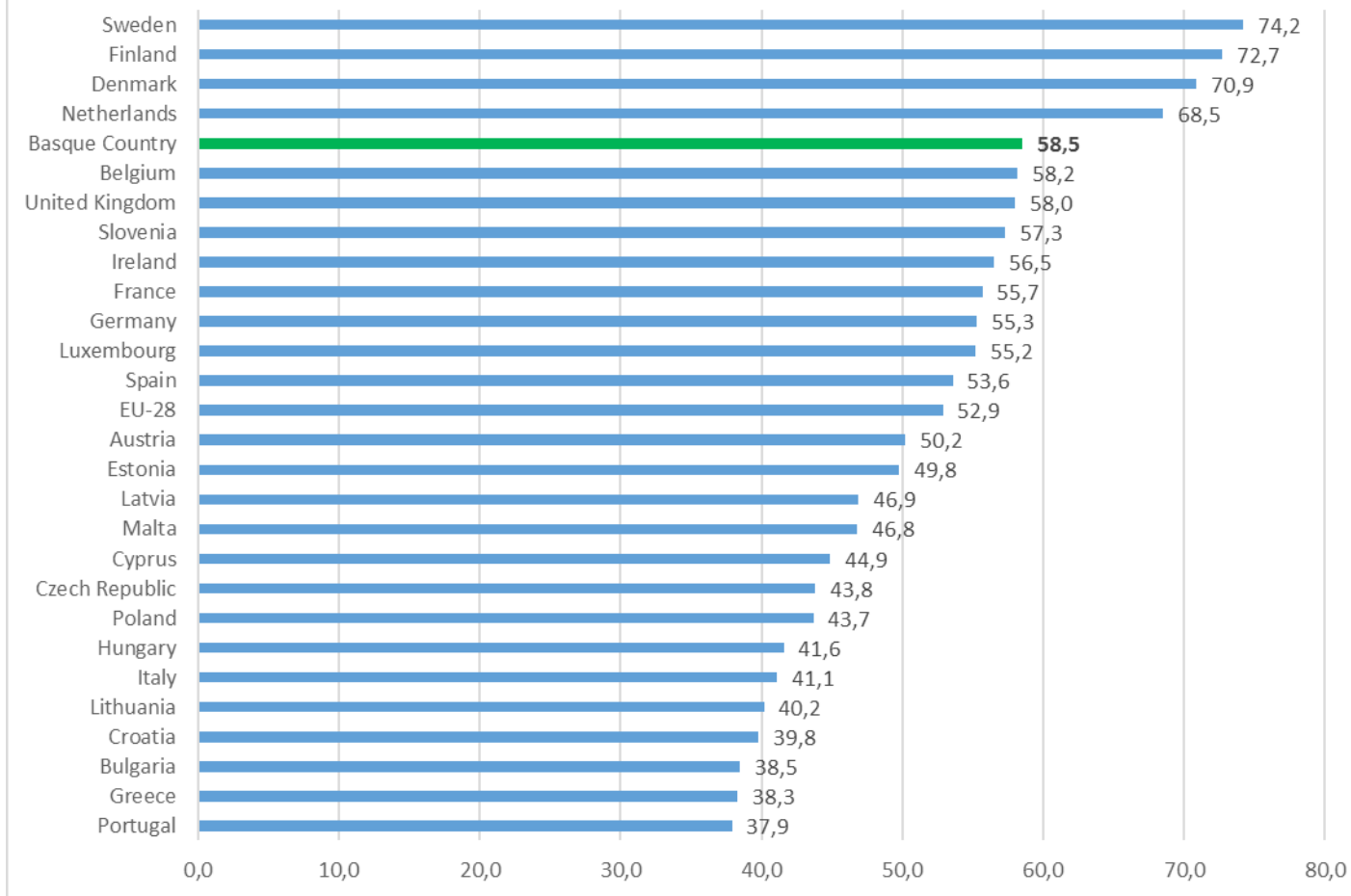
Source: INE

Last update: 2014

## Gini coefficient of equivalised disposable income in OCDE



## Gender equality index by dimension. 2012



Source: Eustat. Gender equality index 2012



# NEEDS OF TALENT AROUND THE WORLD

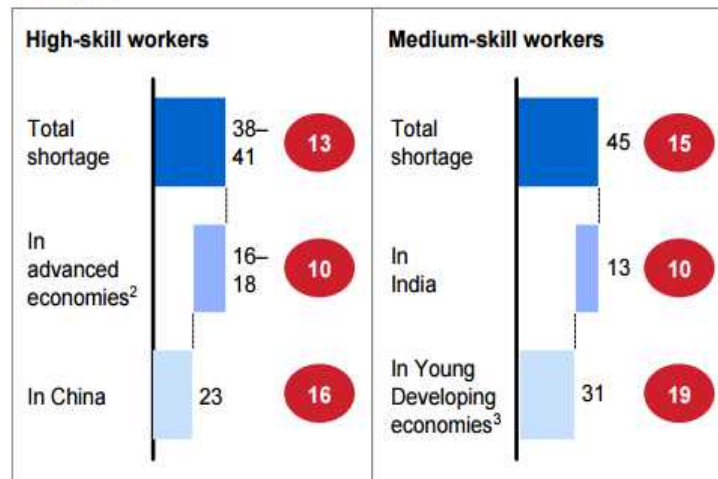
## Exhibit E1

### In the “momentum” case, the world is likely to have too few high-skill workers and not enough jobs for low-skill workers

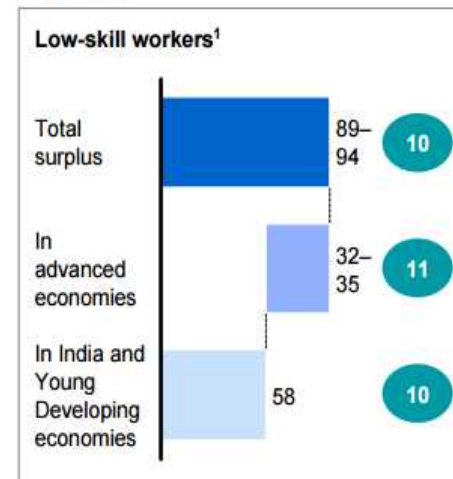
Gap between demand and supply of workers by educational attainment, 2020E  
Million workers

● % of supply of skill cohort  
● % of demand for skill cohort

#### Shortages



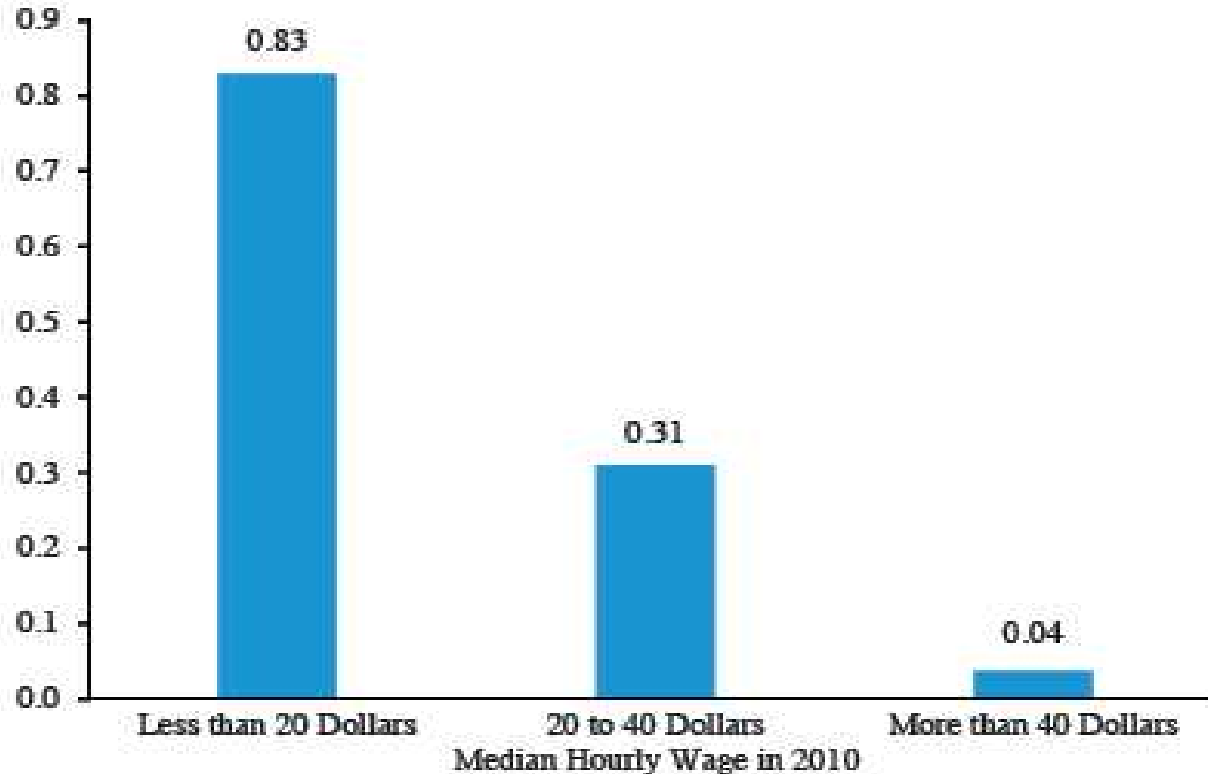
#### Surpluses



- 1 Low-skill defined in advanced economies as no post-secondary education; in developing, low skill is primary education or less.
- 2 25 countries from the analyzed set of 70 countries, that have GDP per capita greater than US\$ 20,000 at 2005 purchasing power parity (PPP) levels in 2010.
- 3 11 countries from the analyzed set of 70 countries, from South Asia and sub-Saharan Africa, with GDP per capita less than \$3,000 at 2005 PPP levels in 2010.

# WILL ROBOTS TAKE OUR JOBS?

Figure 5-15  
**Probability of Automation by an Occupation's Median Hourly Wage**  
Median Probability of Automation



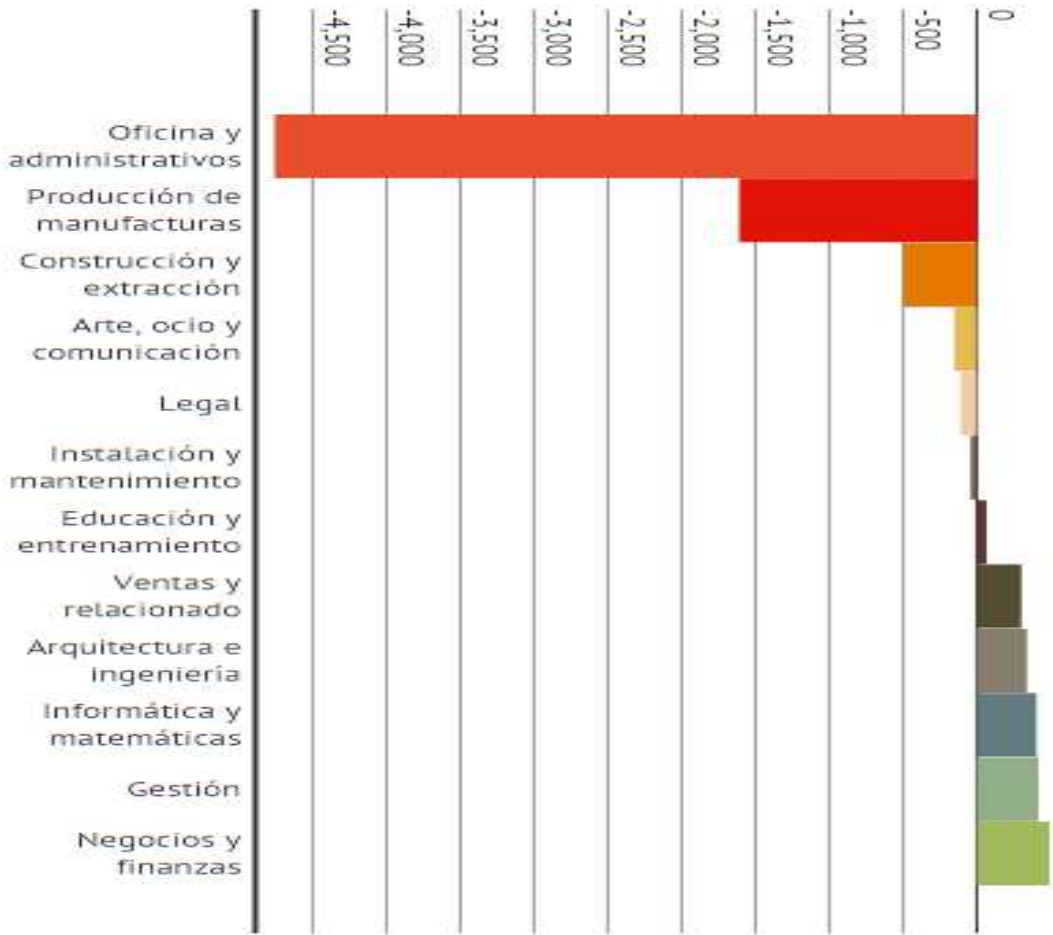
Source: Bureau of Labor Statistics; Frey and Osborne (2013); CEA calculations.

Robots Will Replace 5 Million Workers By 2020 according to World Economic Forum (Jan 2016)

# JOB AND MOBILITY

## Los trabajos que se crearán y se destruirán

Empleos (por mil) que se crearán y destruirán en cada industria, en todo el mundo



# JOB AND MOBILITY

**Puntuación media de las Tecnologías que sustituirán más Empleos/Trabajo de los que crearán para 2050**

<b>Tecnologías que sustituirán Empleos</b>	<b>Puntuación</b>
Robótica	7.51
Integración y sinergias entre estas tecnologías creando tecnologías desconocidas hoy en día	6.92
Inteligencia Artificial	6.81
Inteligencia Artificial general	6.47
Incapacidad de la recualificación para adaptarse a los cambios tecnológicos acelerados	6.43
Impresión 3D/4D	6.14
Otros factores	5.54
Drones	5.35
Nanotecnología	5.19
Biología Sintética	4.66

# JOB AND MOBILITY

## Factores que crearán más empleos evitando el desempleo masivo para 2050

Factores que crearán más empleos	Puntuación
Nuevos conceptos económicos y laborales	7.17
Auto-empleo, "freelancing", sistemas de apoyo "Hazlo tu mismo", incentivos, y formación	7.07
Crecimiento de nuevos empleos en ocio, recreación e industrias de la salud	6.67
Libertad para crear nuevo trabajo para hacer que la vida valga la pena más allá del trabajo "necesario"	6.28
La creatividad humana se acelerará a lo largo del mundo	6.25
Otras tecnologías podrían crear más empleos de los que sustituyen	6.14
Simbiosis humano-tecnología y/o realidad aumentación	5.95
Crowd sourcing para finanzas (Kickstarter) y trabajo basado en crowd sourcing	5.61
Revolución Biológica (biología sintética y otras industrias relacionadas con la nueva biología)	5.42
Auto-corrección: a medida que el paro sube, el consumo baja reduciendo el crecimiento de los sistemas robóticos de IA, y sustituyendo menos empleos	4.12

# JOB AND MOBILITY

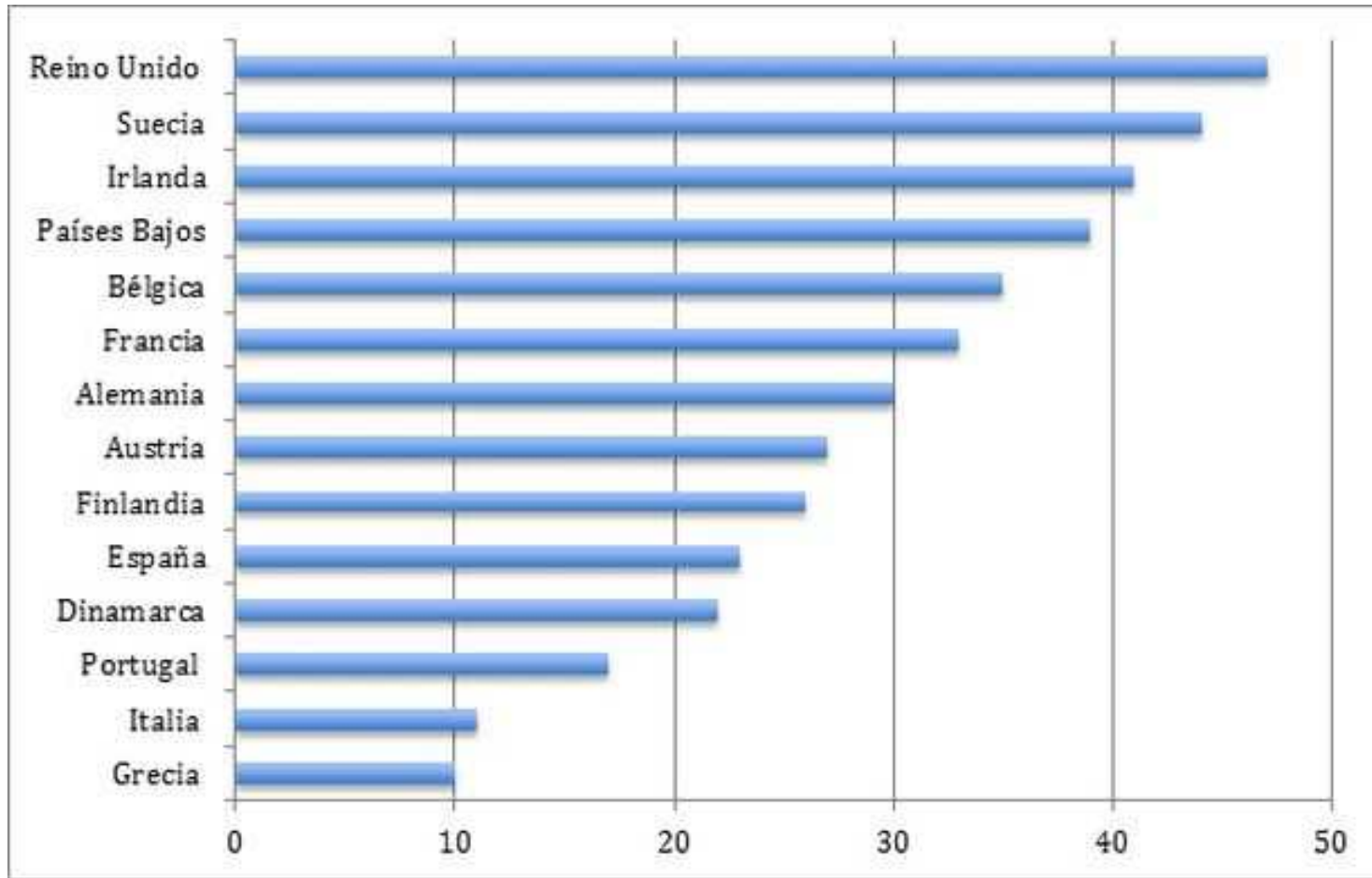
Cuadro nº 11. CAMBIO ESPERADO DEL EMPLEO POR SECTORES Y ESTUDIOS  
2013-2025 (ESPAÑA)

(en %)

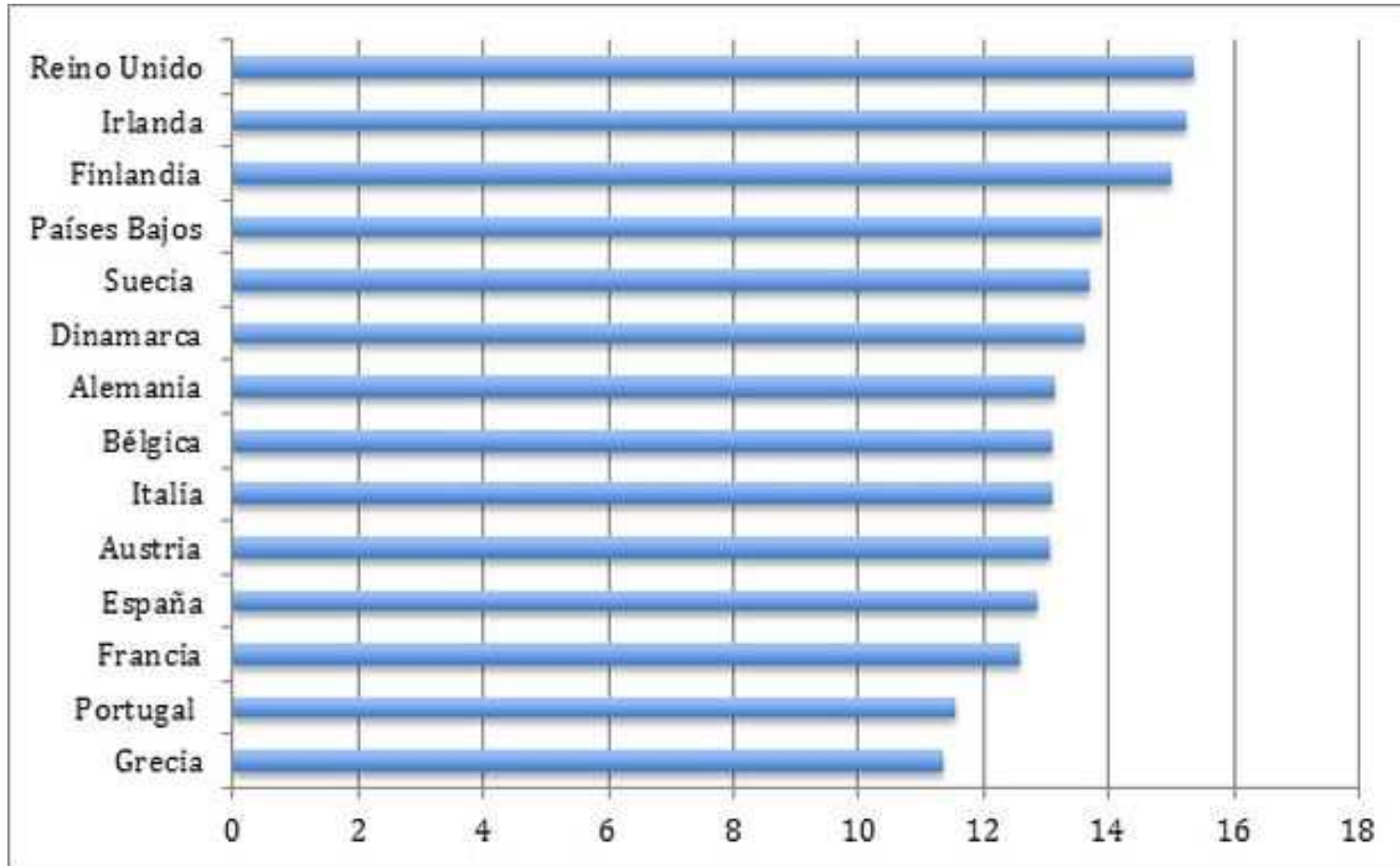
	Nivel alto de educación (2013-2025)	Nivel medio de educación (2013-2025)	Nivel bajo de educación (2013-2025)
Sector primario	49	52	-44
Agricultura, silvicultura y pesca	74	59	-50
Minas y canteras; electricidad, gas, vapor y aire acondicionado; suministro de agua, actividades de saneamiento, gestión de residuos y descontaminación	19	35	-6
Construcción	55	7	-44
Fabricación	29	11	-45
Distribución y transporte (comercio al por mayor y al por menor; reparación de vehículos de motor y motocicletas; transporte y almacenamiento; y actividades de hostelería)	65	47	-33
Negocios y otros servicios	33	37	-40'
Información y comunicación	15	-30	13
Actividades financieras y de seguros	13	-36	-46
Actividades inmobiliarias	25	29	-25
Servicios profesionales, científicos y técnicos; actividades administrativas y servicios auxiliares y otras actividades de servicios	29	44	-34
Administración Pública y defensa; Seguridad Social; Educación; Actividades sanitarias y de servicios sociales	1	-7	-41
Actividades de los hogares como empleadores; actividades no diferenciadas de producción de bienes y servicios de hogares para uso propio	69	53	-54

Fuente: Panorama de cualificaciones.

## Porcentaje de universitarios entre no nacionales de más de 24 años y menos de 65 que llegaron en los últimos 10 años (2009-2013)



## Años medios de educación de los extranjeros en las muestras nacionales de la Encuesta Social Europea (2010-2014)



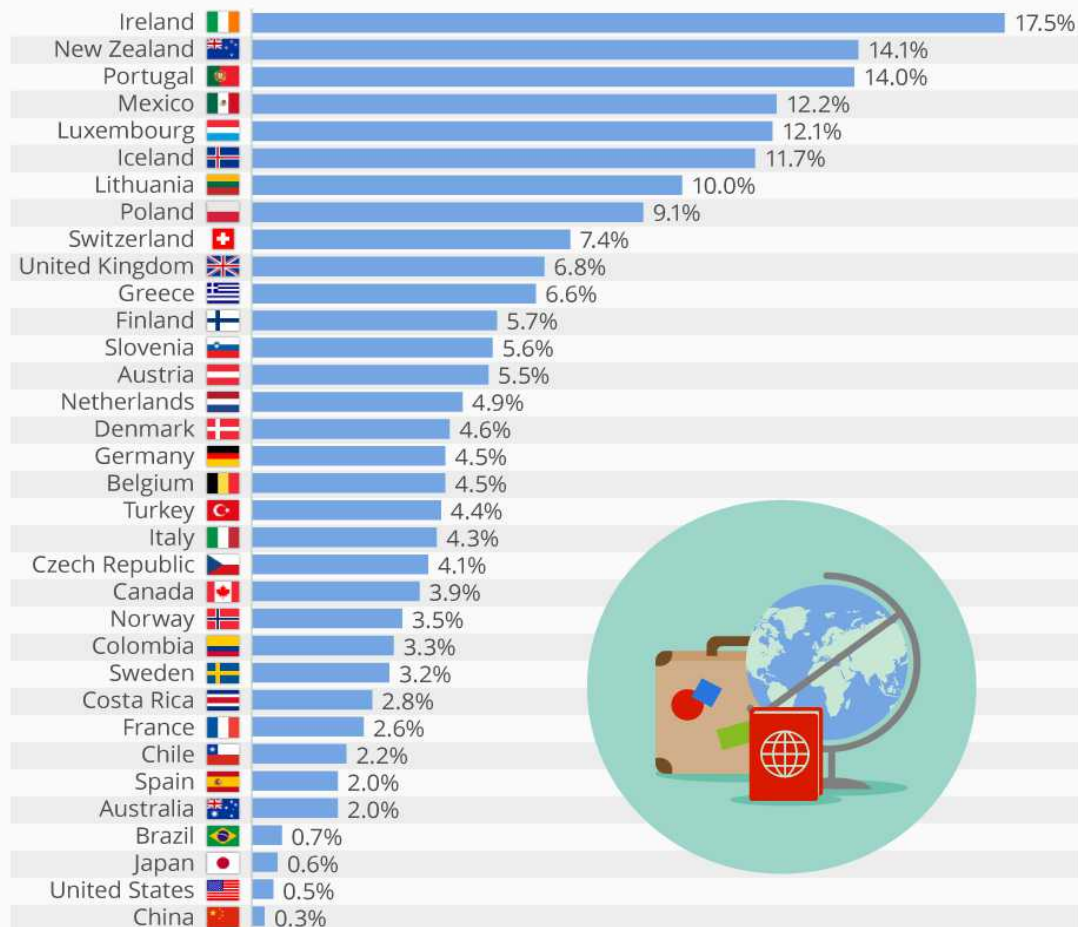
Fuente: Encuesta Social Europea (2010-2014). Años predichos en modelos jerárquicos con constante aleatoria controlando por edad y sexo.



# JOB AND MOBILITY

## The Countries With The Most People Living Overseas

Percentage of the native-born population living abroad in 2014



SOURCE : OCDE 2015



Source: OECD

Forbes statista

bizkaia  
::talent



## EU Member States

Number of citizens living outside their home country

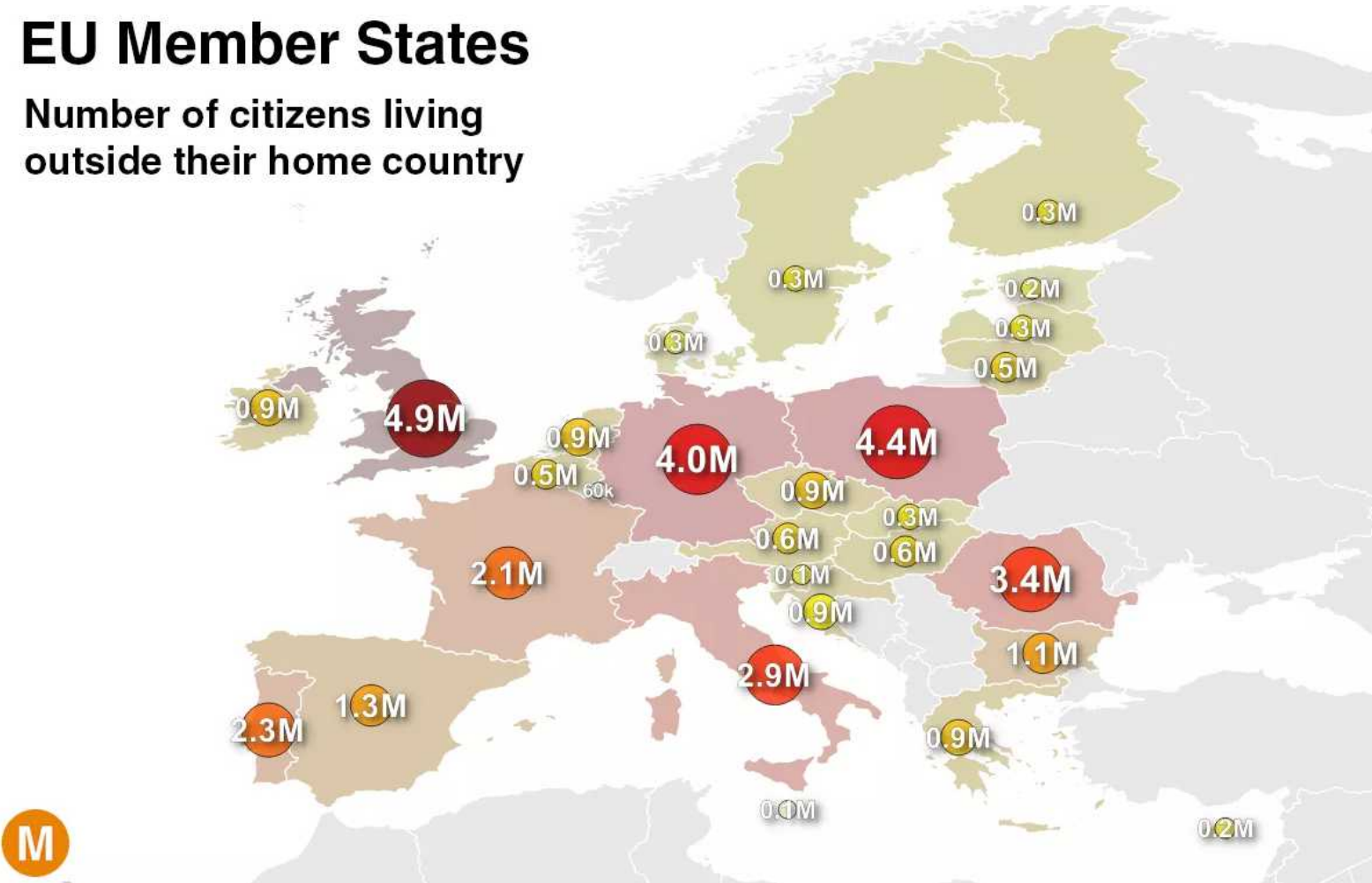
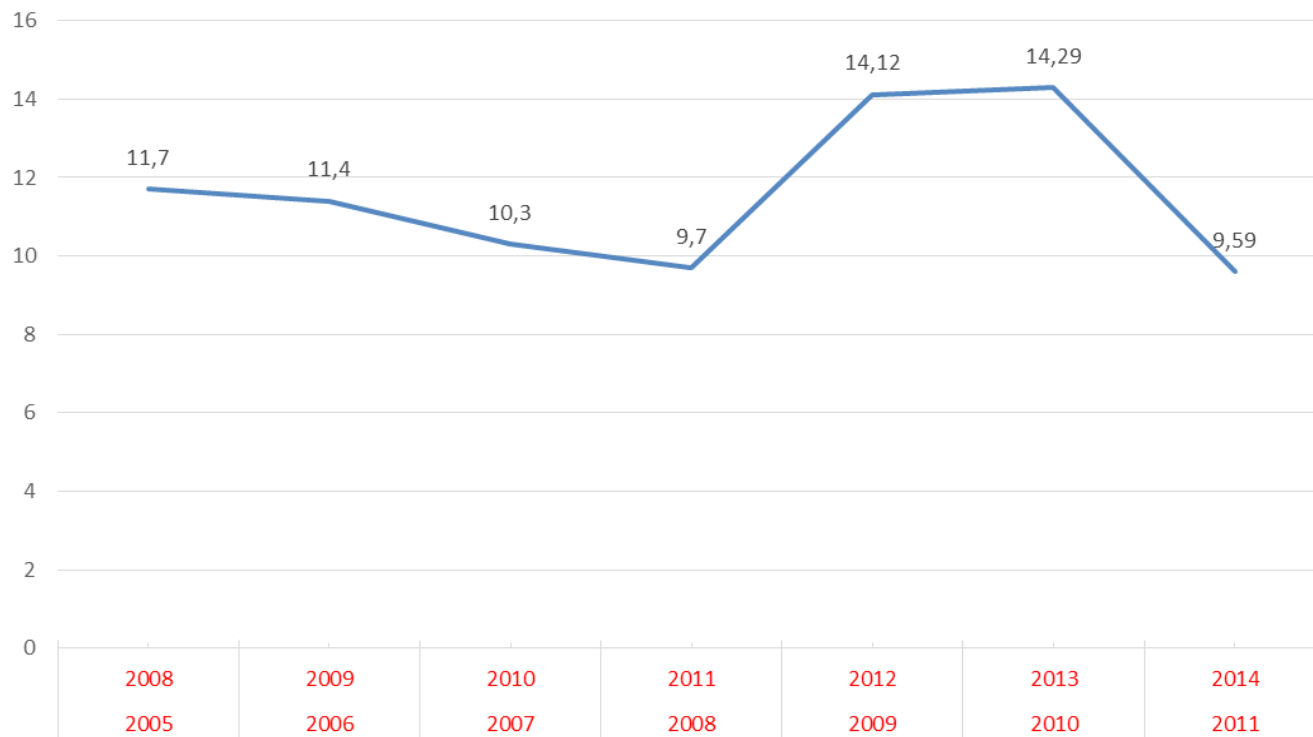


Image: metrocosm.com; U.N. Population Division. Includes all citizens living anywhere in the world

# TALENT MOBILITY REPORT

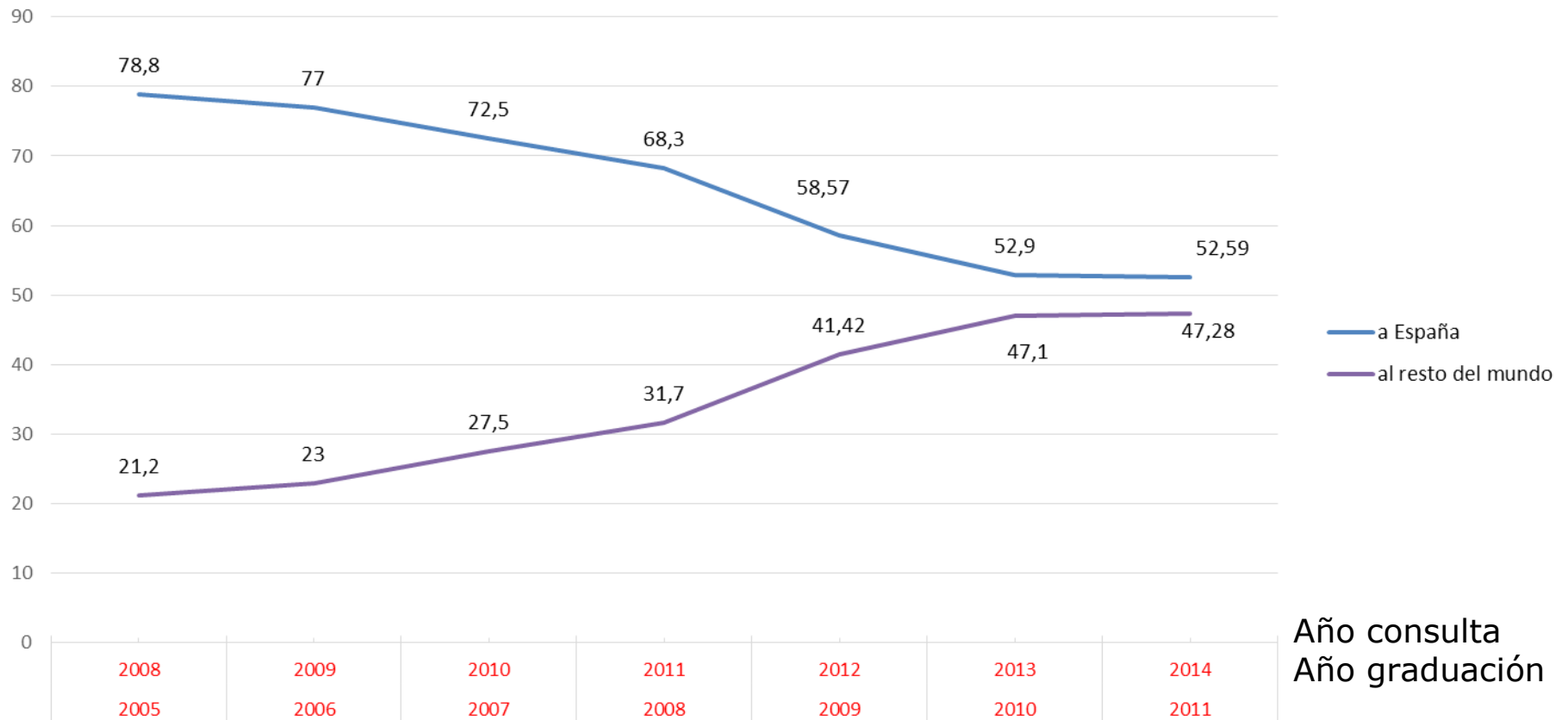
## MOVILIDAD EXTERIOR GENERAL



Año consulta  
Año graduación

# TALENT MOBILITY REPORT


## % De distribución de los Egresados Vascos que trabajan fuera de Euskadi



Año consulta  
Año graduación

# YOUR LIFE'S DISTRIBUTION

From 0 to 25  
years old  
Learning



# YOUR LIFE'S DISTRIBUTION

From 0 to 25  
years old  
Learning

From 25 to 70 years old  
Working and Learning



# YOUR LIFE'S DISTRIBUTION

From 0 to 25  
years old  
Learning

From 25 to 70 years old  
Working and Learning

From 70 to..  
.....

# YOUR LIFE'S DISTRIBUTION

From 0 to 25  
years old  
Learning

From 25 to 70 years old  
Working and Learning

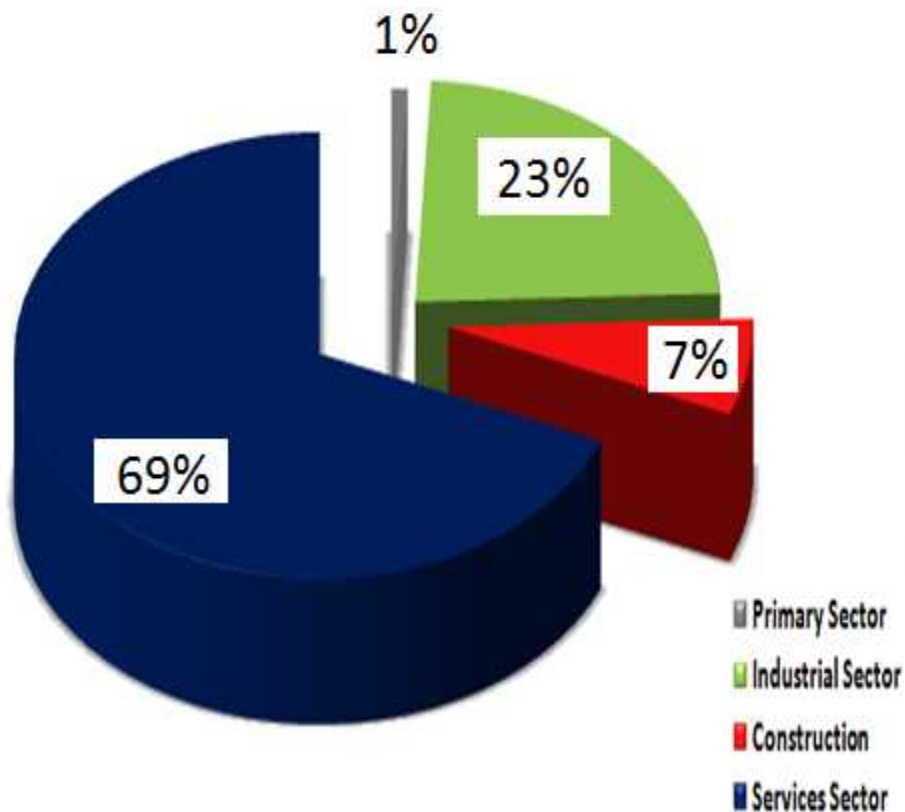
From 70 to..  
.....

From 25 to 30  
years old  
Learning and  
getting special  
experiences

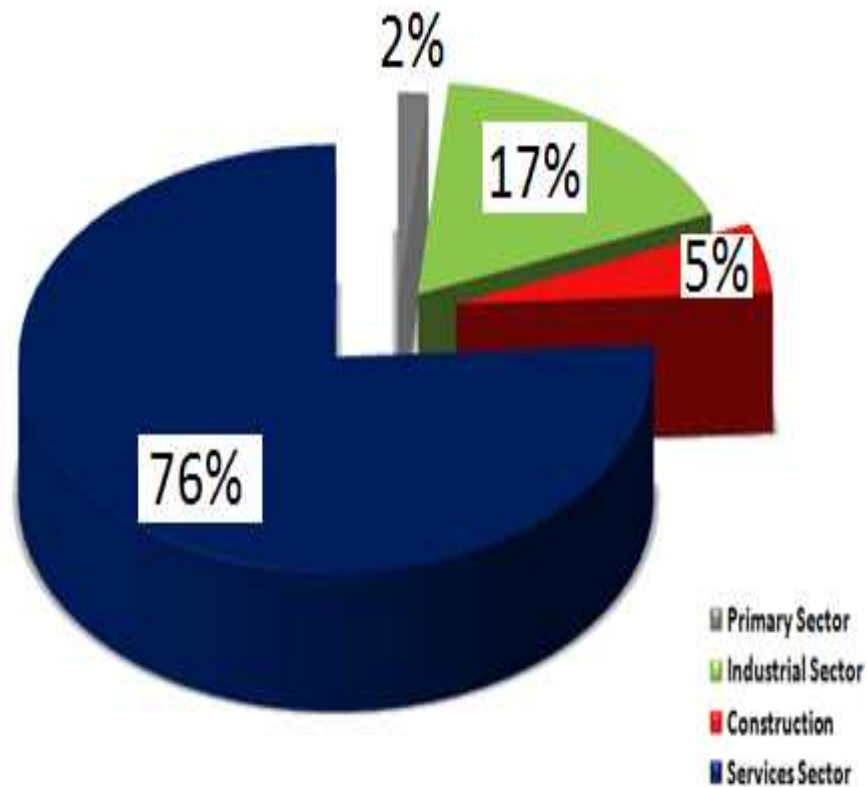


# Socio-economic structure. Gross Value Added by Sector (%)

## Basque Country



## EU-27

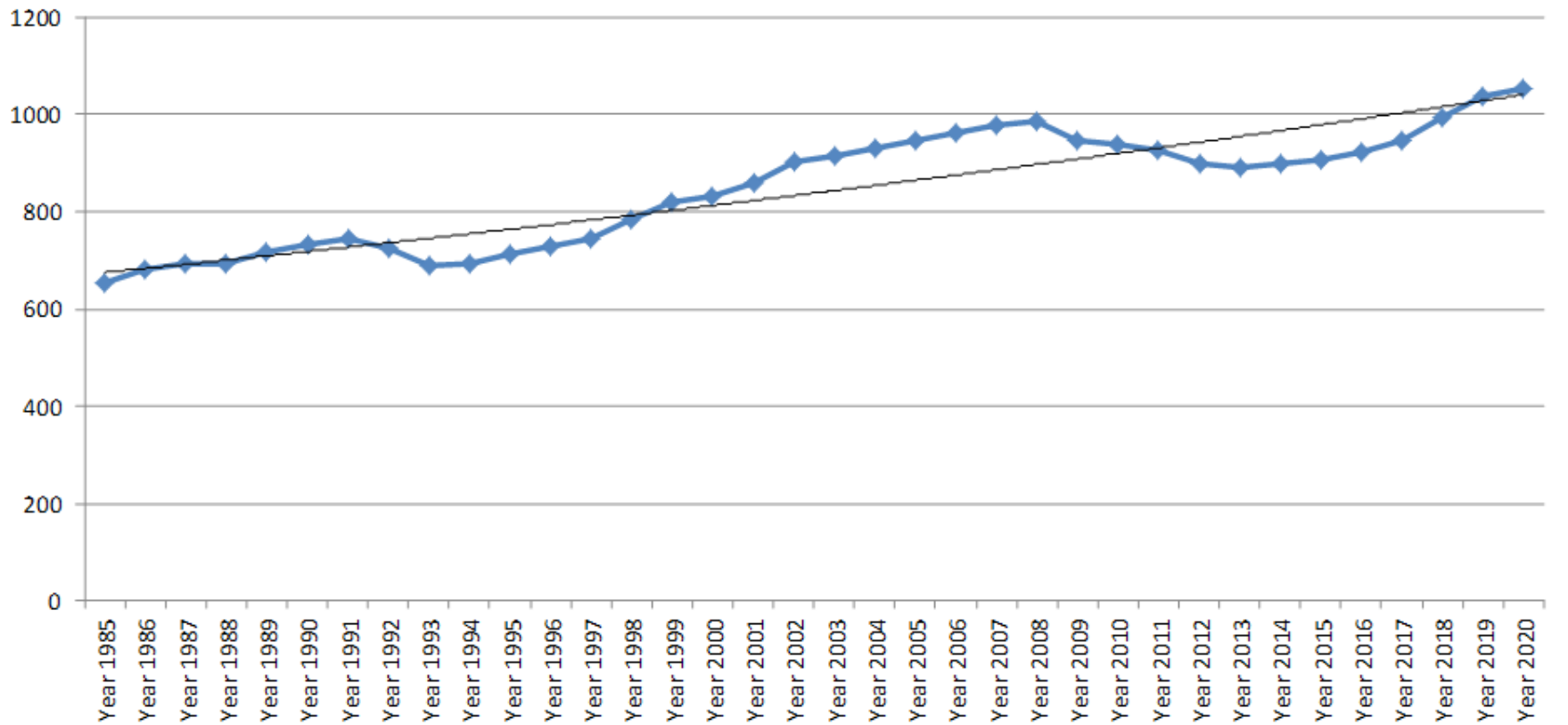


Source: EUSTAT, OECD

Last update: EUSTAT 2013, OECD 2013

Considering the scenarios established by different institutions, we can estimate a plausible scenario where we are at a inflection point in the destruction of employment, and that gradually the job creation process will recuperate by 2020

### Evolution of the number of employed people, and forecasts as of 2014 (included). Basque Country



# Evolution of the weight of university graduates in the labor market

UNIVERSITY GRADUATES IN EACH KNOWLEDGE AREA, EMPLOYED IN THE SECTOR, FOR EVERY 1000 INDIVIDUALS IN THE TOTAL JOB MARKET

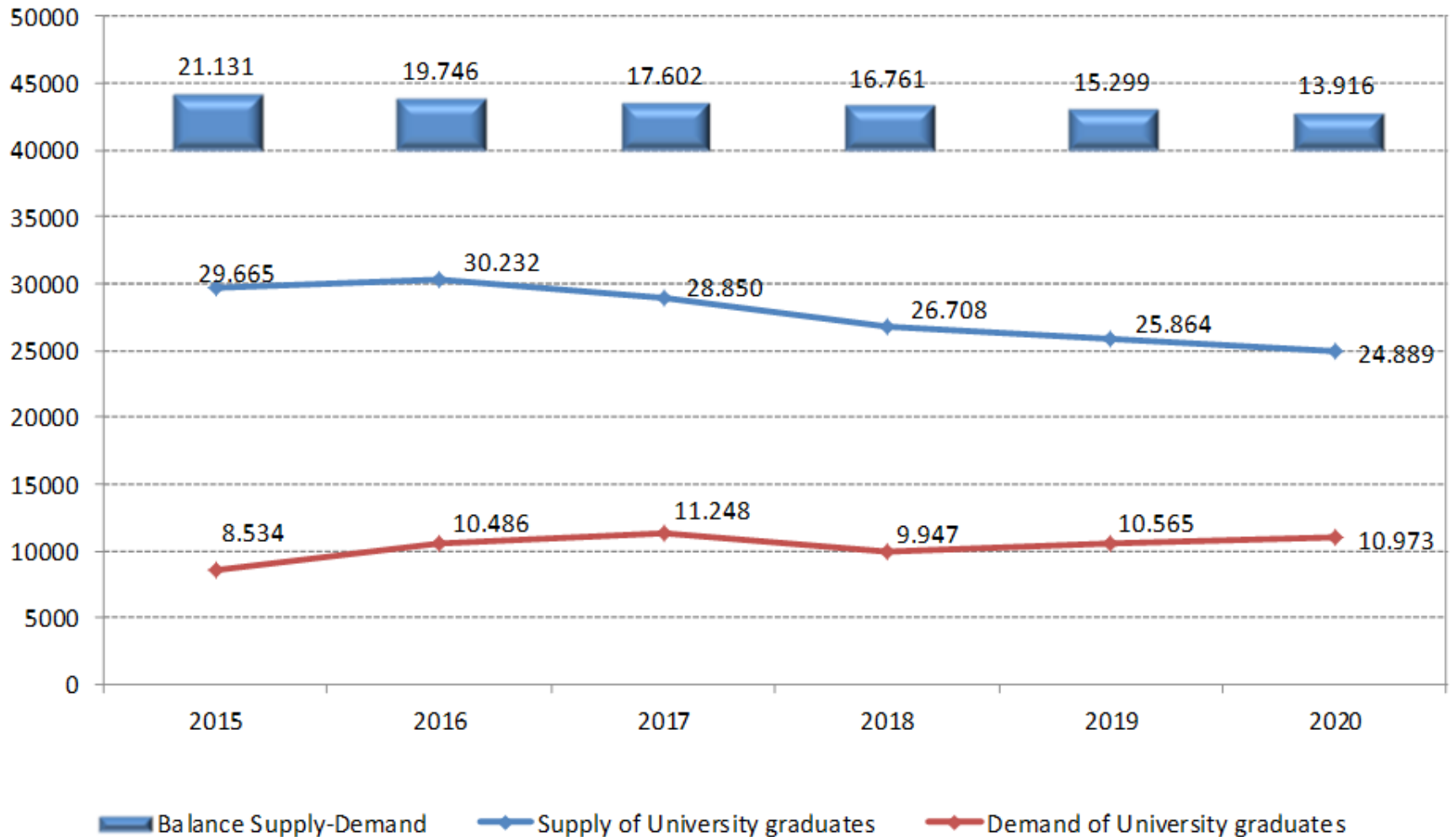
Thousands of individuals	2001						2011					
	PRIMARY /EXTRACTIVE	INDUSTRY	CONSTRUCTION	COMMERCE AND BUSINESS SERVICES	OTHER SERVICES	TOTAL	PRIMARY/EXTRACTIVE	INDUSTRY	CONSTRUCTION	COMMERCE AND BUSINESS SERVICES	OTHER SERVICES	TOTAL
Technical	0.97	20.06	3.85	20.79	6.97	52.64	1.09	25.68	7.00	30.68	13.91	78.36
Social and legal	0.43	16.56	1.84	49.53	51.18	119.54	0.32	14.25	2.95	56.56	77.85	151.94
Humanities	0.20	1.66	0.28	5.28	16.20	23.61	0.01	1.60	0.13	6.11	20.81	28.65
Healthcare	0.15	1.11	0.06	3.17	22.34	26.84	0.00	0.83	0.03	7.30	32.48	40.63
Experimental	0.14	2.63	0.13	3.91	4.93	11.74	0.36	2.56	0.07	6.60	5.62	15.20
Total	1.88	42.01	6.16	82.68	101.62	234.36	1.77	44.91	10.18	107.26	150.67	314.79

ESTIMATE OF UNIVERSITY GRADUATES IN EACH KNOWLEDGE AREA, EMPLOYED IN THE SECTOR, FOR EVERY 1000 INDIVIDUALS EMPLOYED IN THE TOTAL JOB MARKET BY YEAR  
2020

Thousands of individuals	PRIMARY/ EXTRACTIVE	INDUSTRY	CONSTRU CTION	COMMERCE AND BUSINESS SERVICES	OTHER SERVICES	TOTAL
Technical	1.01	32.78	9.97	43.18	20.14	107.08 (+37,57%)
Social and legal	0.72	16.14	5.75	63.04	101.88	187.54 (+23,43)
Humanities	0.00	1.83	0.31	9.81	27.79	39.75 (+38,64%)
Healthcare	0.01	0.47	0.01	11.15	43.85	55.49 (+36,57%)
Experimental	0.76	3.10	0.24	8.73	7.77	20.60 (+35,52%)
Total	2.50	54.33	16.29	135.90	201.43	410.45 (+30,38%)

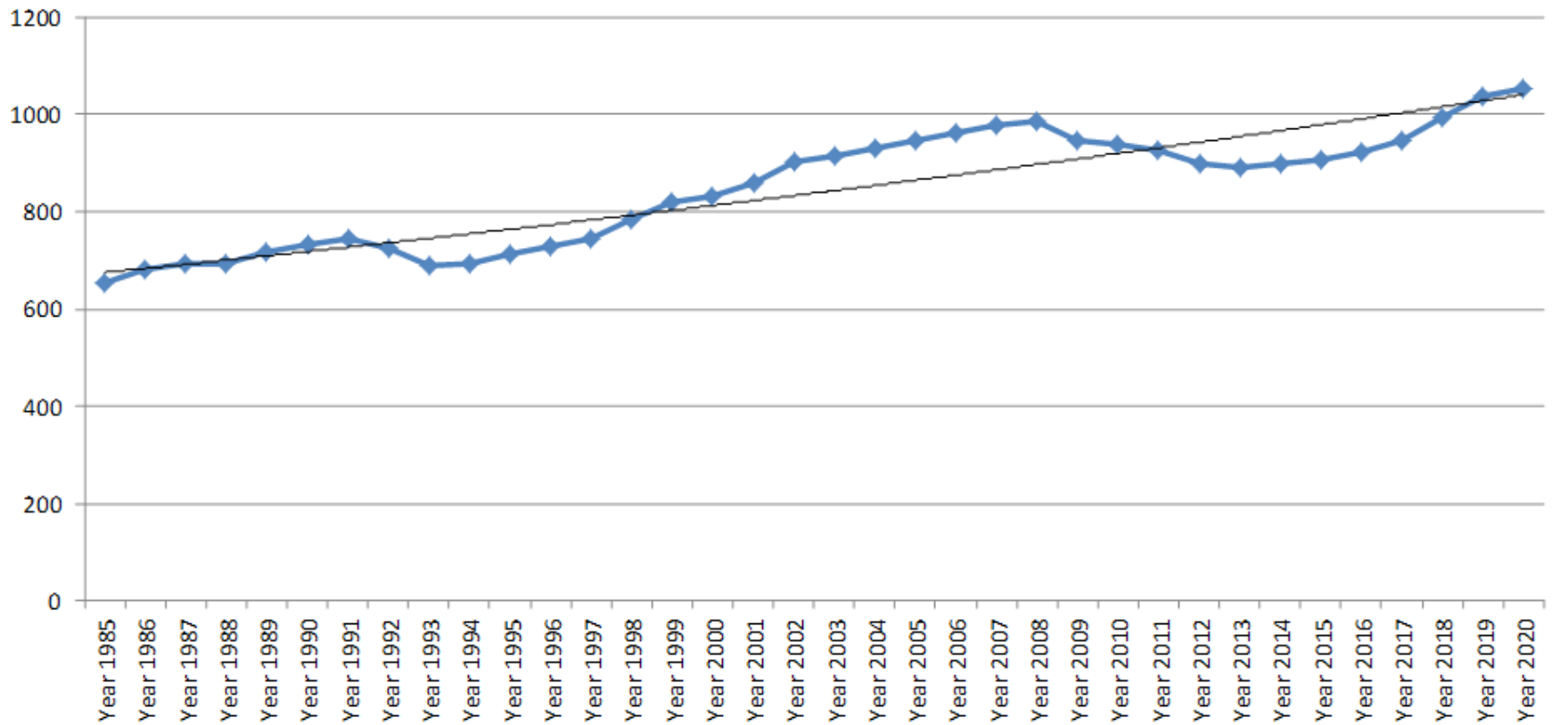
# Estimate of the offer/demand of university graduates in 2020: 1-Conservative scenario

## Projection of supply/demand total university graduates



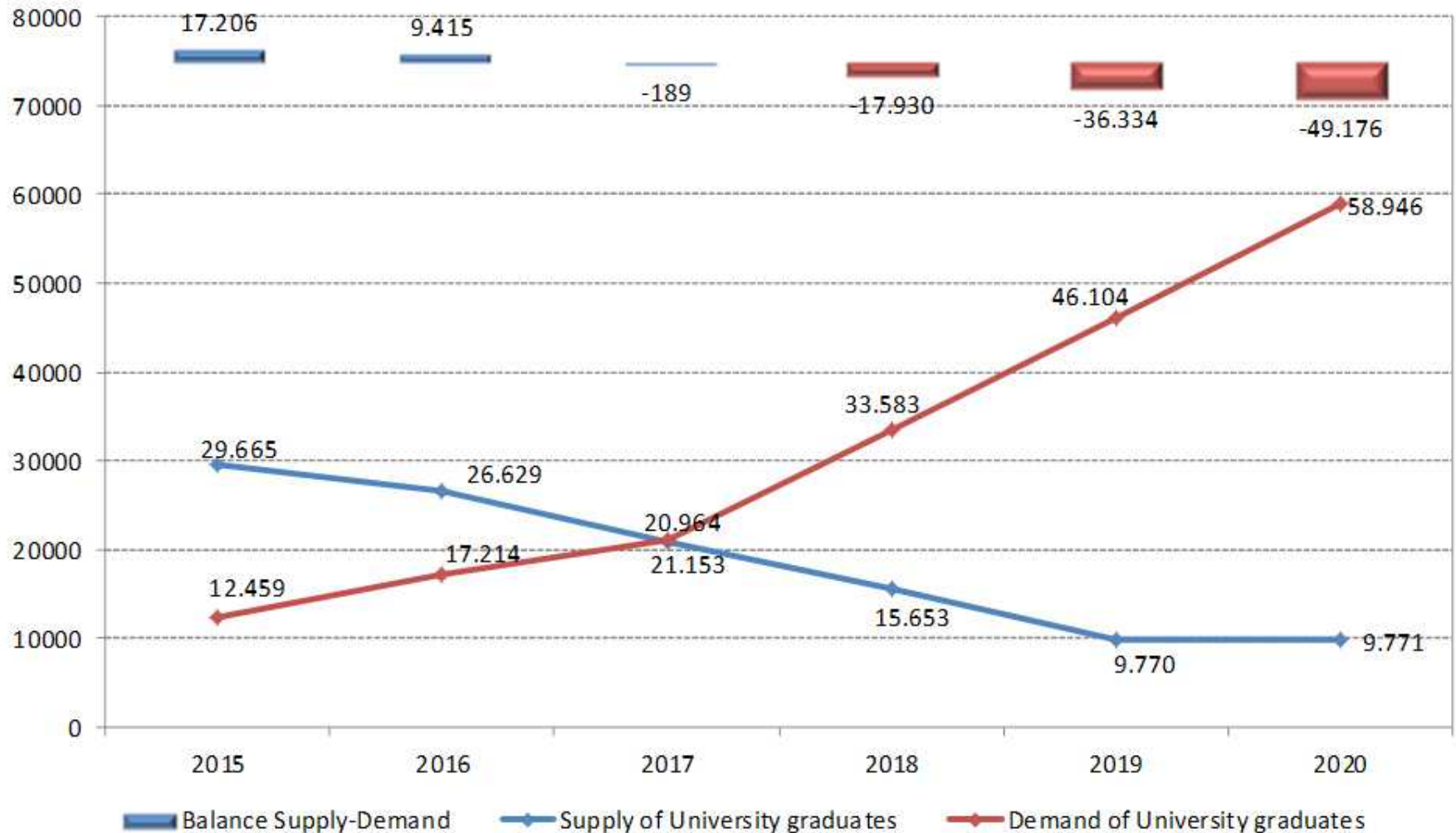
Considering the scenarios established by different institutions, we can estimate a plausible scenario where we are at a inflection point in the destruction of employment, and that gradually the job creation process will recuperate by 2020

### Evolution of the number of employed people, and forecasts as of 2014 (included). Basque Country



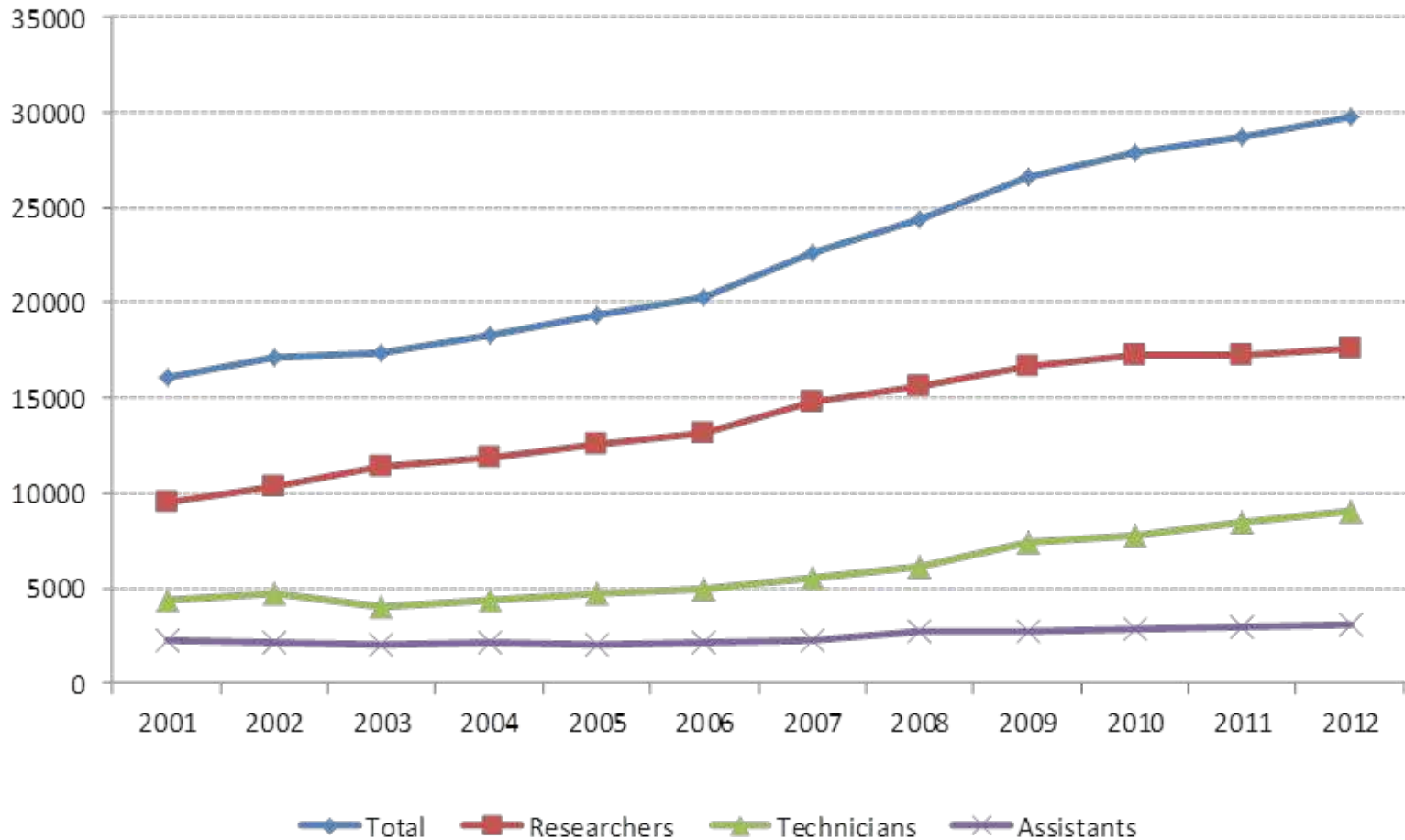
## 2. Growth scenario in employment in the Basque Country

### Projection of supply/demand total university graduates



# REAL FIGURES ABOUT THE EVOLUTION OF R+D PERSONNEL IN THE LAST YEARS

## Yearly change total R+D personnel in the Basque Country



Source: own creation from Eustat's figures

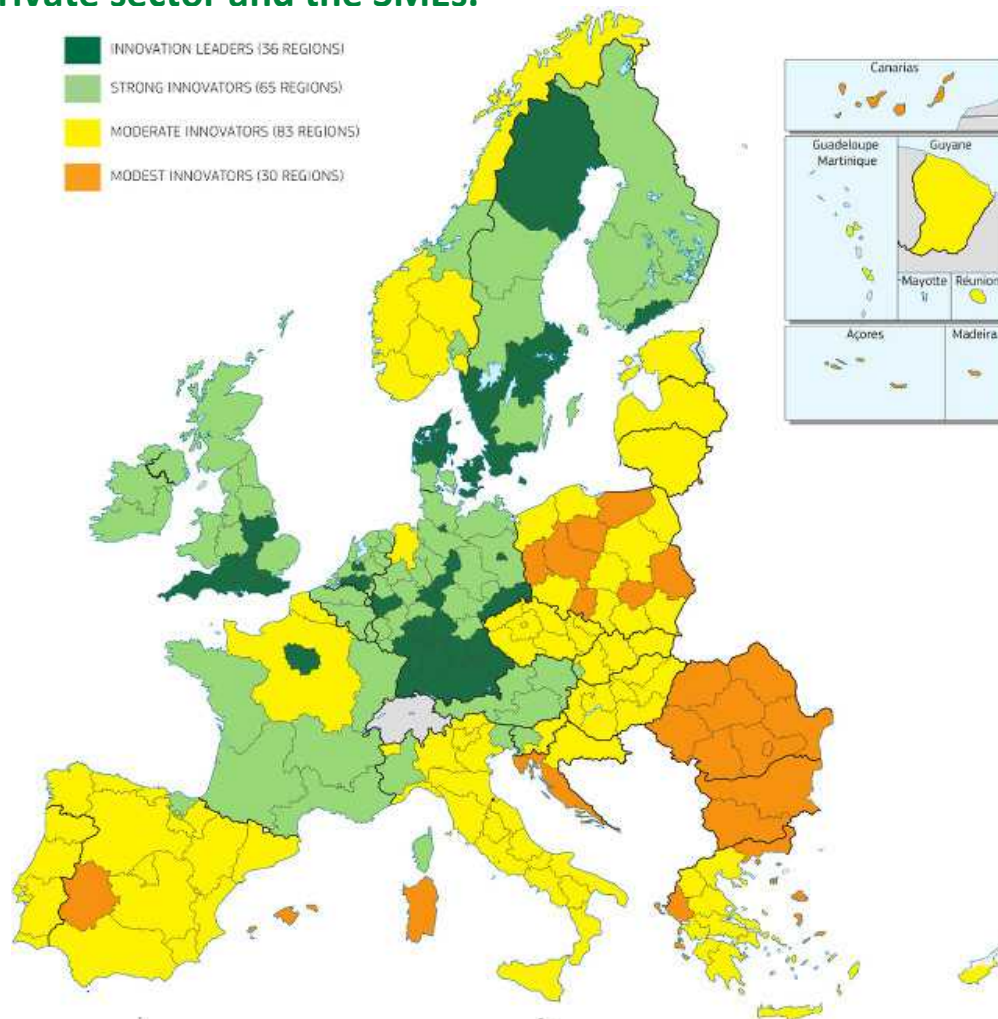


# Basque Country one of the Innovation Follower Regions in Europe

The Basque Country stands out in nearly all the parameters, above all in the volume of R&D investment in the private sector and the SMEs.

→ This is stated in the Regional Innovation Scoreboard 2016, published by the Commission, on the evolution of R&D investment in the EU. A ranking which praises the role of the Basque Country.

→ The Basque Country is ranked together with regions such as Dublin Area, Edimburgh area, Alsace, Piedmont or Vienna.



Source: European Commission Report.

Last update: European Commission:

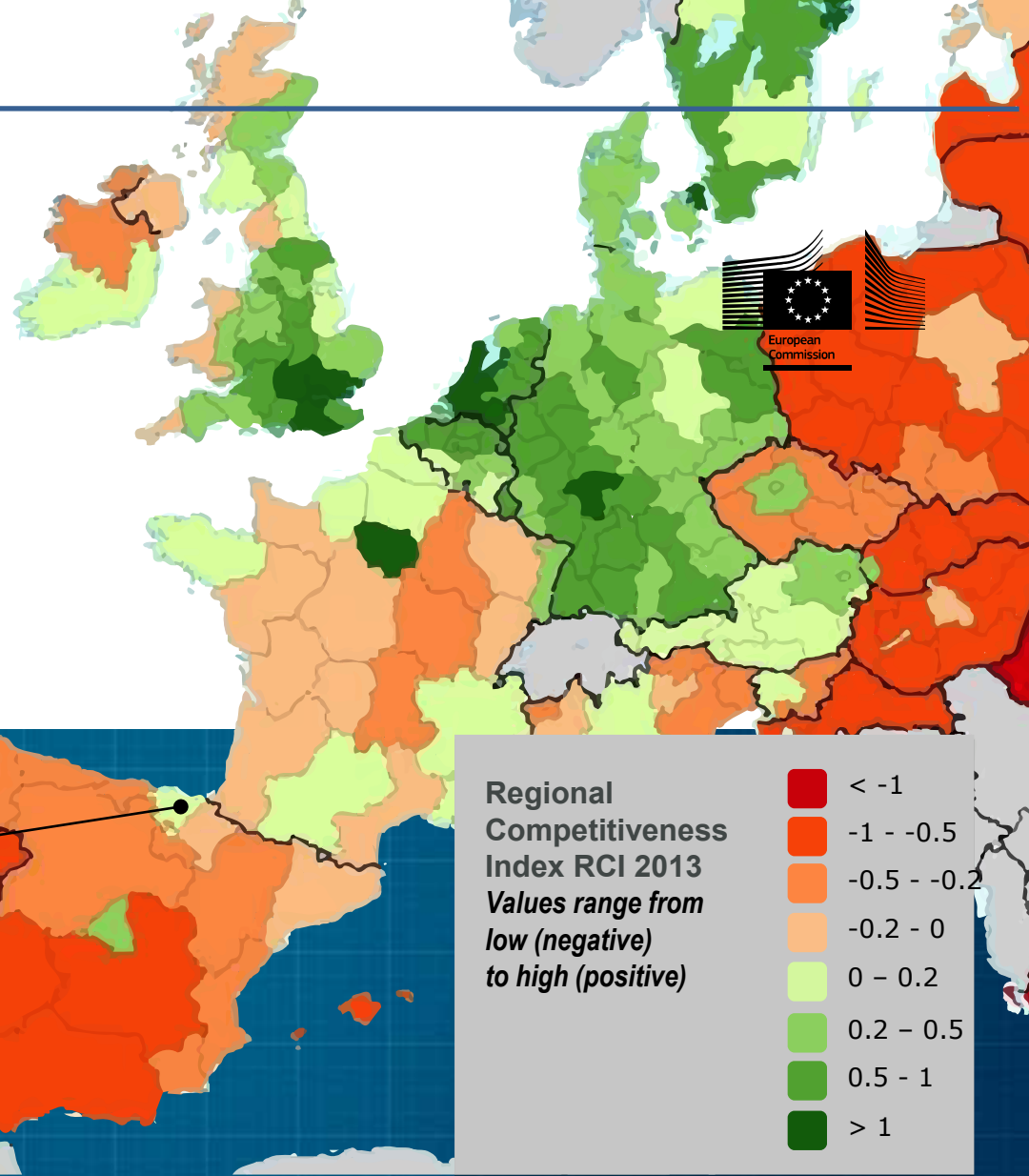
Regional Innovation Scoreboard 2016.

## EU Regional Competitiveness Index RCI 2013

Source: *European Commission (Eurostat)*

The Basque Country is a region that continues **being competitive** in spite of the virulence and persistence of the economic crisis, unlike practically all of the Spanish State

**Basque Country**  
**0.175 (2013)**

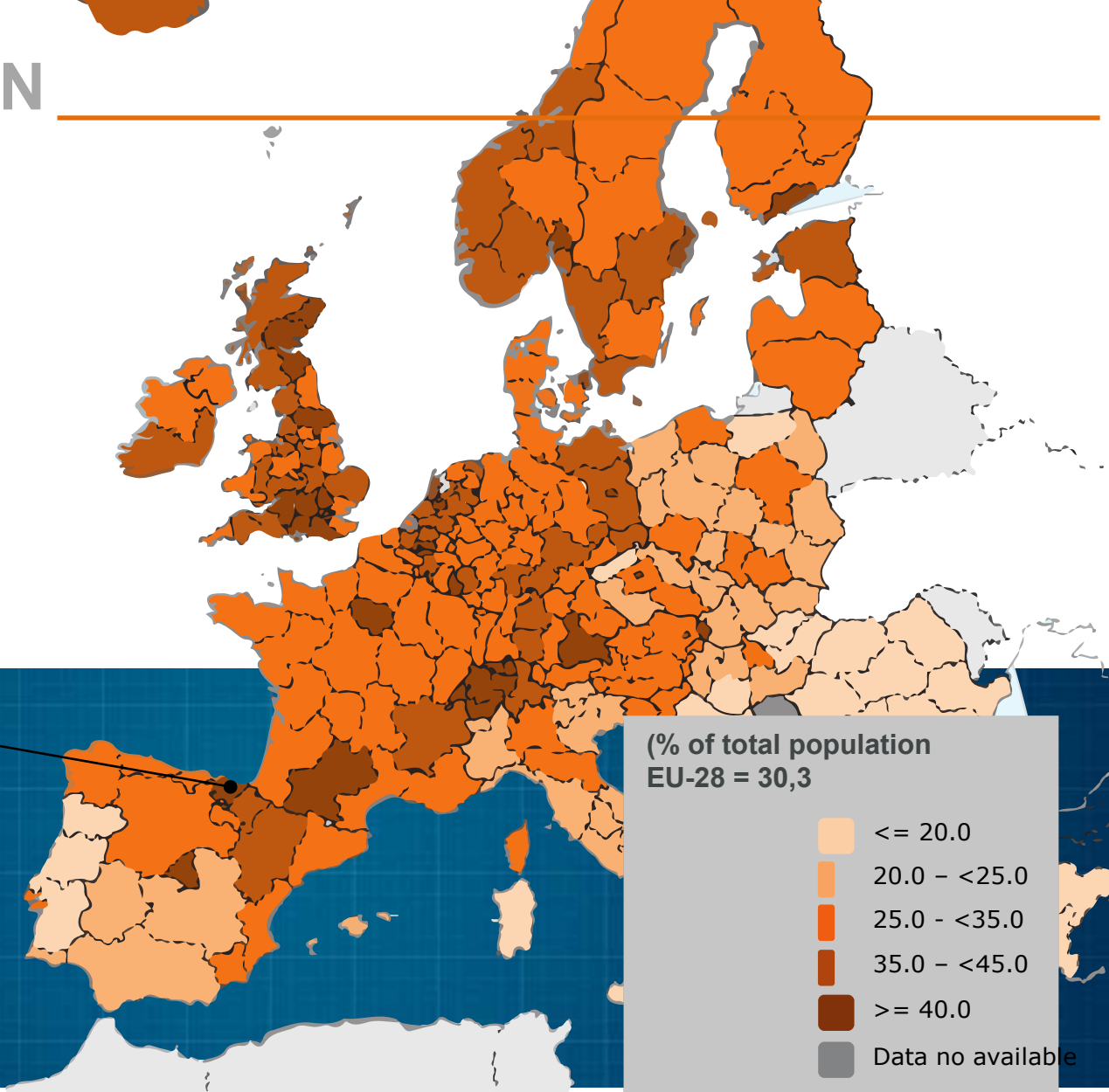


## R&D+i System

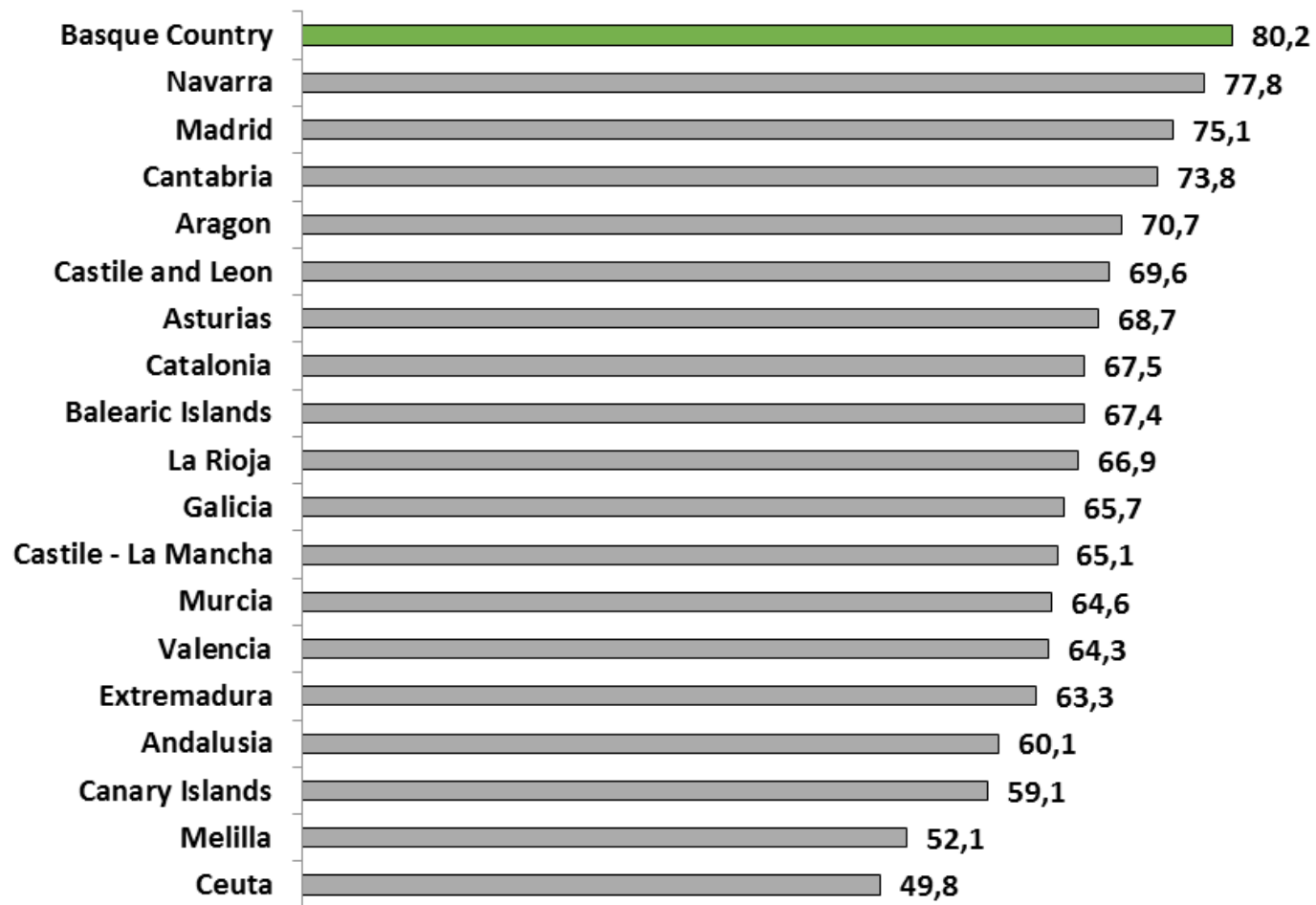
### People

Human resources in science and technology (HRST), by NUTS 2 regions, 2012 (1)  
(% of total population)

**Basque Country 41%**  
EU28 30,3%



# TOTALS



Source: OECD REGIONAL WELL-BEING INDICATORS

Last update: July 2016

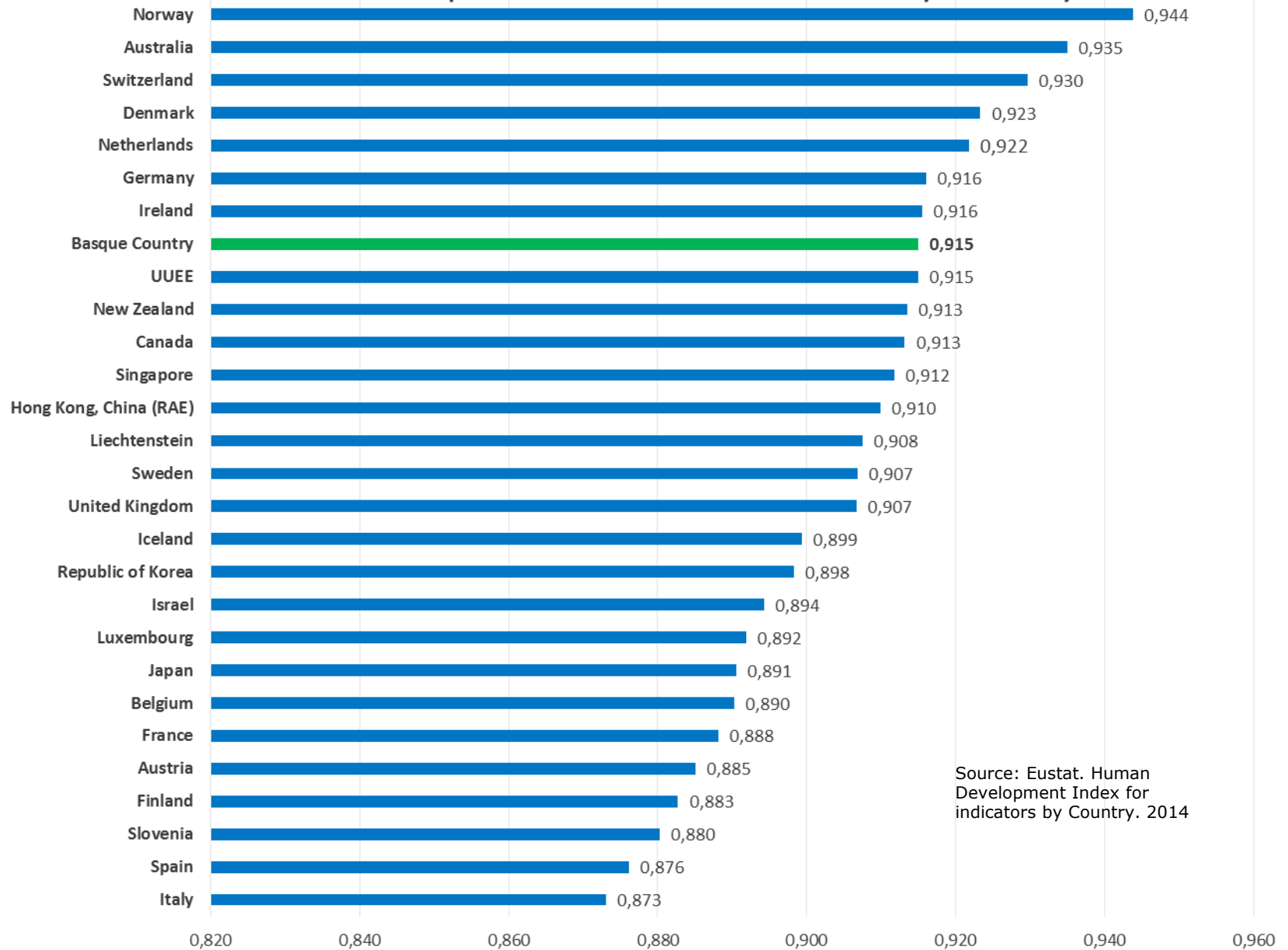
# TOTALS



Source: OECD REGIONAL WELL-BEING INDICATORS

Last update: July 2016

# Human Development Index for indicators by country. 2014



Source: Eustat. Human Development Index for indicators by Country. 2014