

BASQUE TALENT EVOLUTION & TRENDS



2022

REPORT ON EVOLUTION AND
TRENDS IN THE MANAGEMENT OF HIGHLY
QUALIFIED TALENT IN THE BASQUE COUNTRY

BASQUE TALENT EVOLUTION & TRENDS 2022

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NEW WAYS OF WORKING AFTER COVID-19

Last year we talked about the before and after of the arrival of Covid-19 in our lives. Suddenly everything came to a standstill and everything we knew was turned upside down by the disease and the health restrictions, confinements, quarantines and a long etcetera in an effort to contain the spread of the virus. As we explained at the time, the paralysis of people's mobility had a major impact on the attraction of international profiles. The fact is that we are social beings and we need this personal interaction to relate to each other, develop business and take steps towards building the future to which we aspire.

A study from the Harvard Kennedy School's Growth Lab shows the relationship between business travel and industry growth. We must not forget that, without business travel, many companies would not survive, or it would be a much greater effort, affecting their financial health and sustainability. According to Braintrust's forecast, business travel will reach pre-pandemic levels by 2025. But even if such a forecast were to be achieved, the causes and circumstances of travel would be affected at the business level.

Part of this change in habits will be defined by a growing environmental awareness, but we should also not overlook the impact of the new ways of working that companies are incorporating, mainly teleworking.

The debate about telework continues to rage on all sides where it can have an effect.

Many cities and territories are on the hunt for the teleworker and the digital nomad. Tradition talent *hubs* and countries traditionally at the technological forefront are beginning to feel the "flight" of highly qualified professionals to other parts of the world that are more welcoming, closer to nature or more exotic (because of their climate, leisure and cultural options, lifestyle in line with their own values, etc.), even if these professionals continue to work remotely for companies in their own country. This is also a major challenge for the respective tax agencies, which seek to help attract such professionals through tax benefits designed for them, without falling into a balance offer or breaking the tax system for the rest of the taxpayers in the area.

Work-life balance is also an area that has been affected by teleworking. In these circumstances, where the pandemic is still more than ever present in our lives, working from home has gone from being a tool for work-life balance to being, in some cases, a problem. This is particularly visible for employees who have to combine work and childcare or who have to adapt to different time zones, or when working hours are blurred to such an extent that it is difficult to distinguish between work and private life.

In this sense, models such as the Mullenweg pyramid, by Wordpress founder Matt Mullenweg, can help companies to better understand and invite us to think about

how to design and propose an effective working system, not only in a teleworking environment, but also in an asynchronous digital environment.

It seems that, if we look around, many of the organisations that have implemented telework operate on a defined level 2 scheme. On the other hand, the level 5 proposed by Mullenweg is not applicable to all types of organisations and positions.

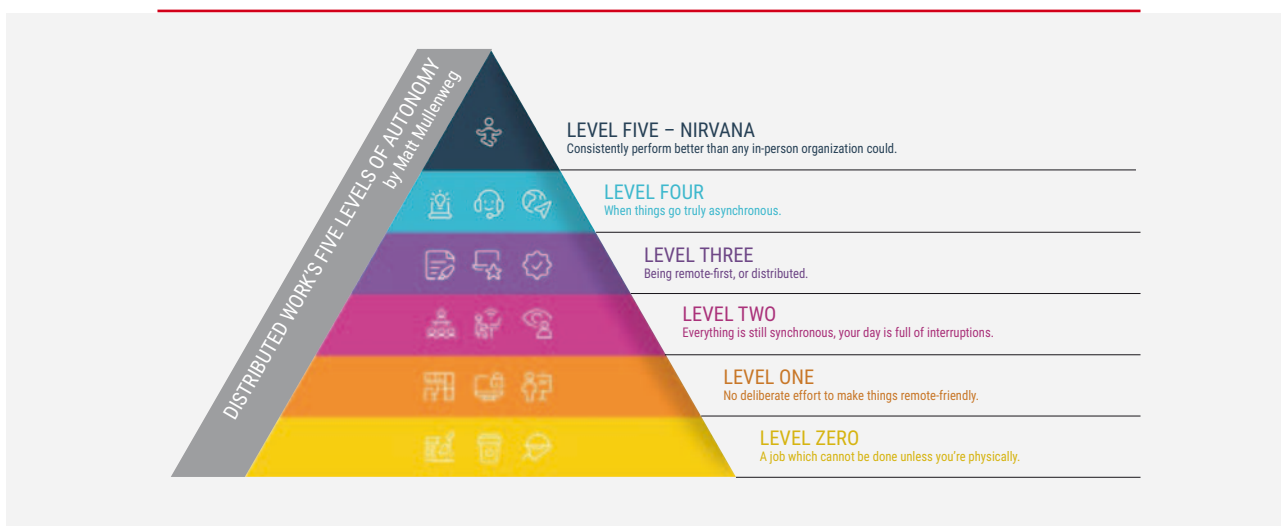


Illustration 1. Mullenweg's pyramid.

At the same time, recovering the initial idea that we are social beings, we must be aware that, on many occasions, part of the work and business functions cannot and will not be replaced by videochat/webinar platforms or similar. On many occasions part of our work will require us to go and see it, try it, feel it, verify it or talk about it in person. At other times we will find that the simplest and most effective way to get the job done is online. So it is more than likely that this new reality will bring with it new ways of organising ourselves at the business level and, if we want to be attractive to talent, we will have no choice but to adapt and evolve.

And it is precisely in this necessary capacity for adaptation and evolution of the company that organisational culture plays a special role.

Interestingly, according to an article published in the MIT Sloan Management Review where the authors study the causes of the "Great Resignation", a toxic culture (a culture that fails to foster diversity, equity and inclusion, where the employee does not feel respected and/or where unethical behaviours exist) is the main cause

that has led to thousands of employees resigning from their positions in the United States. Moreover, this factor is 10 times more important than salary compensation in predicting turnover in organisations.

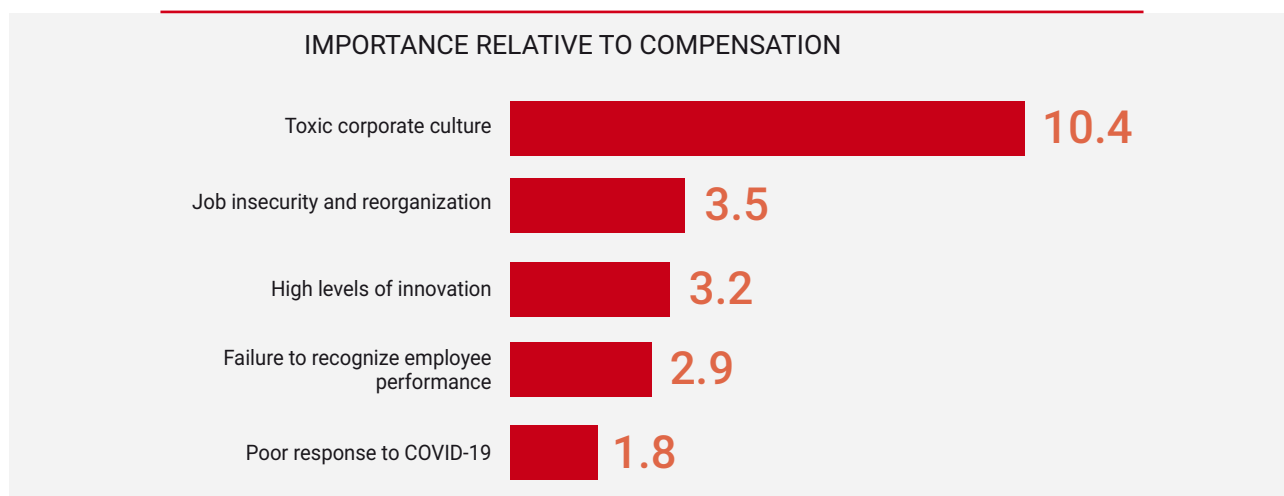


Illustration 2. Top Predictors of Attrition During the Great Resignation, MIT Sloan Management Review.

At present, it does not seem feasible for workers to resign collectively. However, our companies should not forget that, although this phenomenon has taken place on the other side of the Atlantic, it does not seem to be extrapolated to our reality, since, according to different surveys, around one in four workers would be considering leaving their job, to which should be added the current turnover rate they already have. In this context it does not seem unreasonable to start taking measures to strengthen and take steps towards a robust organisational culture that cares about the well-being of the people who are part of that project.

In short, we face an uncertain yet exciting scenario, where we will have to move boldly and nimbly to meet the challenges that the future holds for us in terms of attracting and developing talent in our territory.

The Basque Talent Evolution & Trends 2022 report highlights some of the most significant challenges and opportunities in this area. We invite you to reflect.

ATTRACTING AND RETAINING TALENT

CHALLENGES IN THE SEARCH AND SELECTION OF PROFESSIONALS IN A DIGITAL ENVIRONMENT

Digital environments have transformed interactions and the way people relate to each other. Relationships have been impacted not only by the speed and form in which information is transmitted, or the volume of content, but also by the fact that this information is available in a variety of formats and can be accessed from anywhere in the world.

Search and selection processes are no stranger to this reality - according to Social Meep, 89% of recruiters have hired through LinkedIn. The new way of doing business has a direct impact on candidates, with Forbes indicating that currently 73% of 18-34 year olds found their last job through social networks.

Digital platforms such as LinkedIn, Infojobs, Infoempleo, Indeed or Glassdoor, as well as companies' own websites (or their own job portals), allow users to benefit from immediate interaction and avoid unnecessary physical travel. Getting to know the candidate in their "natural habitat" and, obviously, reducing costs in the selection process are some of the advantages of searching for and selecting talent in a digital environment.

On the other side of the coin, however, there are obstacles inherent to digital environments such as computer security vulnerabilities or the risk of global crashes or massive Internet failures, among others. In addition to the technological challenges, recruiters face the added difficulty of incomplete or outdated candidate profile information. Also, we should not forget that not all profiles are on digital platforms. With regard to this last point, it is important to underline that the consumption of digital platforms is quite disparate between generations, with Generation Z being the most present on social networks (3 hours and 22 minutes/day), followed by Generation Y or millennials (3 hours and 17 minutes) and with Generation X in third position (2 hours and 48 minutes), according to the 2019 Global Web Index. On the other hand, the difference in usage time between generations is also visible on employment platforms, with GEN Y using LinkedIn more (almost 10%) than GEN Z (28% and 19%, respectively).

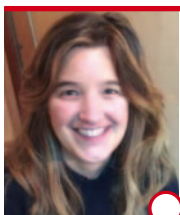
In addition to the technological challenges, recruiters face the difficulty that candidate profile information is not complete and, on the other hand, that not all profiles

The **Be Basque Talent Meetings** are digital meetings where territorial companies present their projects to highly qualified professionals who want to know more about the professional opportunities they offer.

If you are interested in starting to position yourself as an employer among professionals with international experience please contact us via e-mail: bbtc@bizkaientalent.eus

can be found on the platforms. This is one of the consequences of the disparity in the use of social networks between the different generations and occupational groups.

Digital platforms not only provide a different environment but also require organisations to adopt new ways of doing things. High competitiveness demands working on brand positioning by identifying the channels and content that the target audience wants to receive, in this case, what potential candidates need. Regardless of the means used to reach out to the applicant, building long-term relationships based on trust will be essential for attracting highly qualified profiles.



MILENA USABIAGA ZABALA, Team Leader at Capgemini Engineering

The main difficulty for candidates is in getting a feel for the organisational culture of the company they are interviewing with if the process is conducted solely via digital platforms. Despite this, there are benefits to be highlighted, such as being able to see each other, when compared to telephone calls, with non-verbal language being a channel through which valuable information is obtained. I myself was able to participate in a selection process while I was in San Francisco (USA) and thus return to the Basque Country without the need for a previous displacement.

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IÑAKI GOYENECHÉ ARRIBALZAGA, People Area Manager & Head Hunter at leTeam Consultores

Today and in the future, the first interaction will be digital, human-machine. It is the system that searches and identifies and therefore the candidate must reflect his/her professional profile online, taking into account the appropriate keywords, as well as the pre-established fields (dates, area, sector, position, etc.). Once our "hardest" profile has been detected, the next and last stage will be based on getting to know the people, their aspirations, values, competences and "feeling", a 100% human aspect that is of great value in the whole process.

YOU ARE NOT THE ONLY ONE LOOKING FOR IT PROFILES

The digitisation of the economy and of business were the most frequently repeated search terms over the past two years. In 2021, global recruitment firm Michael Page identified three clear investment trends in a survey of managers around the world: further software development, increased digitisation of the customer relationship and the incorporation or upgrading of CRMs or ERPs. In addition, data management, process automation and cyber security became more important to these executives.

This increased investment in digitisation has, to a greater or lesser extent, had an impact on the people side of all organisations. On the one hand, many of them have started to digitise the tasks linked to the People Department, which has required the development of a whole part of the organisation that was previously not very digitised and, consequently, the acquisition of new competencies. On the other hand, it has created a greater need for organisations to recruit IT-related profiles and has made it more difficult for the People Department to attract these profiles to the company. In fact, according to the *Flexibility at Work* report by Randstad, more than 25% of large companies in the OECD are having difficulties in finding certain *tech* profiles.

In relation to the digitisation of the People Department, a wide variety of companies (also startups) have emerged during this time that offer comprehensive or partial digital solutions to meet your needs. From companies that offer salary reports, applicant tracking systems (ATS) or even companies that digitise a company's performance appraisal. Artificial Intelligence, virtual reality or Blockchain applied to talent management are also frequently mentioned as the next "big thing" in this digitalisation of the people department.

However, where this increased digitisation is causing the most problems for the company is in finding and attracting people with IT skills and qualifications. While in the past this type of profile was mainly recruited by technology organisations, greater investment in digitalisation has generated new competitors in the recruitment of this type of professional: organisations from other sectors or organisations located in other parts of the world. According to the [Basque Talent Observatory](#), software devel-

The **Customer Relationship Service** of Bizkaia Talent works constantly to maintain a fluid relationship with the organisations and professionals in its network. Knowing the needs of each other is key in talent management.

The response to these needs is channelled through this service with tools such as:

- [Headhunting Support Centre](#) (organisations)
- [Career Development Centre](#) (candidates)
- [Job Offers](#)
- [Basque Talent Observatory](#)

More information:
careers@bizkaiaalent.eus

opers were the second most in-demand profiles in 2021 and, for example, at Bizkaia Talent, offers related to the IT field increased by 25% in 2021 compared to the previous year.

This new situation has given the candidate a decision-making power that he or she did not have before, and companies are beginning to notice this. For example, there are more and more cases in which a person enters a recruitment process simply for the purpose of negotiating with his or her current employer about his or her conditions. Professionals working remotely for companies located in other countries are also becoming increasingly common. The other side of the coin shows us processes that remain deserted and, therefore, projects that come to a standstill due to a lack of people. Ultimately, an increase in demand for IT professionals in combination with a shortage of valid candidates is resulting in improved conditions and salaries for IT professionals.

From the company's perspective, it is also becoming evident that traditional recruitment (posting an offer and waiting) and even recruitment through social networks are no longer or are beginning to cease to be useful ways of reaching IT profiles. Given this lack of candidates in their recruitment processes, those organisations that are experiencing this problem earlier than the rest have already started to explore new talent pools (niche communities and platforms) as new recruitment avenues (e.g., *inbound recruiting*) or even increasing their teams and collaborating with the marketing division to generate content (offers, web pages, campaigns, etc.) that until recently would have been unthinkable in the human resources field.

ADMINISTRATIVE-BUREAUCRATIC MANAGEMENT IN THE INCORPORATION OF INTERNATIONAL TALENT

When we talk about attracting and recruiting international talent, we tend to consider mainly issues related to communication, presence in networks, how to make ourselves known in certain areas, etc. However, there is one issue that often goes unnoticed in this planning phase and which, unless it is done correctly, can cause us major headaches - whether we are a company that wants to incorporate someone who lives abroad into its ranks, or we are professionals looking for a new professional adventure outside the country in which we currently work: administrative-bureaucratic procedures.

The legal and/or administrative formalities to be considered in order to incorporate an international professional, whether from a third country, European or national, need not necessarily be complicated. Even so, each case must be carefully analysed individually. The casuistry depends not only on the characteristics of the professional to be incorporated, but also on the typology of the organisation.

We must also not forget that the family is another variable to be taken into account in this process. This is why it is important to manage it in good time, in order to avoid unexpected problems once we have found our ideal candidate.

By way of example, three practical cases are presented in a summarised and simplified form, showing the importance of managing the legal and administrative-bureaucratic procedures for the incorporation of international professionals through the Law 14/2013 to Support Entrepreneurs and their Internationalisation.

In the framework of the **Relocation service**, Bizkaia Talent provides information and advice to organisations and highly qualified professionals on the management of administrative and bureaucratic procedures. In addition, the partners of such professionals find support through the **Be Basque Dual Career Centre**, through which Bizkaia Talent seeks to help and facilitate their arrival in the territory.

In 2021, where around 900 enquiries were answered, 40% of the requests for assistance from businesses were in relation to work authorisations and visas.

More information:

[Relocation Service](#)

[Be Basque Dual Career Centre](#)

Company in a strategic sector or project of interest that wants to hire an architect (highly qualified professional) from Argentina (third country).



Main factors to be considered

The organisation must meet one of these requirements:

- Workforce, in Spain, of more than 250 employees in the 3 months preceding the application.
- Turnover in Spain > €50 billion or equity or net worth in Spain > €43 billion.
- Average annual gross investment from abroad of not less than €1 billion in the three years immediately preceding the application.
- Investment stock in excess of €3 billion.
- Be an SME in a strategic sector and demonstrate that the business project to be carried out is considered to be of general interest.

In the event that the company only complies with this last point, the SME will have to request the report for highly qualified professionals from the Directorate General for International Trade and Investment of the Ministry of Trade, Industry and Tourism in order to be able to manage the residence and work permit under the Law 14/2013 to Support Entrepreneurs and their Internationalisation.

- The company must offer the professional a salary in line with GROUPS 1 and 2 CNO-11 (at the time of writing, minimum salaries are between €40,077 for technicians and €54,142, as appropriate).
- The professional to be hired must meet the following requirements in order to be eligible under Law 14/2013:
 - Have a higher education qualification.
 - If the professional is going to practice a regulated profession, he/she will have to have his/her university degree recognised (in this example, if the architect to be recruited is going to sign projects, he/she should have his/her degree officially recognised). It is worth mentioning that the recognition process takes, in most cases, more than a year.

The hired professional is from France (EU) but his partner is from the UK (third country) and they are not married or in a civil partnership. The two have a child together, and the partner of the hired professional also has another child from a previous relationship who will come to live with them. The two children are minors and also from a third country (UK).



Main factors to be considered

Difficulties in bringing the partner, because they are not married or in a civil partnership:

- Difficulties in bringing the partner's child from a previous relationship, as the child is a third country national and not a descendant of the worker.
- Unless the necessary paperwork is done, the couple would not be able to work and/or reside in the Basque Country. The child of the previous relationship could not reside in the Basque Country either.
- Unless the necessary documentation is provided, neither the partner nor the child from the previous relationship would be entitled to public health care as there is no legal link with the professional (who is affiliated to the Social Security system).

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Research professional from India (third country) coming for a stay (not contract) for a period longer than 3 months.



Main factors to be considered

- A visa for stay is required.
- The research professional is not entitled to public health care because he/she is not affiliated to the Social Security. Therefore, private health insurance would be required.

In general, apart from the procedures for residence and work permits, we could summarise the main obstacles and common problems in recruiting international talent in the following three points:

Social Security: only the spouse or common-law partner and the descendants of the contracted professional will have access to public health care.

Housing (census): It is important that they can be registered in the place where they are staying, as this is essential in order to obtain the health card. It is worth mentioning the difficulties in finding accommodation from outside the Basque Country due to the characteristics and dynamics of the real estate market.

Enrolment in school outside the regular term: In order to be able to enrol children after the enrolment deadline, they will have to be registered on the census and it will be up to the Territorial Schooling Commission of the Basque Government's Department of Education to accept the request and to analyse, depending on where the child is registered on the census, whether there are free places in the required school.

In order to facilitate this process, Bizkaia Talent has developed a **checklist**, a useful and practical tool, so that the member organisations of the Be Basque Talent Network can have general information and a roadmap to follow, always with the personal support of an expert team. If you are interested, you can apply at mobility@bizkaiaalent.eus

DEVELOPING TALENT

TECHNOLOGICAL COMPETENCE, A TRANSVERSAL COMPETENCE?

In March 2021, the European Commission presented a vision and pathways for Europe's digital transformation by 2030, called "2030 Digital Compass: The European way for the Digital Decade". One of the objectives of the plan is that 80% of the population should have basic digital skills by 2025. The acquisition of knowledge and skills in this area was already a strategic area before 2020, but the pandemic has only accelerated the urgency of adapting to this new paradigm.

In this respect, the European Union has launched the [Digital Education Action Plan \(2021-2027\)](#), a renewed policy initiative that aims to support a sustainable and effective adaptation of EU Member States' education and training systems to the digital age. To achieve its objectives, the Action Plan sets out two priority areas:

- 1) To foster the development of a high-performing digital education ecosystem.
- 2) To enhance digital competences and skills for digital transformation.

In this article we focus on this second area, which requires working along several lines:

- basic digital skills and competences from an early age;
- digital literacy, including the fight against disinformation;
- computer education;
- good knowledge and understanding of data-intensive technologies such as artificial intelligence;
- advanced digital skills that generate more digital specialists;
- ensure that girls and young women are equally represented in digital studies and careers.

"Digital" refers to that which relates to the fingers. However, with the advent of information technology, this word has become inextricably linked to technology. However, when we talk about technological competences, we are not just talking about

digital software, especially in work-related areas. Along these lines, according to the Basque Talent Observatory, 66% of the offers analysed indicate that basic technological knowledge is essential for the position.

On this path, the involvement of all agents in society, from institutions to companies, including educational centres, is key. Therefore, we wanted to gather the impressions of Noemi Peña, Director of Entrepreneurship and Transfer of the Bizkaia Campus of the UPV/EHU; Alex Rayón, Vice-Rector for International Relations and Digital Transformation of the University of Deusto and Director of Deusto Data; and Luis Berasategi, Coordinator of the Urban Laboratories of Bilbao AS Fabrik - Mondragon Unibertsitatea, all of them representatives of Basque universities, to know their point of view, and see how they perceive education in these terms:



42 Urduliz: Fundación Telefónica and the Provincial Council of Bizkaia promote training in programming and transversal skills that are most in demand in the labour market through this educational model that has a 100% employability rate.

42 Urduliz is a programming campus with no classes, no books, no age limit, open 24/7 and 100% free. A pioneering pedagogical model based on peer-to-peer learning and gamification, where each student freely sets their own learning pace and where collaborative work, effort and perseverance take precedence.

To join 42 Urduliz you don't need any previous knowledge or qualifications of any kind, you just need to be over 18 years old, be willing to learn, have a positive attitude and perseverance and pass two phases: an online application test and a 26-day in-person selection period.

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NOEMÍ PEÑA MIGUEL, Director of Entrepreneurship and Transfer of the UPV/EHU Bizkaia Campus. Head of the entrepreneurship programme of the Bizkaia Campus – ZITEK.

What is technological competence for you?

It is the competence developed through information and communication technologies and digital media, which allows us to perform tasks, solve problems, communicate, collaborate, create and manage content, information and knowledge in a different way than before.

Is it important for everyone to know about it? Why?

As I have said before, everything digital is invading all aspects of our lives - personal and professional life - from the way we carry out administrative procedures, our relationship with public administrations and companies, our way of producing and consuming, the way we do business, even how we relate to others.

“I personally hope to eliminate this gender gap in the technological field, but it has to be seen as a long-distance race.”

What role does technology play depending on the type of organisation? How is it linked to talent?

Technology is key to improving and working with talent, in fact, talent and technology go hand in hand and organisations know this when they are looking for talent. What we try to do within the university is to combine knowledge with technology so that the talent that comes out of the classroom can be successfully inserted into the job market and integrated into organisations in a natural way.

What is the role/importance of gender diversity in this area? Do you believe there is equality?

I believe that women’s access to technology has evolved over the years in terms of how women have been empowered to lead technology projects. There is still some way to go for female talent to grow and shine in Steam profiles. I personally hope to eliminate this gender gap in the technological field, but it has to be seen as a long-distance race, we have to work to achieve this goal in the medium/long term.

What is UPV/EHU/Zitek doing in this field?

In the area of entrepreneurship, we strive to give visibility to women who lead technological projects that are developed at the university and to this end we show these projects in the different classrooms of our faculties so that they can serve as an example for students to follow. We also try to facilitate the inclusion of female Zitek entrepreneurs who wish to join other networks of women entrepreneurs.



ALEX RAYÓN JEREZ, Vice-Rector for International Relations and Digital Transformation of the University of Deusto and Director of Deusto Data.

Do you think that technological competence is transversal?

In my opinion, the first thing that should be done to define digital competence is to break it down, and to do so, the first element is to be clear that being competent in the digital era is not the same as being digitally competent.

Firstly, programming (the ability of a human being to build new machines) should be a fundamental part of today's education and should be introduced from the basic curricula. Otherwise, what we are doing is aggravating a tremendous gap between those who know how to code and those who do not.

Secondly, soft skills seem to me to be crucial. Mainly:

- Complex) problem solving.
- Team work.
- Systemic thinking: one must know how to think globally and about each of the pieces.

Thirdly, the use of tools, which is how digital competence has often been mistranslated over the last 20 years. To give an example, today I can learn how to use a CRM, but if tomorrow a different one comes out, I will not understand it and the fact that what I have learned is no longer useful to me will generate frustration.

It is therefore important, first of all, to have learned well how to dialogue with a machine (programming and computational thinking) and to acquire these soft skills which are needed to better understand what a machine is capable of building.

What is the role of universities when participating in this “digital education”?

I insist that this has to be in place from an early age, as there is ample evidence that shows that this is when the child's development is much more conditioned than at university.

“I would completely reorganise the order in which digital skills training is done, and I would propose a National Plan for being competent in the digital age.”

In any case, at the University of Deusto (inspired by formats such as that of the University of Comillas) we are trying to work on it from a cross-cutting perspective with some subjects. For example, a diploma in analytical foundations for students from different fields who do not know how to program (law, international relations, business administration, finance, etc.) to be taught to programme analytically, with data.

And how, in your opinion, should such training be approached beyond the universities?

I would completely reorganise the order in which digital skills training is done, and I would propose a National Plan for being competent in the digital age.

By way of example, Finland has the National Plan for artificial intelligence, for me the best model in the world: very powerful programmes that can be taken by the whole population for free, from learning how to program to learning how to make predictive models, with all the gradient of levels that exist.

Singapore, on the other hand, has a similar approach, but instead of being for the whole population, it is aimed at unemployed people, who receive support from the government for an intensive 12-month programme, which is then accompanied by a job placement (something similar to the Dual system we know in the Basque Country), a process aimed at re-skilling people.



LUIS BERASATEGI RETEGI, Coordinator of the Bilbao Urban Laboratories AS Fabrik, Mondragon Unibertsitatea.

Is technology a cross-cutting skill?

Clearly yes: in my opinion, it is not something that only those who are directly involved in it by training should know about, just as someone working with technology should know about other elements (business, ethics, sustainability, etc.).

It is not only about knowing about certain technologies, but also about the methodologies that are applied when using these technologies. One of the best examples of this is experimentation, prototyping.

It is said that the new generations are digital natives, but often their knowledge is limited to user level, and not so much to developer level.

I think there are two important points to make. Regarding digital natives, the lack of technological culture that we generally have makes us think that because a young person is on their mobile phone all day long, they know certain technologies better, but if this use is limited to social networks, it is difficult for them to be competent in new technologies.

On the other hand, we must dispel the idea that from a certain age onwards, learning is not possible. The learning period never ends, the whole life cycle of someone is a learning period. Related to this, the pandemic has shown us that in a very short time we can adapt to the use of new tools, something that seemed almost impossible before.

From your point of view, how does this adaptation work in companies?

In organisations, the common trap is that, after a certain age, people close their learning cycle. Those who understand that the learning cycle never ends will not have any problem with new technologies. The key is empowerment, the awareness that everyone is the master of his or her own learning process.

Is it important for everyone to have technological skills? How do we ensure that everyone has this knowledge?

The first step is to raise awareness, and this is where families and society

“Those who understand that the learning cycle never ends will not have any problem with new technologies.”

come first, before students. Mastery of technology is part of the culture, basic to performance.

How does AS Fabrik work to achieve this?

At AS Fabrik we work to raise awareness in both areas:

As far as the student body is concerned, AS Fabrik is made up of three faculties: humanities, business and engineering. It is a cocktail shaker. It is of interest that there are degrees in which technology and sustainability are combined. The trend towards hybridisation is key. The mix of profiles and sectors, the entrepreneurship, the challenge orientation connecting with reality, which forces us to be familiar with the data, the reality and the business...

When talking about raising awareness in society, we have to understand that we are part of a system, and this is a long-term job. The concept of a technology project based on a coworking space is insufficient. For a technological project to happen, there must first be trained people, and before that, we will have had to attract communities, people with common interests in which technology is simply another element. You can build from there. The key to the ecosystem is movement.

SILVER ECONOMY, THE ECONOMY OF THE NEAR FUTURE

In the last decade, Basque and Biscayan society has undergone significant changes and we will continue to experience a transformation in the coming years. In 2030, 5 out of every 10 Biscayans will be over 50 years of age, and as this is a group with a growing purchasing power and with specific needs for leisure, health, wellbeing and long-term care, it is a strategic population to focus on.

The increase in life expectancy and the chronicisation of diseases pose a new reality and new needs to which we must respond. The increased longevity of modern societies brings with it socio-economic opportunities for the creation of new jobs, for the development of new areas of knowledge and research and for the promotion of innovative economic activities with high added value and the attraction of talent and investment. With an improving quality of life and, in many cases, the will to remain in a profitable activity, people reaching middle age are looking for products and services for which the level of supply is often inadequate.

Healthy life spans are extended, productive years are multiplied and seniors have much to contribute to society. This includes the economic sphere. Thus, the silver economy is the set of economic activities that respond to the needs of older people, including goods and services purchased by older people directly, as well as the public sector and related indirect economic activity.

There is a new stage of life after the age of 50, which has been christened the *silver* generation. The grey hair revolution will bring radical change because it will allow millions of people of that age to continue working, saving, creating and consuming, making it possible for new industries to be born to serve them and new entrepreneurs to emerge. It is an opportunity to generate economic impact, social impact and impact on the quality of life of older people.

As a society, we must turn the challenge of an ageing population into an opportunity to develop a new sector of activity in the silver economy, which, through the promotion of talent and innovation, contributes to the generation of quality and sustain-

Bizkaia Silver Economy 2021-2022 Programme

In 2021, the Provincial Council of Bizkaia launched this programme, which is managed by Bizkaia Talent and is aimed at highly qualified people, for specialised training in the silver economy sector, in order to improve their skills and adaptation to the new global scenario.

The aim of the programme is to promote training, knowledge and the development of skills at the highest level in the silver economy sector, so that Bizkaia has trained professionals who can respond to the needs posed by the challenge of an ageing population and the growing demand for products and services associated with that population. The programme will have a new call also in 2022.

More information:

bizkaiaeconomiaplateada@bizkaialent.eus

able employment in response to the needs of older people. To invest in the silver economy is to translate population ageing into a positive scenario for social and economic development, taking advantage of the opportunities it presents.

In order to stimulate the opportunities offered by the emerging silver economy sector to generate economic impact, social impact and impact on the quality of life of the elderly, it is necessary to promote training, knowledge and the development of skills at the highest level in the silver economy sector, so that Bizkaia has trained talent that can respond to the needs posed by the challenge of an ageing population and the growing demand for related products and services.

FÁTIMA JIMÉNEZ ACEBRÓN, Professional with 22 years of experience as an employment counsellor, in-person and online trainer in dependency care, personal and digital skills for employment and a social entrepreneur. Graduate student specialising in silver economics.

Do you think it is appropriate for Bizkaia to consider the silver economy sector as strategic for the territory?

It is very timely and strategic, as Bizkaia is a territory, not only with the traditionally oldest population (currently 23% of the population of Bizkaia is over 65 years old [INE 2020]) in the BAC, but also with a scenario that continues to be on the rise (with a forecast increase of 10% in the next ten years) the Basque population is longer-lived than the average population of the EU.

In addition, the silver economy focuses on people aged 50-55 and over, the target group with new needs in the design of solutions, services, products and social redesign in all areas: employment and productivity, leisure, life plans, social and health wellbeing, housing, economy and finance, etc. It also multiplies the demand for such services and products, which can generate opportunities for economic growth and the expansion of innovation.

“I believe that the silver economy is a sector not only with a future, but we could already say with a present.”

Is it a sector with a future?

I believe that this is a sector not only with a future, but we could already say with a present. We have been moving for some time now in the scenario described above and this, together with other scenarios such as the digital transition, green economy and other values, make the silver economy a constantly growing space.

Will new business be developed around this strategic area?

Current businesses will necessarily have to undergo a reconversion, adapting to the present and future in order to be able to continue to satisfy their demand. In addition, some others will emerge as a solution to what does not yet exist, either as a unique solution or as a complement to what already exists.

It is not so much a question of some having to disappear, but of improving, innovating and making any business that aspires to be sustainable and modern more accessible and people-centred.

Why did you decide to train and specialise in the silver economy sector?

Because of my background in training and employment, I have been interested in productive work and what happens to people in retirement (not what used to happen: a rupture between the productive and the non-productive) in an employment paradigm which is also currently undergoing a transformation, and which requires new ways of managing, solving and even recycling a stage of life which, thanks to longevity, is a stage full of years and possibilities.

In the same way, due to my professional experience, I am interested in specialising in knowledge about the integration of new technologies and assistive technologies for people who, due to functional diversity or dependence, require optimisation for better access to employment, leisure, the economy, life projects, socio-health well-being, etc.

I consider that training in the silver economy sector provides me with an integrated perspective of multiple factors in order to design and generate growth opportunities to meet the challenging proposals demanded by demographic and social evolution in tune with the new paradigms in society and employment.



ÁLVARO MOLINERO MOLANO, Health Business Consultant, expert in the ageing market and social economy. Graduate student specialising in silver economics.

Do you think it is appropriate for Bizkaia to consider the silver economy sector as strategic for the territory? Is it a sector with a future? Will new business be developed around this strategic area?

It's not that I think it's appropriate, it's that I consider it essential. If this were not the case, we would not be investing in a solid and truly effective strategy that would allow us to address the challenge that the new models of old age pose for us.

Society and its demographics are constantly evolving and this requires a new approach to the strategy that is really necessary from the Bizkaia ecosystem.

So much so that there are already several projects in the territory that demonstrate a great advance in relation to this new way of understanding long-term care or the permanence in the home of the elderly, who will account for 33.4% of the Basque population -over 65 years of age- in 2061 (Eustat, 2021).

Some of these advances can be found, for example, in the consolidation of the etxeTIC model, a firm commitment of both the Department of Social Action of the Provincial Council of Bizkaia and the provincial entity Azpiegiturak where companies such as NTT DATA, Igurco (of the IMQ group) or Ideable are contributing their expertise for an optimum execution of the defined objectives.

Why did you decide to train and specialise in the silver economy sector?

It is clear that we are facing a shift in the paradigm of care for the elderly (of whom there are and will be more and more) and this opens the door to a multitude of business opportunities that we could not even imagine at this moment in time.

This shift in paradigm affects various disciplines or sectors, not only the care field on which we all focus, for the most part. Without wishing to ignore the importance of the care of the future, the market is facing a

“We are facing a shift in the paradigm of care for the elderly and this opens the door to a multitude of business opportunities.”

historic milestone as it tackles the enormous challenge of responding to new models of old age.

In the face of these new models of old age, the *Silver Economy* and knowledge thereof, makes its participants key agents of change. A change that involves having specific *expertise* which enables the adaptation of solutions (whether technological or not), and which thus provides a global strategy that allows public administrations and/or the private sector to provide the appropriate and necessary responses.

In short, I consider it essential to train agents with the necessary knowledge to tackle this type of change in the model we have known up to now, and it is for this very reason that I have embarked on specialising in this very interesting sector that is the *Silver Economy*.

LABOUR MARKET TRENDS AND EVOLUTION

This section contains a more quantitative analysis related to the Basque highly qualified labour market. This is an own elaboration based on data compiled on the one hand by the Basque Talent Observatory and on the other hand from the Population with relation to activity (PRA) of the Basque Statistics Institute, Eustat. After showing the evolution of vacancies, occupations and skills, the distribution and evolution of the population in relation to activity and self-employment, the role of public administration as a job seeker and the trend in education levels in the different activity groups, a final section is also devoted to the evolution of highly skilled digital profiles.

Basque Talent Observatory

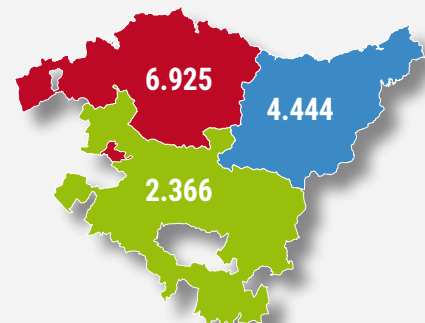
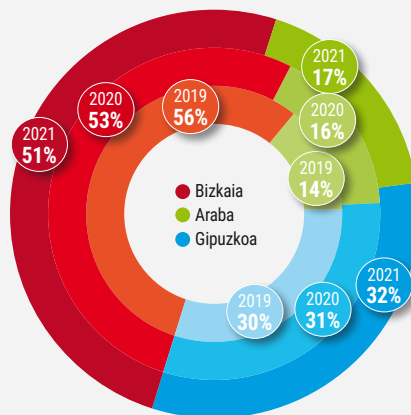
The Basque Talent Observatory (BTO) is the world's first publicly accessible tool for monitoring the Basque Country's highly qualified labour market and obtaining information on specific professionals through the analysis of Big Data from multiple on-line sources. The BTO analyses occupational profiles on the basis of the European Commission's Occupations ESCO classification.

TRENDS IN VACANCIES IN THE BASQUE AUTONOMOUS COMMUNITY

From 1 January 2021 to 31 December 2021, 13,612 highly qualified job offers requiring a university degree or an advanced vocational training were analysed.

Analysing the location of the vacancies, Bizkaia is the historical territory where most vacancies are published (51%) followed by Gipuzkoa (32%) and in third place Araba (17% of the vacancies).

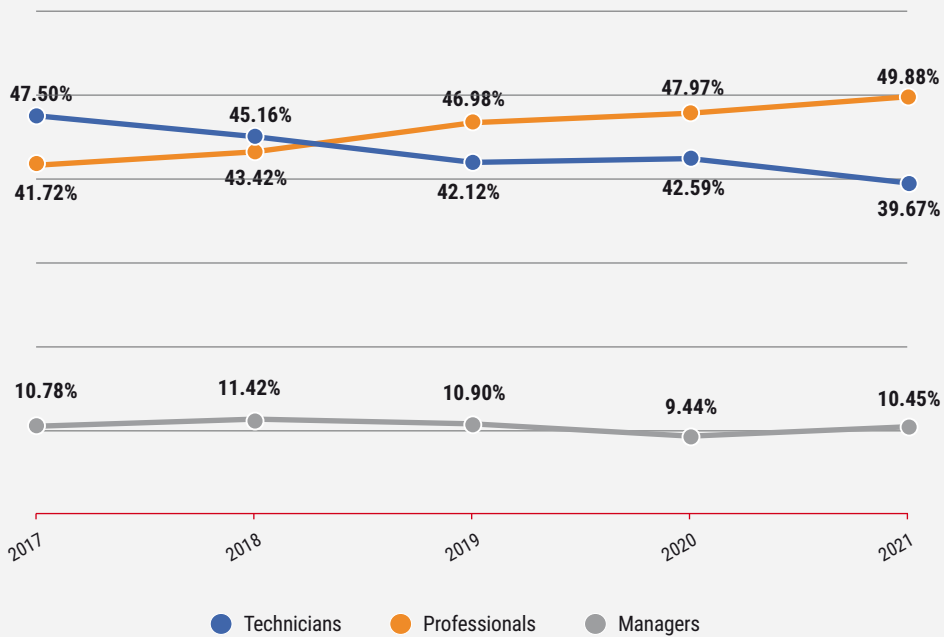
	2021
Offers Analysed	13,612
<i>Geographic Areas</i>	
Bizkaia	6,925
Araba	2,366
Gipuzkoa	4,444
With difficulty in allocating territory	-123



ANNUAL EVOLUTION OF TECHNICAL, PROFESSIONAL AND MANAGERIAL OCCUPATIONS

	2017	2018	2019	2020	2021
Technicians	47.50%	45.16%	42.12%	42.59%	39.67%
Professionals	41.72%	43.42%	46.98%	47.97%	49.88%
Managers	10.78%	11.42%	10.90%	9.44%	10.45%

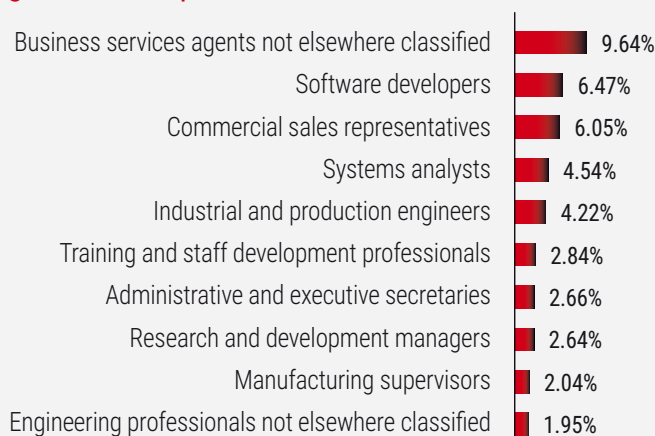
Year-on-year evolution



EVOLUTION OF THE MOST IN-DEMAND HIGH-SKILLED OCCUPATIONS IN 2021

We can see that the 10 most sought-after occupations in the highly qualified labour market are:

Most sought-after occupations in 2021

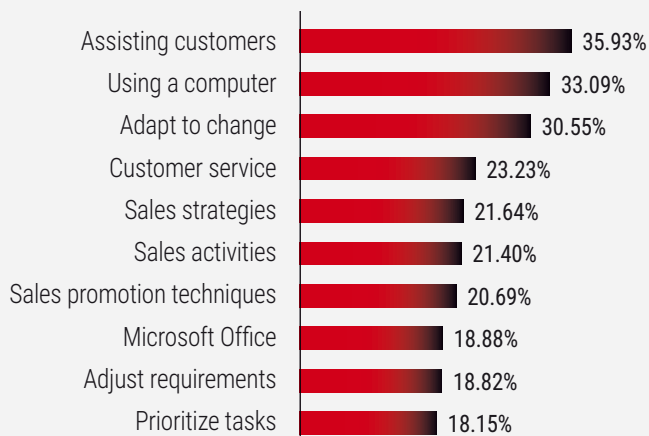


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EVOLUTION OF THE MOST IN-DEMAND SKILLS IN 2021

The most sought-after skills in 2021 are:

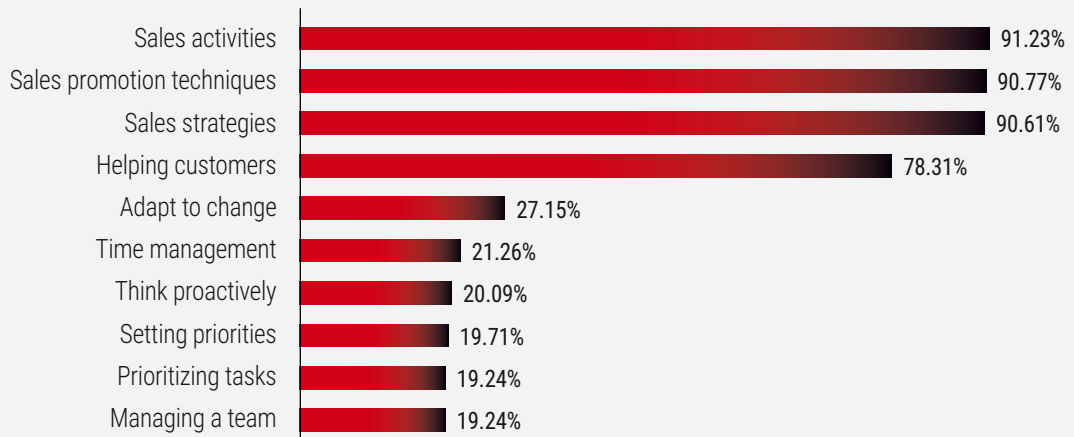
Most demanded skills in 2021



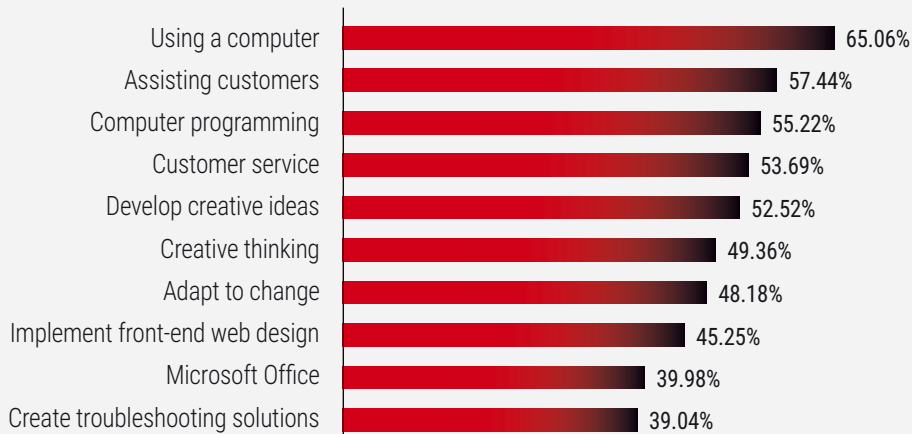
EVOLUTION OF SKILLS ACCORDING TO THE MOST IN-DEMAND OCCUPATIONS IN 2021

In this case, the percentage represents the number of times that skill appears in the occupations:

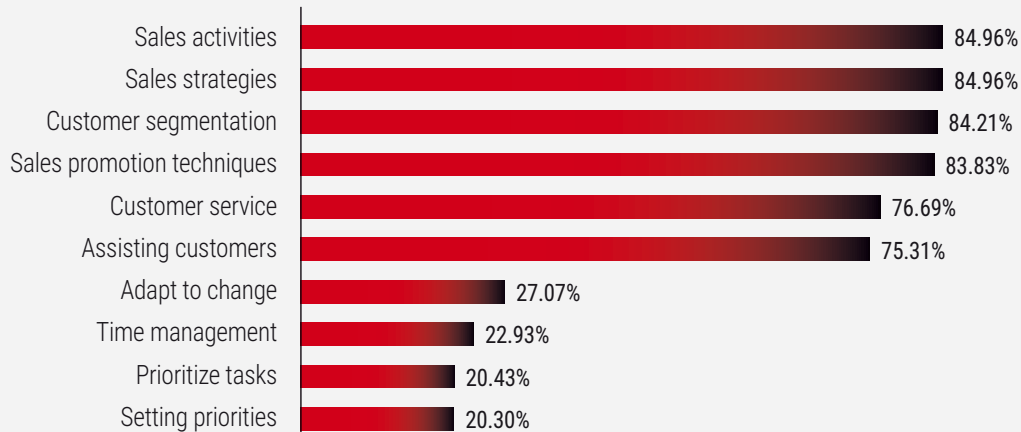
Business services agents not elsewhere classified



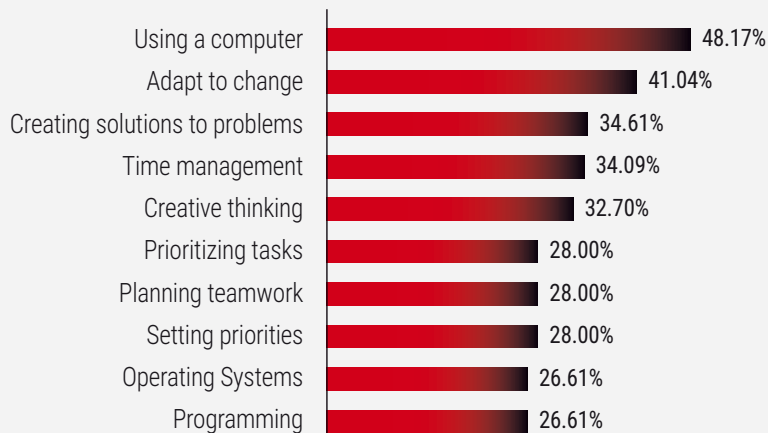
Software developers



Commercial sales representatives

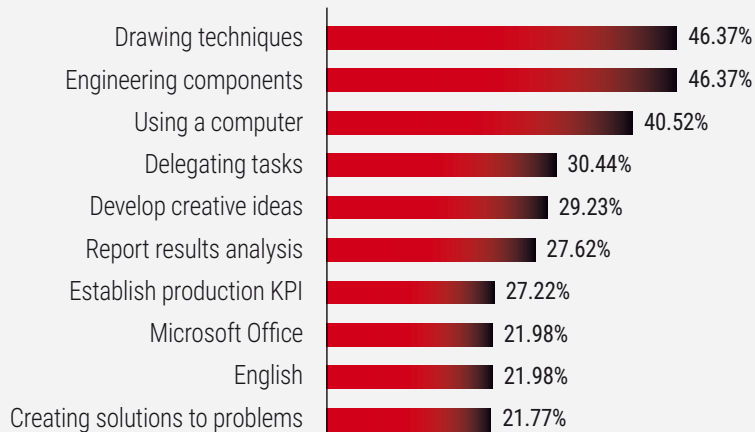


Systems analysts

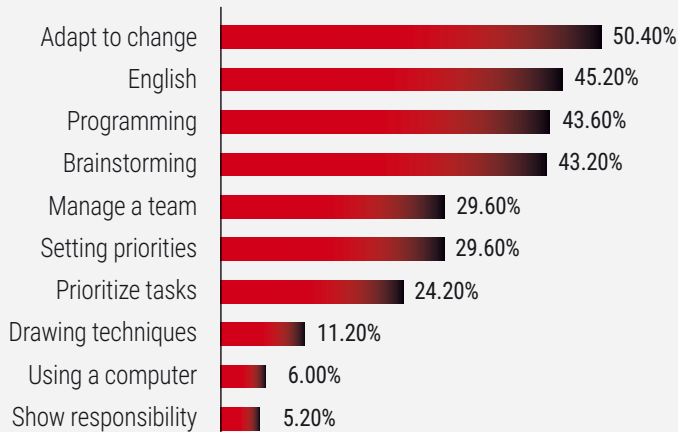


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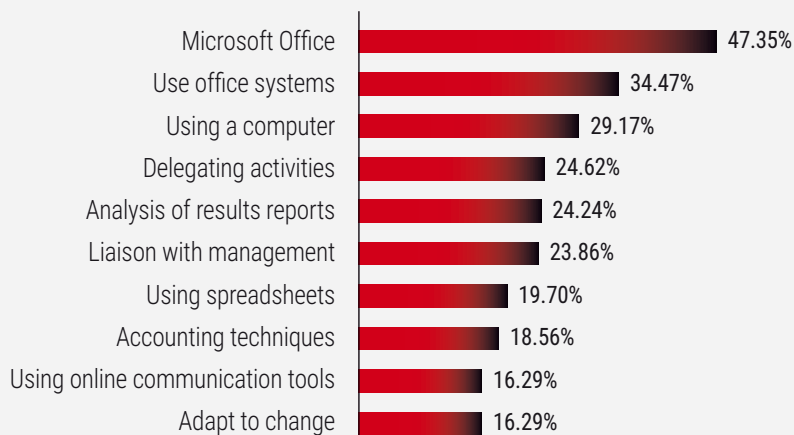
Industrial and production engineers



Training and staff development professionals

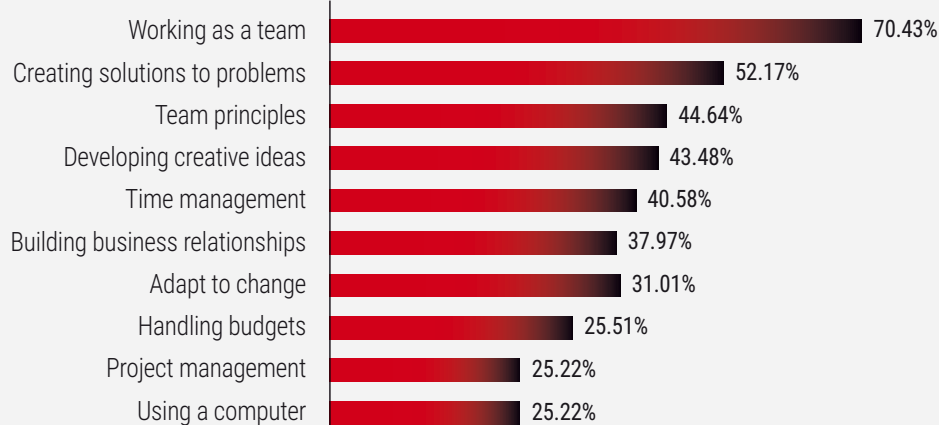


Administrative and executive secretaries

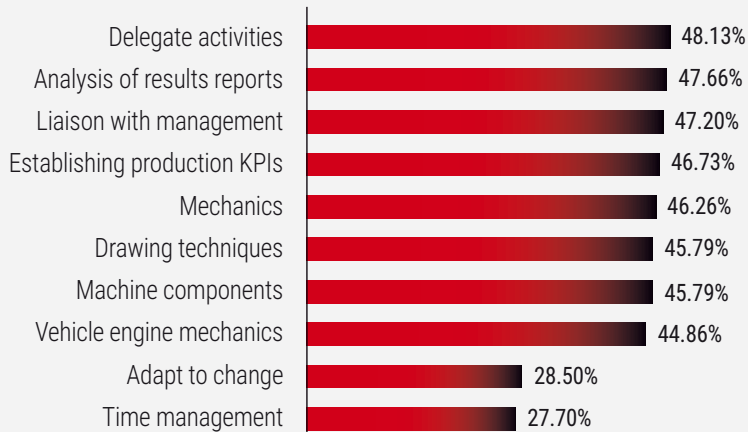


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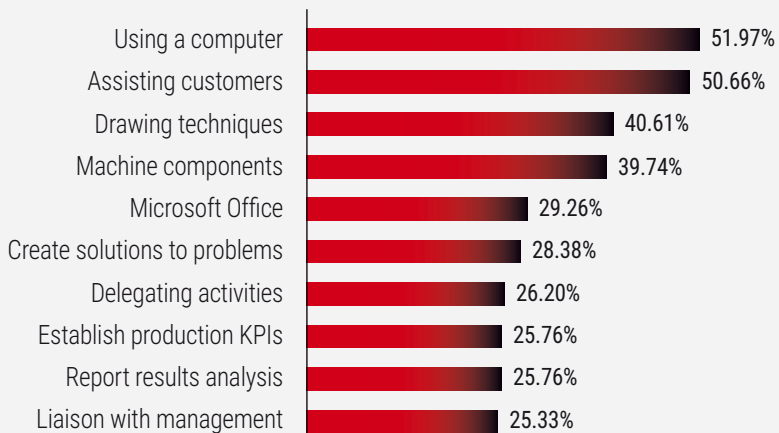
Research and development managers



Manufacturing supervisors



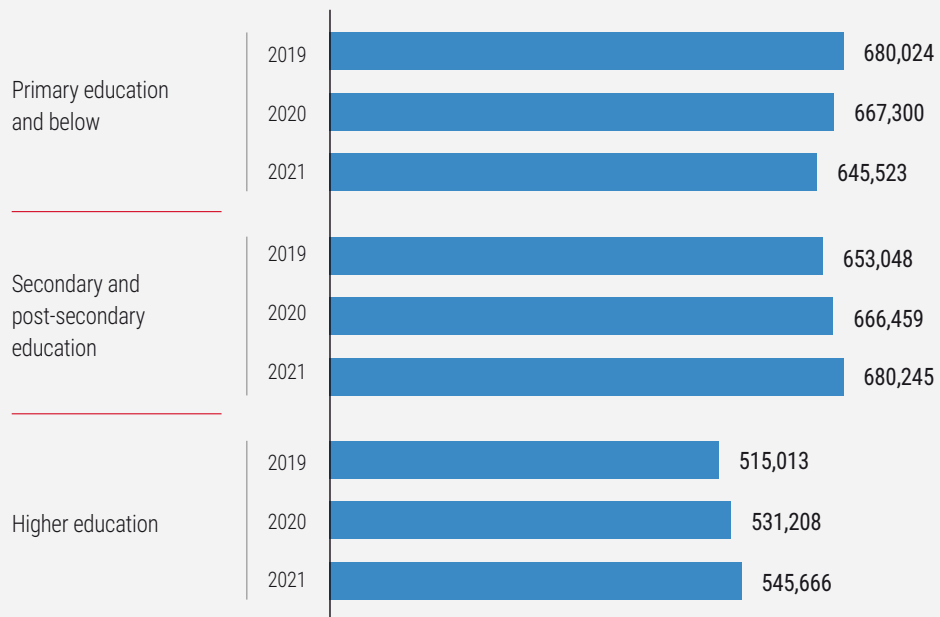
Engineering professionals not elsewhere classified



EVOLUTION OF THE WORKING AGE POPULATION

The high levels of education achieved in Basque society mean that year after year the working-age population with a lower level of education is decreasing and being replaced by new, more educated generations. Now, for the first time, the group of those with primary education is no longer in the majority.

Evolution of the working-age population by level of studies completed/education level



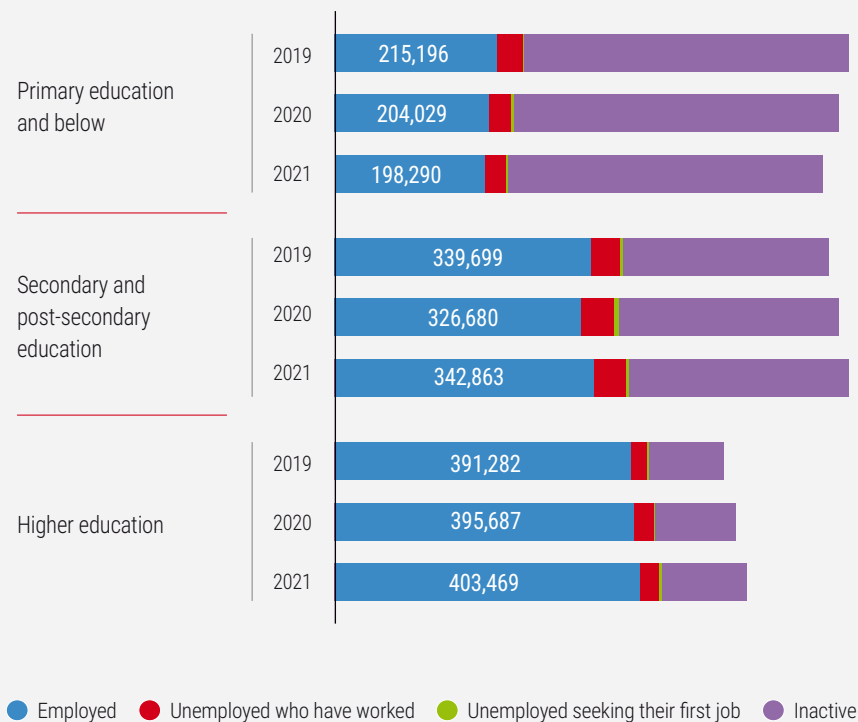
SOURCE: Compiled based on PRA microdata file (EUSTAT)

EVOLUTION OF THE POPULATION IN RELATION TO ACTIVITY

Consistent with the general evolution of the working-age population, there is a progressive reduction in the employed population with a lower level of education, whereas it is only the employed population with a higher level of education that is clearly growing.

It is worth noting that the population with a higher level of education is not in the majority, but it is in the majority among the employed population.

Evolution of the population in relation to activity by level of studies completed/education level

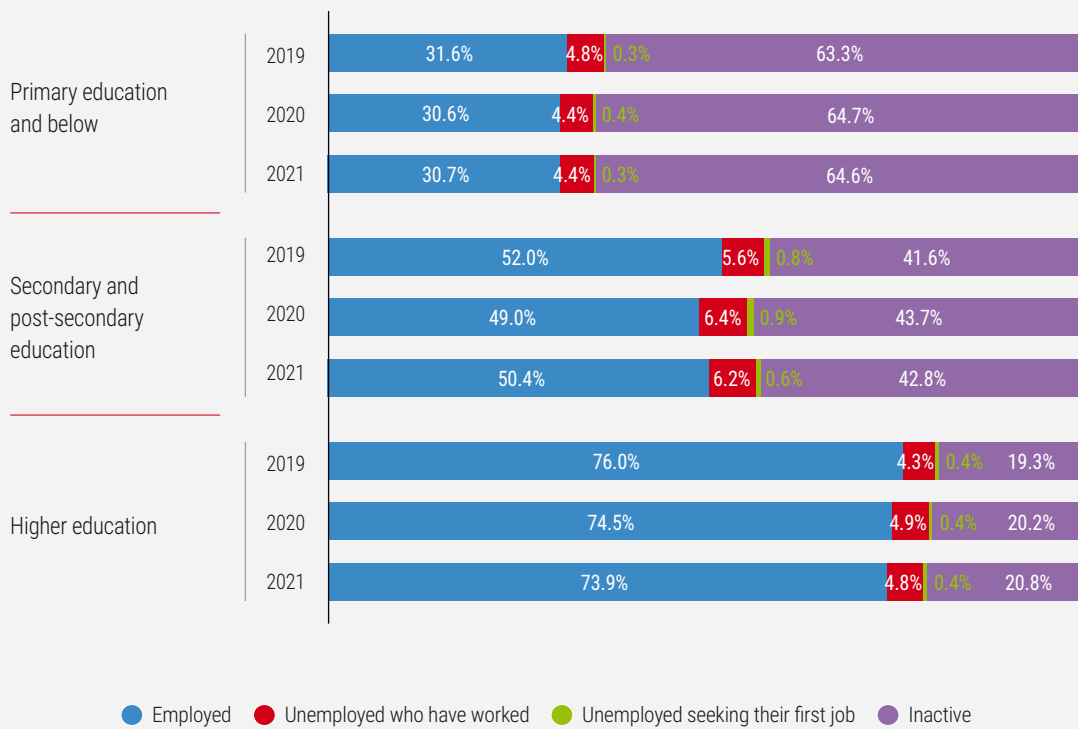


SOURCE: Compiled based on PRA microdata file (EUSTAT)

DISTRIBUTION OF THE POPULATION ACCORDING TO THEIR RELATIONSHIP WITH ACTIVITY

Within each education level segment, the weight of the employed population in the total has declined during the pandemic.

Distribution of the population in relation to activity by level of studies completed/education level

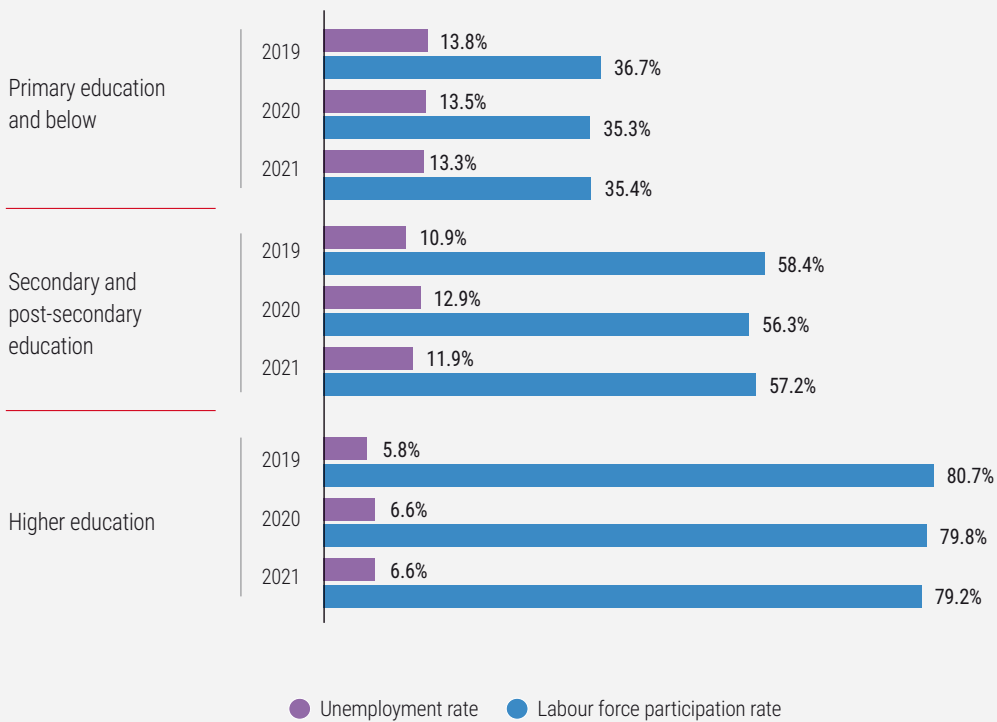


SOURCE: Compiled based on PRA microdata file (EUSTAT)

EVOLUTION OF THE UNEMPLOYMENT AND LABOUR FORCE PARTICIPATION RATES

Although the labour force participation rate and the employment rate have been affected by the pandemic, it could be said that, in general terms, the higher the level of education, the lower the unemployment rate and the higher the labour force participation rate.

Change in unemployment and activity rates by level of studies completed/education level

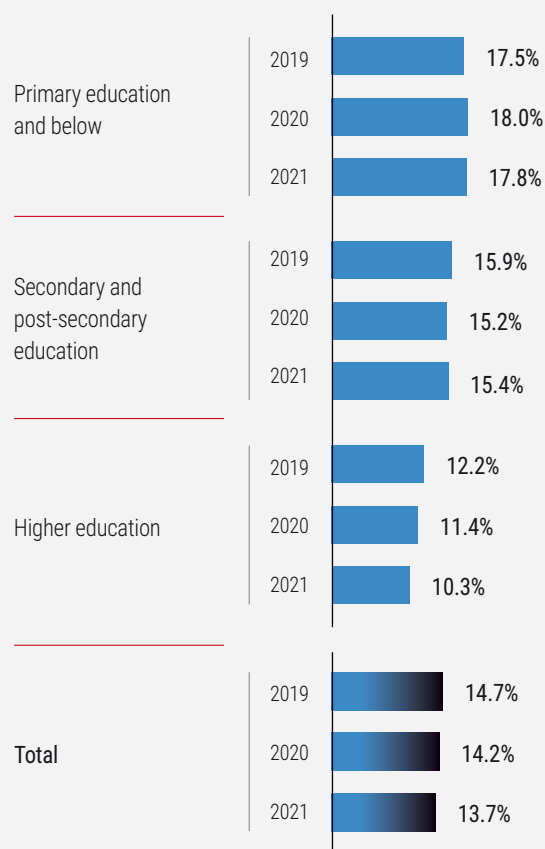


SOURCE: Compiled based on PRA microdata file (EUSTAT)

EVOLUTION OF SELF-EMPLOYMENT BY EDUCATION LEVEL

It is interesting to note that lower levels of self-employment are associated with higher levels of education.

Evolution of the level of the percentage of self-employment by level of studies completed/education level

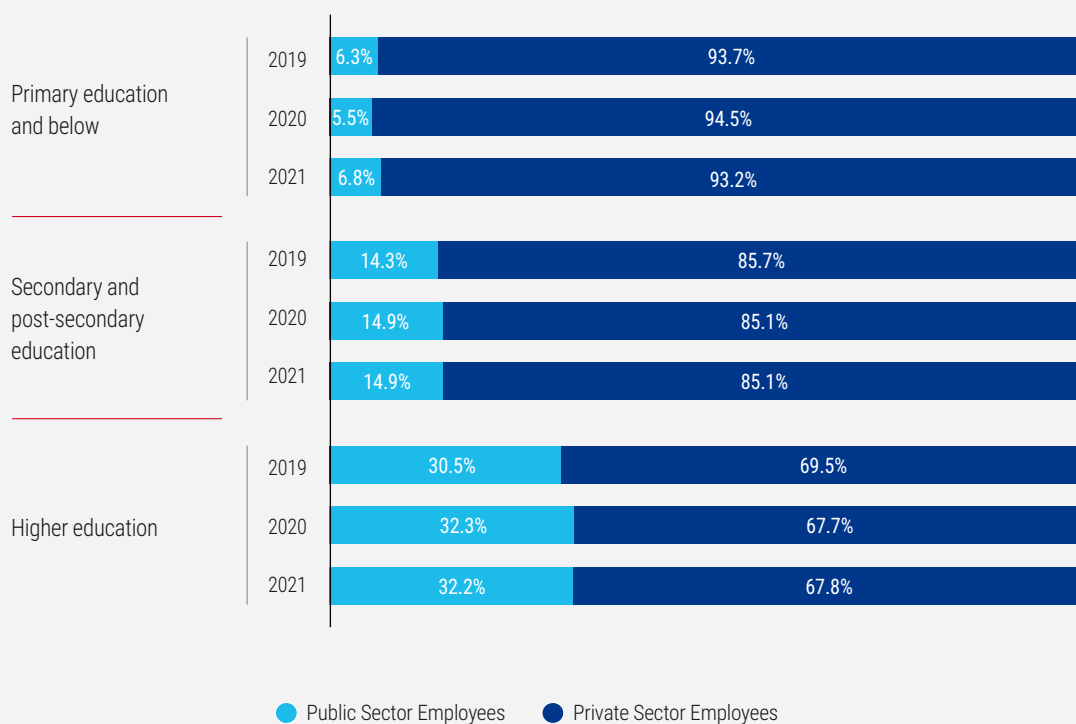


SOURCE: Compiled based on PRA microdata file (EUSTAT)

PUBLIC ADMINISTRATION AS A RECRUITER OF PROFESSIONALS

Contrary to what happens in the previous section, the weight of the public administration as an employer increases as the level of education rises.

Distribution of the employed population by institutional sector



SOURCE: Compiled based on PRA microdata file (EUSTAT)

TREND IN EDUCATION LEVELS IN THE DIFFERENT ACTIVITY GROUPS

There are areas of activity that are clearly changing the profile of their workers.

Distribution of the employed population by main activity, level of studies and year

Main activity	Primary education and below				Secondary and post-secondary education				Higher education			
	2019	2020	2021	T	2019	2020	2021	T	2019	2020	2021	T
Agriculture, livestock, forestry and fisheries	4,824	3,990	2,420		3,939	3,167	3,367		1,040	915	1,500	
Mining and quarrying; manufacturing; electricity, gas, steam and air-conditioning...	51,494	50,672	48,460		82,928	80,069	81,602		67,843	69,061	71,231	
Construction	20,823	19,587	18,946		19,460	18,305	21,620		11,058	11,755	12,878	
Wholesale and retail trade; motor vehicle repair; transport and storage; hotels and restaurants	67,114	63,819	66,966		99,519	97,853	100,133		56,684	59,412	54,941	
Information and communications	1,174	1,390	910		7,623	7,692	7,798		19,102	18,337	20,347	
Financial and insurance activities	1,380	1,102	1,343		5,166	4,755	3,222		14,006	14,082	14,193	
Real estate activities	302	198	191		1,870	1,068	2,141		2,810	1,753	2,516	
Professional, scientific and technical activities; administrative and support service activities	22,293	21,323	20,681		31,080	29,376	31,390		53,314	49,993	52,417	
Public administration and defence; compulsory social security; education; health and social services activities	20,468	17,921	17,249		60,789	57,699	60,501		147,217	151,182	155,589	
Arts, recreation, and leisure activities and other services	25,325	24,027	21,124		27,323	26,696	31,090		18,208	19,196	17,855	
Total	215,196	204,029	198,290		339,699	326,680	342,863		391,282	395,687	403,469	

T Trend

SOURCE: Compiled based on PRA microdata file (EUSTAT)

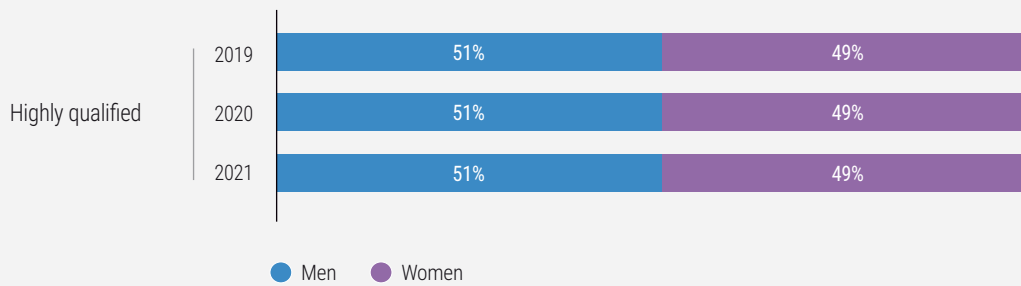
Evolution of the proportion of women in different occupations

Main occupation	Higher education PROPORTION OF WOMEN			
	2019	2020	2021	T
Directors and Managers	39.4%	38.2%	36.2%	
Scientific and intellectual technicians and professionals	60.6%	61.1%	62.2%	
Technicians; support professionals	45.6%	48.6%	47.9%	
Accountants, clerical and other office employees	77.4%	74.4%	70.8%	
Catering, personal services, protection, sales and sales workers, and the Armed Forces.	63.0%	63.1%	69.9%	
Skilled workers in the agriculture, livestock, forestry and fisheries sector	0.9%	5.8%	33.9%	
Craftsmen and skilled workers in the manufacturing and construction industries	11.0%	10.7%	8.8%	
Plant and machinery operators and assemblers	15.5%	13.4%	11.8%	
Elementary occupations	47.1%	55.4%	62.2%	
Total	55.1%	55.6%	56.1%	

T Trend F Feminised occupations B Balanced occupations M Masculinised occupations

SOURCE: Compiled based on PRA microdata file (EUSTAT)

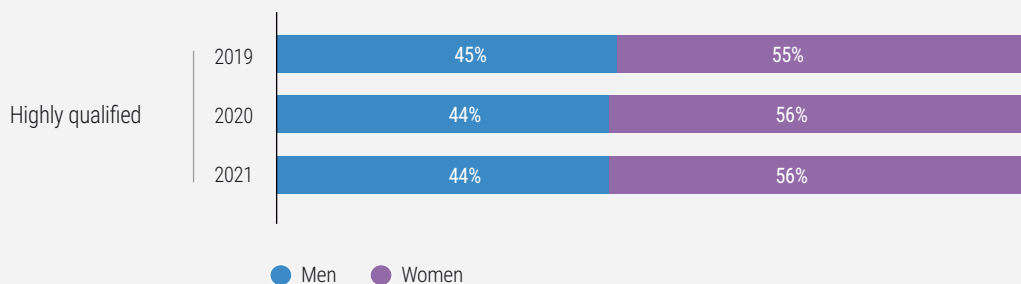
Evolution of the proportion of men and women in highly qualified profiles irrespective of their level of education



SOURCE: Compiled based on PRA microdata file (EUSTAT)

In highly qualified profiles the weight of women is higher, except in the case of “Directors and Managers”. That is, the weight of women is higher only in the case of “Scientific and intellectual technicians and professionals” and “Technicians; support professionals”.

Evolution of the proportion of men and women with higher education in high-skill profiles



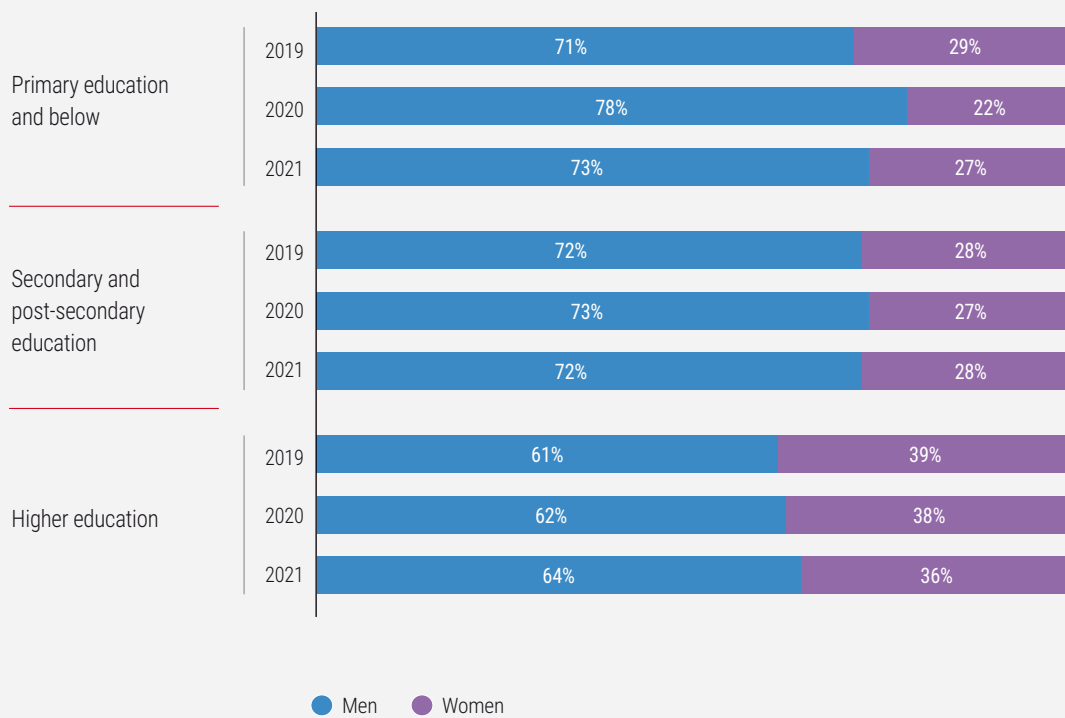
SOURCE: Compiled based on PRA microdata file (EUSTAT)

It is worth mentioning in this regard that:

- One out of every two people holding a managerial position has a secondary or primary education (49.6% according to data from 2021). It should be pointed out that the weight of the self-employed and small companies in more traditional services (e.g. hospitality, construction, auxiliary, etc.), due to their own structure, means that sometimes the direction/management coincides with the self-employed or entrepreneur him/herself.
- Seven out of ten uneducated managers are men.
- For managers with higher education, the probability that the manager is a woman is more likely than for managers with a lower level of education.

Evolution of the proportion of men and women with higher education in high-skill profiles

Directors and Managers

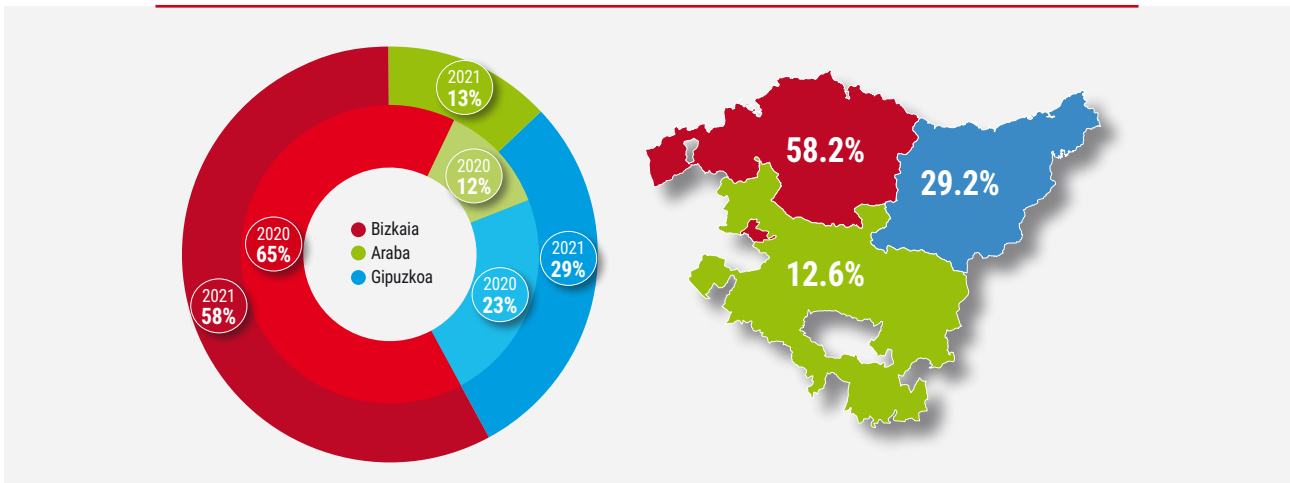


SOURCE: Compiled based on PRA microdata file (EUSTAT)

TRENDS IN HIGHLY SKILLED DIGITAL PROFILES

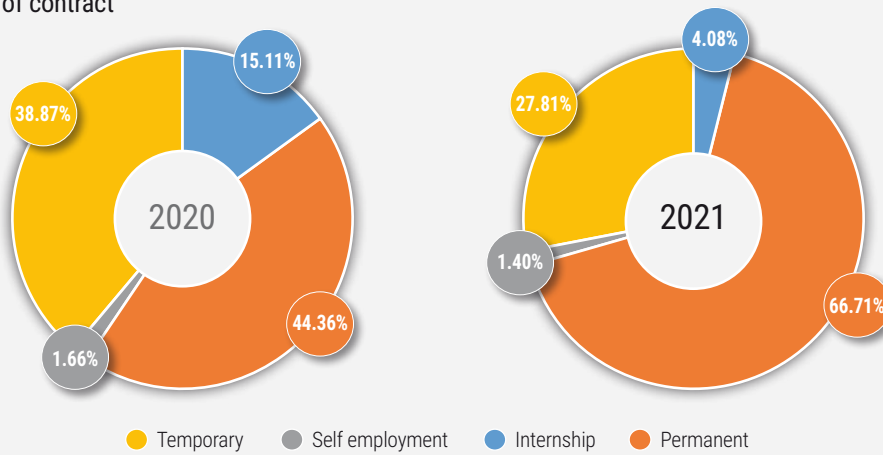
Between 1 January 2021 and 31 December 2021, a study was made of a total of 1,898 highly skilled job offers seeking digital profiles.

Analysing the geographical location of the offers, Bizkaia was the historical territory with the most job offers posted (58.2%), followed by Gipuzkoa (29.2%) and Araba (12.6%).



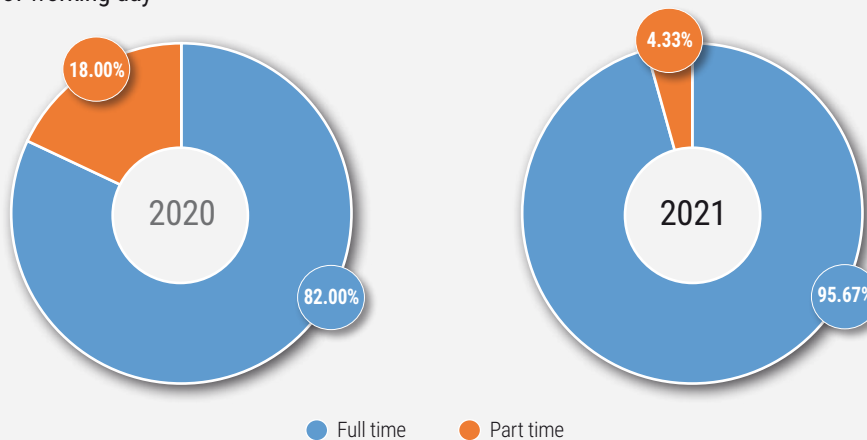
Analysis of digital profiles (overall)

Type of contract

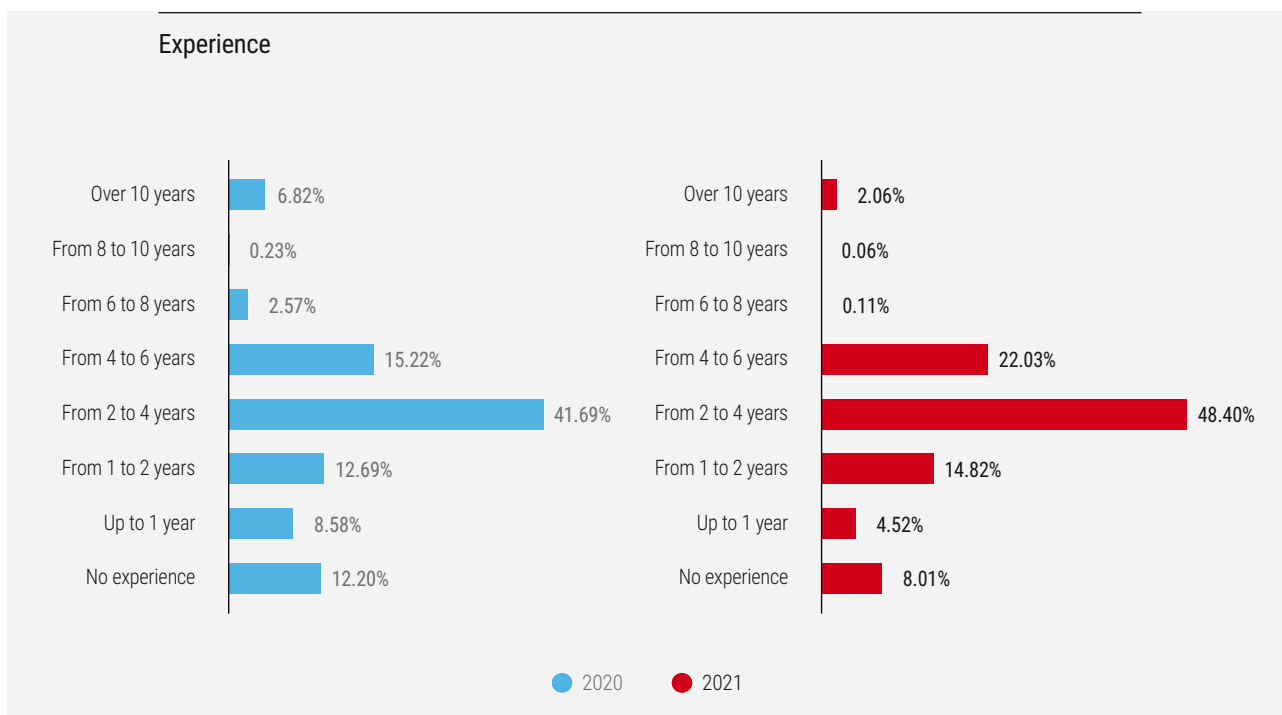


With regard to contract types, there has been an increase of over 20% in permanent contracts between 2020 and 2021. However, the number of temporary and internship contracts has declined considerably.

Type of working day



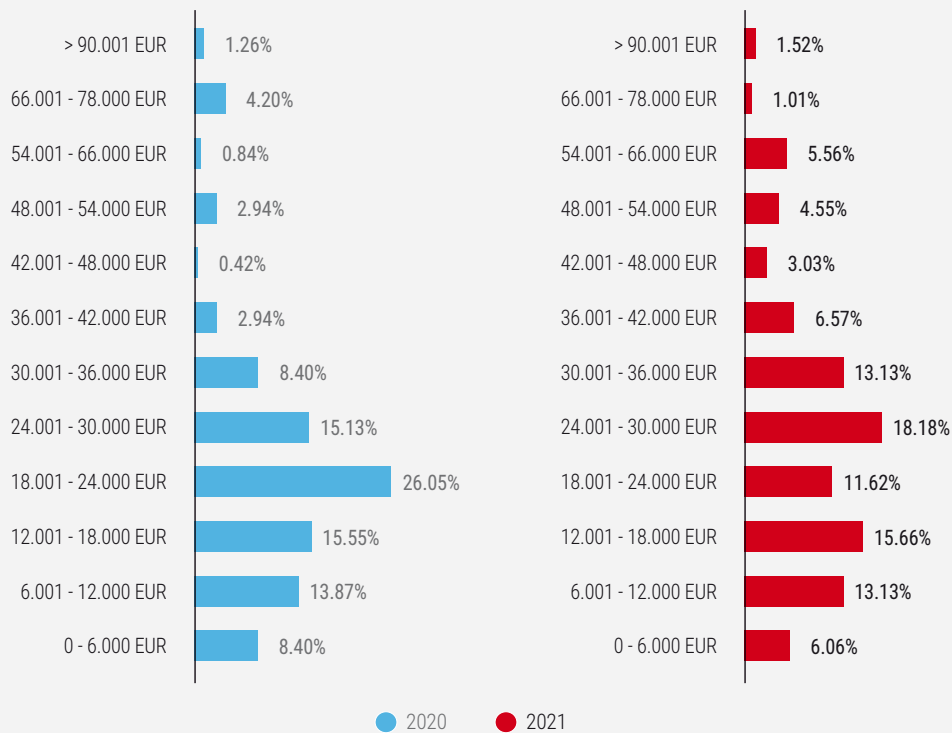
An upward trend in the working hours per day offered in the contracts was also observed, with 82% full-time contracts in 2020 as compared to 95.67% in 2021.



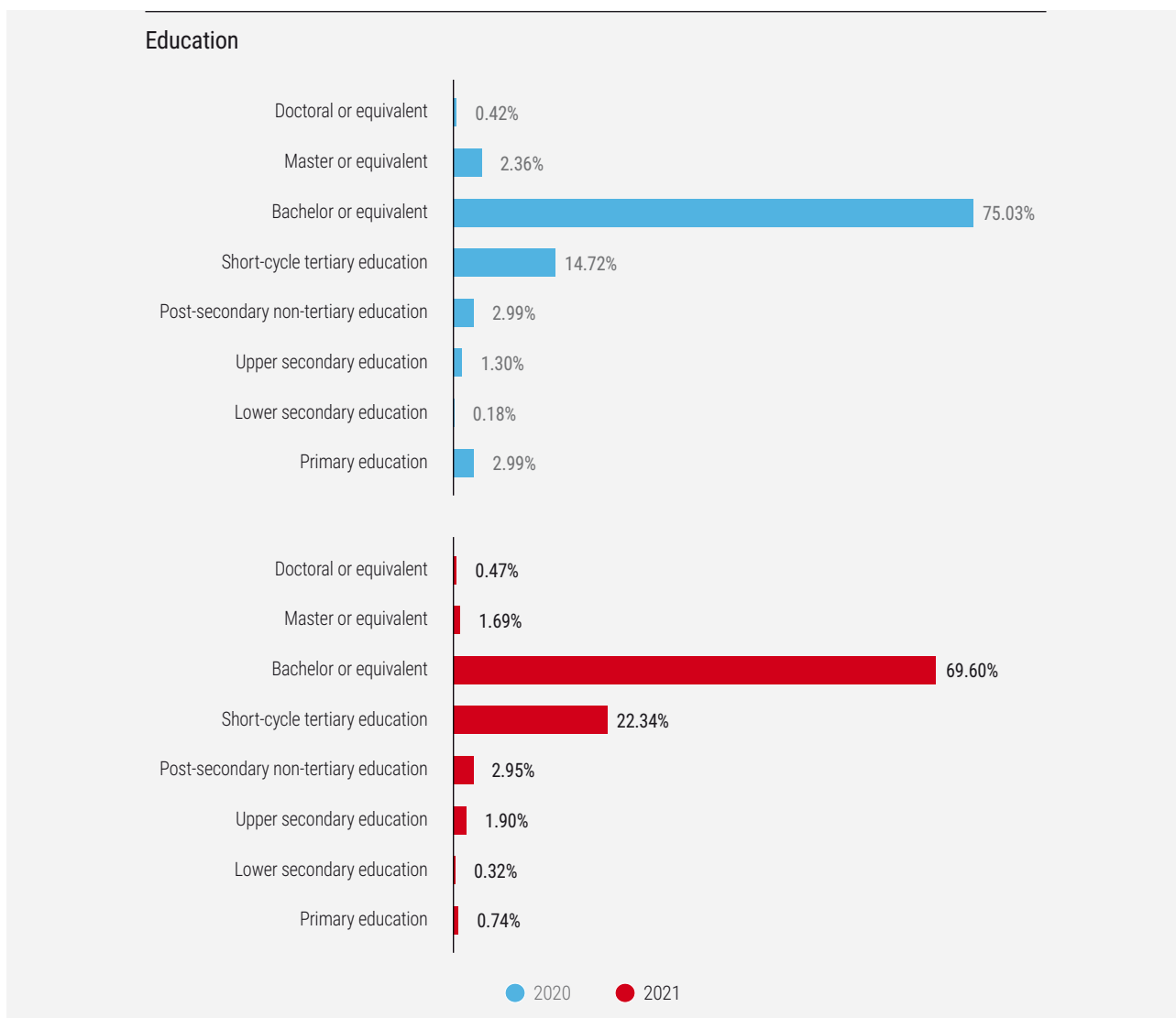
As to the experience preferred in the job offers, there was a significant increase in the 2-6 years' experience bracket, required in 56.91% of the offers in 2020 and 70.43% in 2021, while there was a considerable reduction in requests for profiles with experience of more than 10 years or less than 1.

Salary

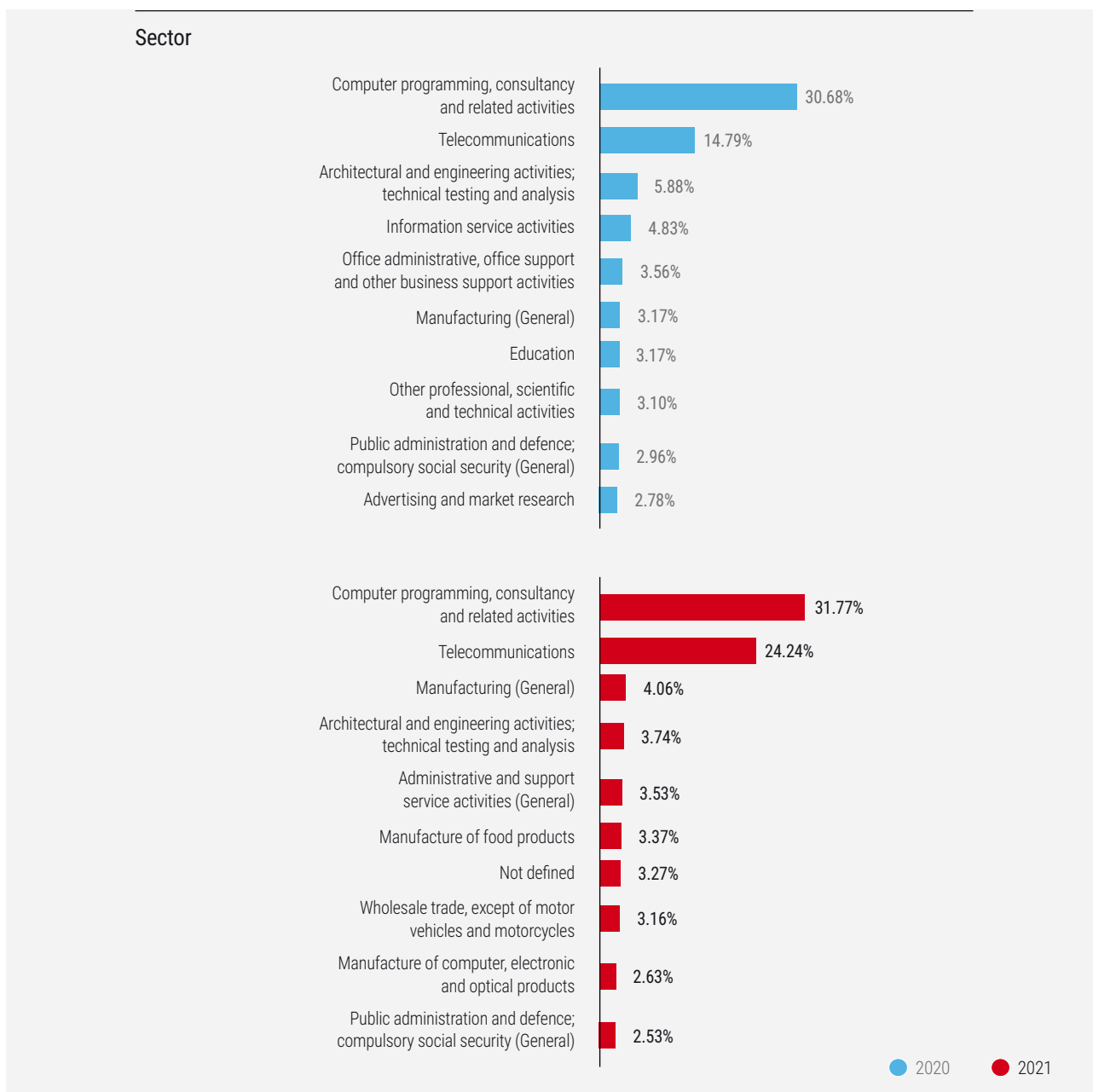
*The salary was only shown in 8.38% and 10.43% of the offers analysed in 2020 and 2021 respectively.



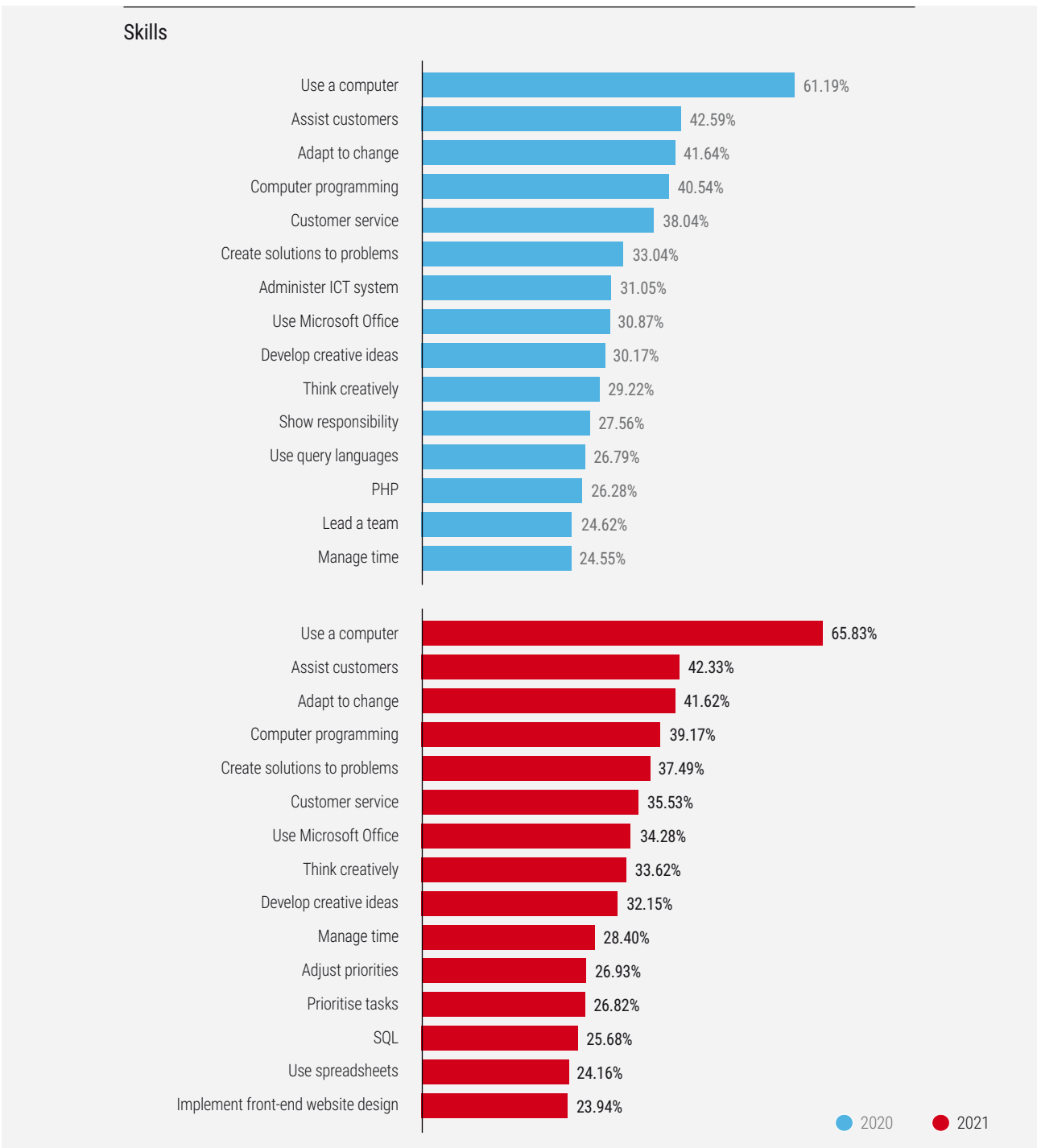
Although this information was only shown in 10.43% of the offers in 2021 (and 8.38% in 2020), it certainly provides some hints regarding the increase in the salaries proposed by companies for digital profiles. Whereas in 2020 offers with remuneration below 24,000 euros per year accounted for 63.87%, in 2021 they only made up 46.47%. Similarly, offers with wages between 30,000 and 66,000 euros per year rose from 15.54% in 2020 to 32.84% in 2021.



With regard to the level of education required in the job offers, a university degree continues to be the most sought-after level, although there is a major trend towards advanced vocational training graduates, who were targeted by 22.34% of job offers in 2021 as compared to 14.72% in 2020.



As to the sectors seeking digital profiles, the computer programming and consultancy and telecommunications sectors are the two with the largest combined offer of vacancies, together accounting for 45.47% of the offers in 2020 and 56.01% in 2021. The increase in the telecommunications sector should be highlighted as it has gone from representing 14.79% of the offers in 2020 to 24.24% in 2021, giving an idea of the current status of this sector.



Although there has been practically no change with regard to technical (hard) skills sought in job offers, an increasing trend towards more cross-cutting (soft) skills can be observed, particularly those related to creative problem-solving, creative thinking,

priority adjustment and time management, together with customer focus, which all have a progressively higher weighting in the job offer requirements of companies seeking technological profiles.

In conclusion, the labour market is offering better conditions regarding job stability and wage terms, and we would postulate that this is due to the existence of a greater supply and demand mismatch for these digital profiles (increasingly less supply to meet the companies' needs).

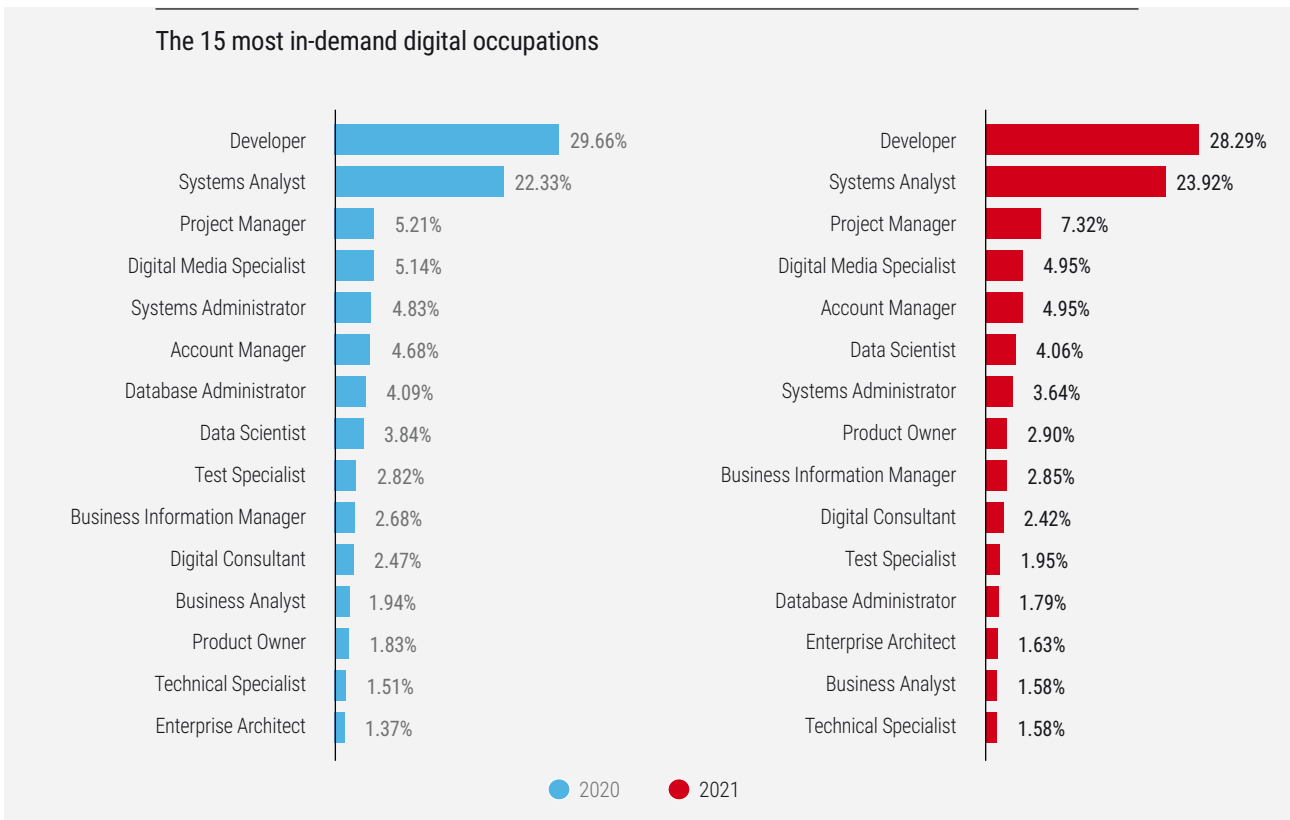
At the same time, this talent shortage is progressively opening up more doors to advanced vocational training graduates, with an increasing demand for this profile in job offers.

As to experience, different studies show that the offers as a whole have increasingly less demand for profiles with long-standing experience (over 10 years), possibly due to the fact that the profiles sought today are of the "newly-created" type, for emerging technologies that have only existed for a very short time. This means that the trend is now to seek medium-term experience, between 2 and 6 years, which is the length of experience required in 70% of cases.

Telecommunications is the sector that has evolved the most in seeking this type of profiles, with a 63% increase on the previous year (the percentage of this profile type for the telecommunications sector has gone from 14.79% of the offers in 2020 to 24.24% in 2021).

With regard to the skills required, the more cross-cutting and less technical skills have become more important in the search for professionals with digital profiles, particularly those relating to time and priority management and creative thinking for problem-solving, and with an increasingly heavier weighting of customer focus.

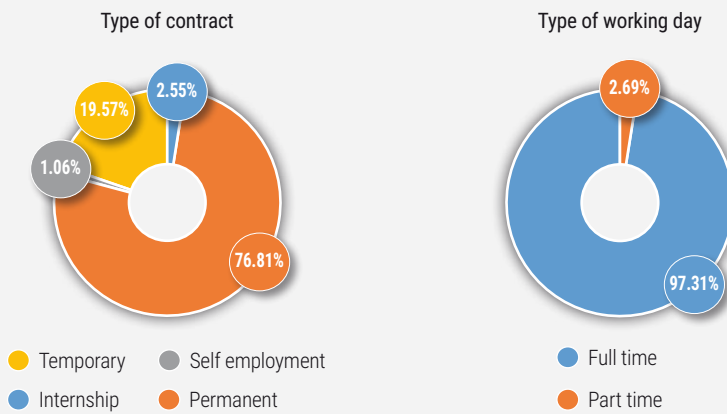
The 15 most in-demand digital occupations in 2020 and 2021



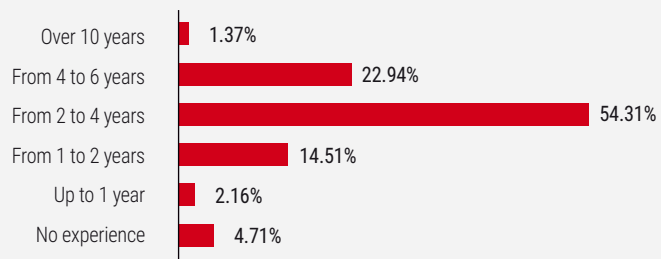
Analysis of the 5 most in-demand digital occupations in 2021

Developer

These account for 28.29% of the ICT offers.

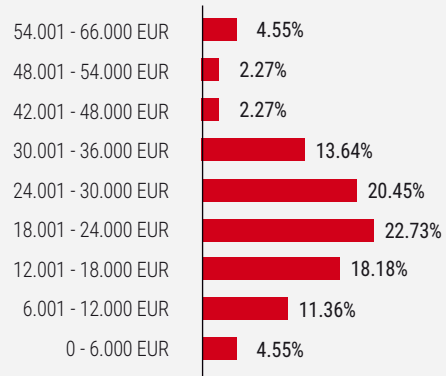


Experience

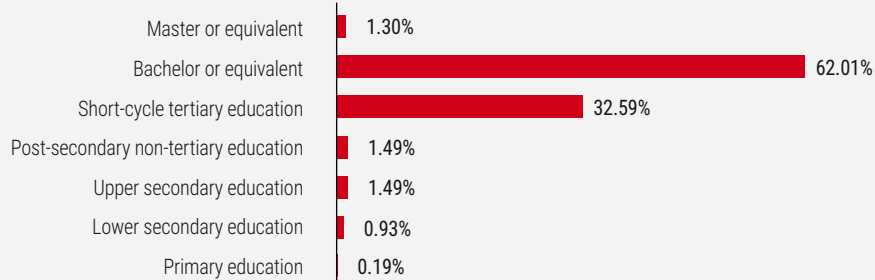


Salary

*The salary is only shown in 8.19% of the offers analysed.



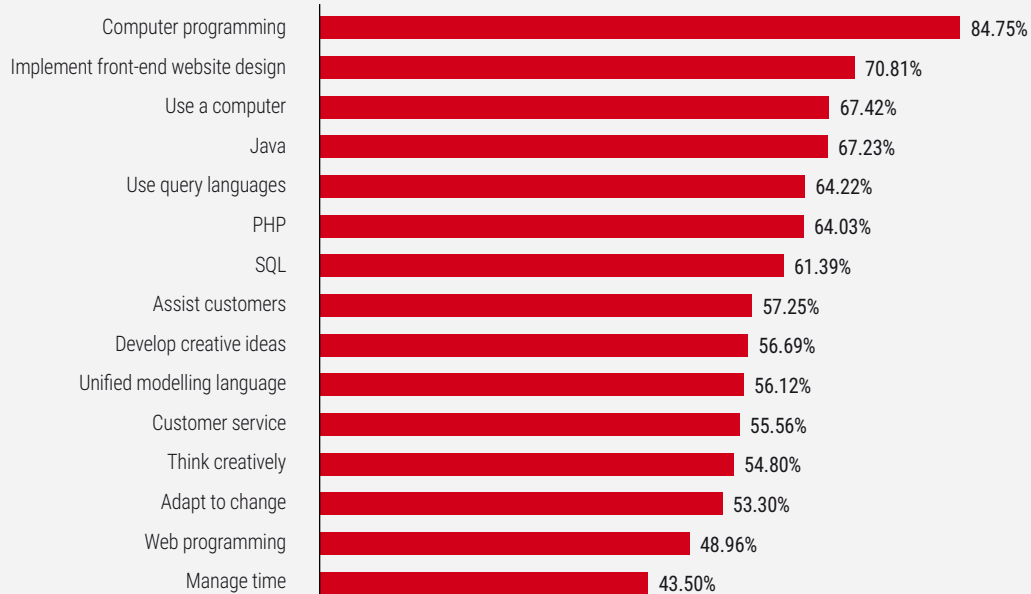
Education



Sector



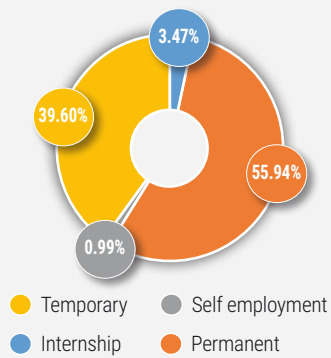
Skills



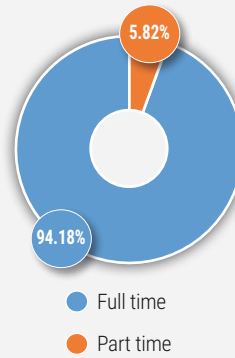
Systems analyst

These account for 23.92% of the ICT offers.

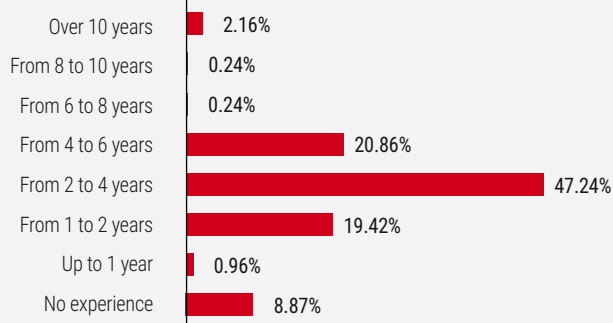
Type of contract



Type of working day

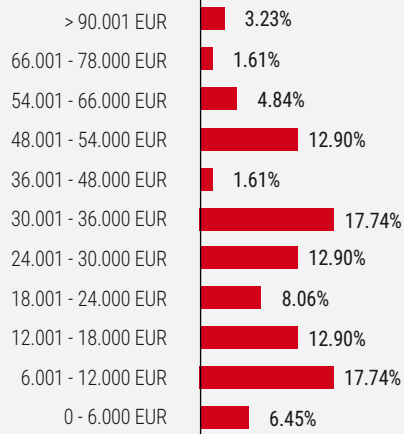


Experience

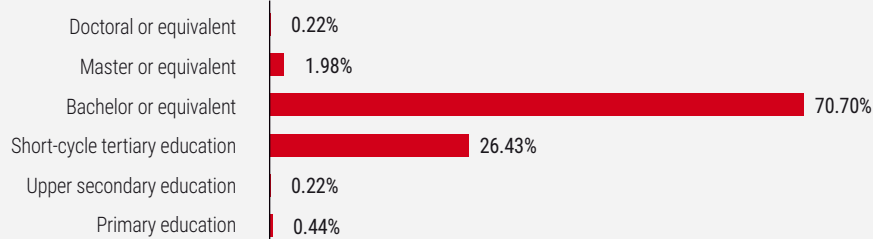


Salary

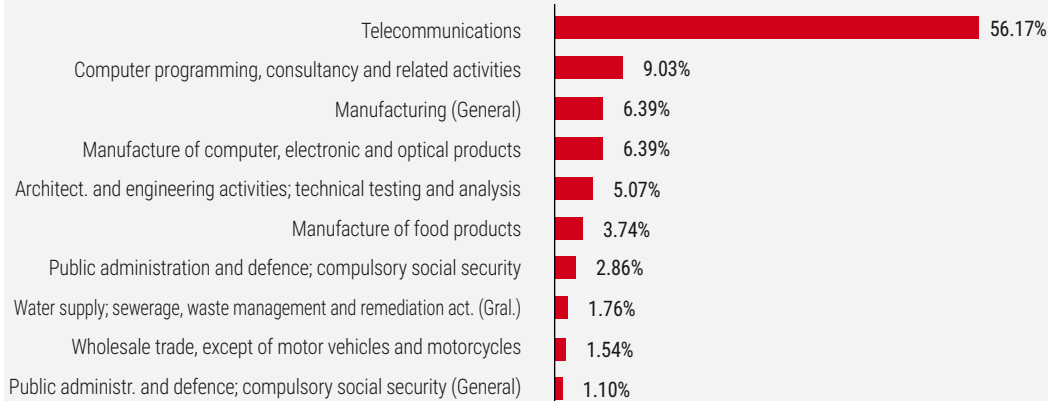
*The salary is only shown in 13.66% of the offers analysed.



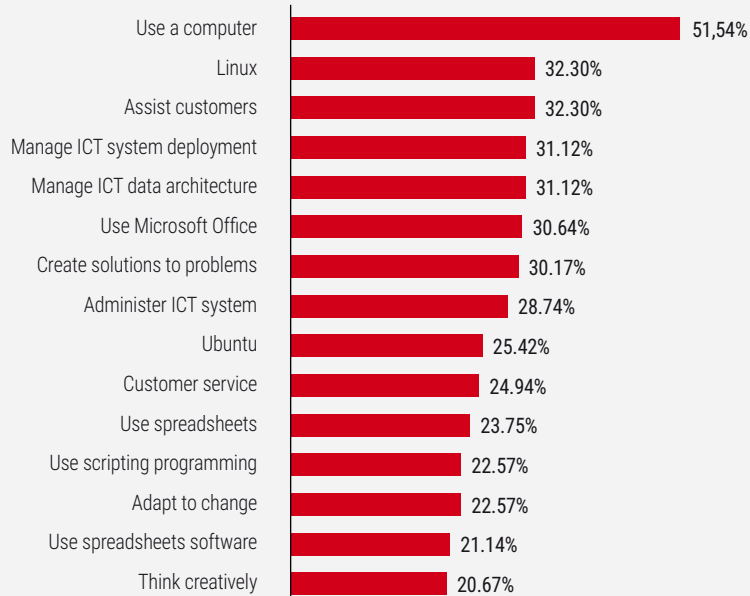
Education



Sector



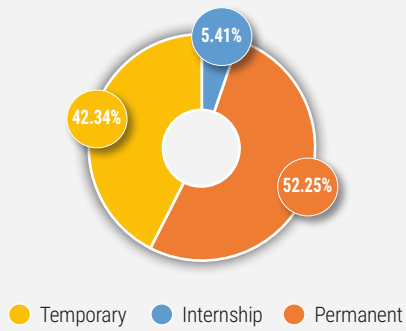
Skills



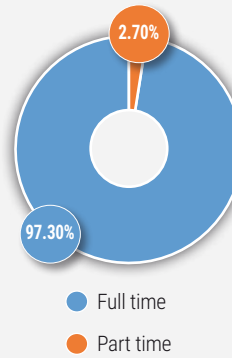
Project manager

These account for 7.32% of the ICT offers.

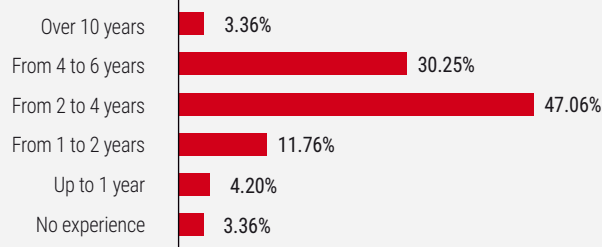
Type of contract



Type of working day

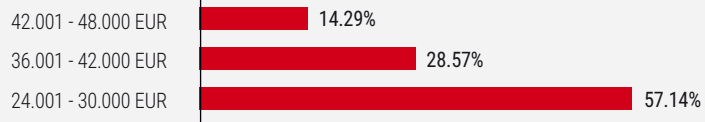


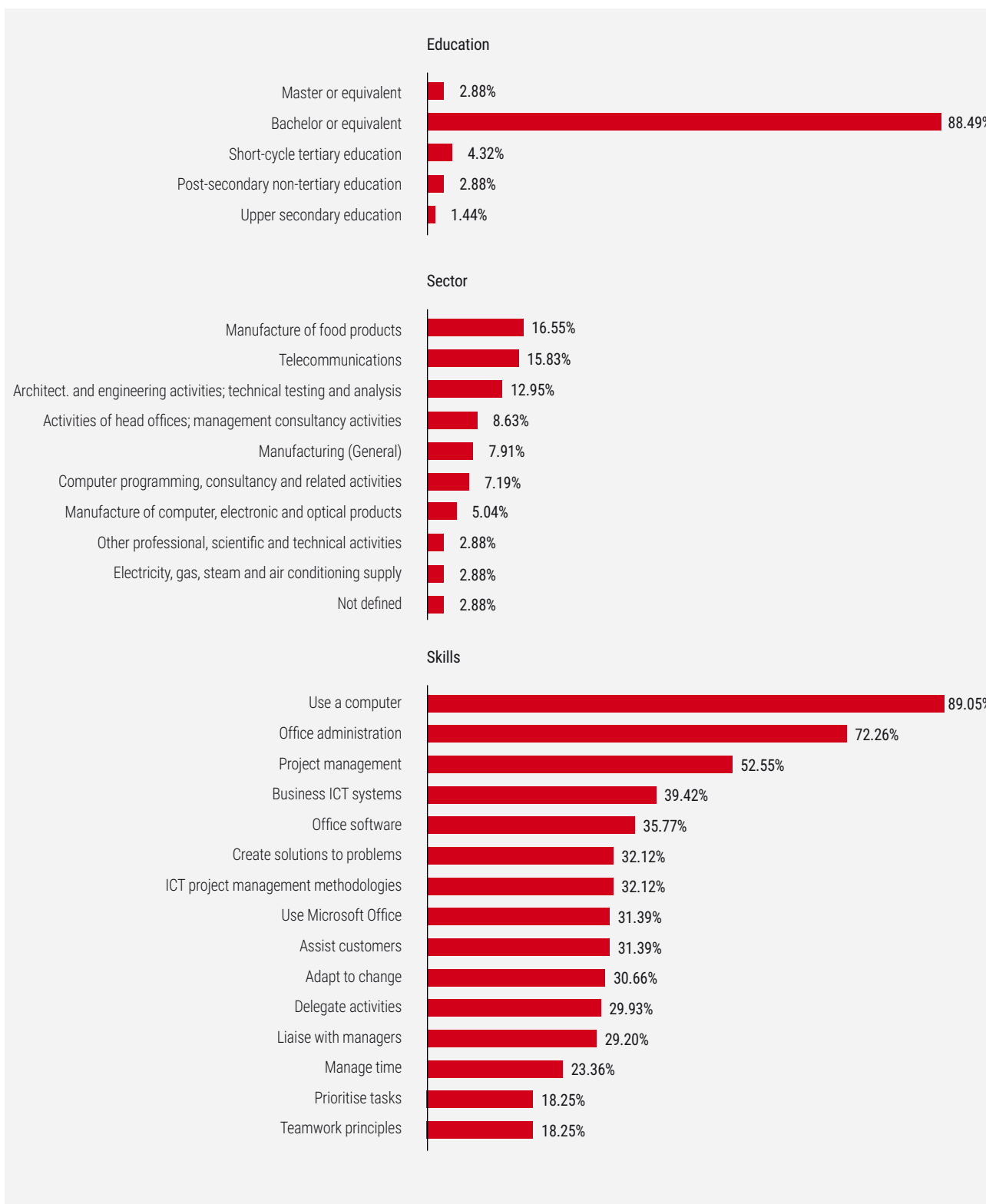
Experience



Salary

*The salary is only shown in 5.40% of the offers analysed.

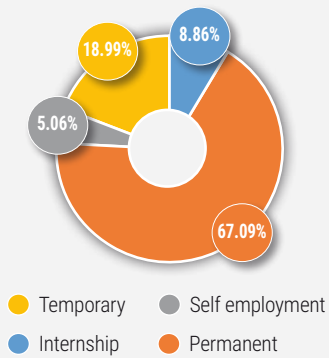




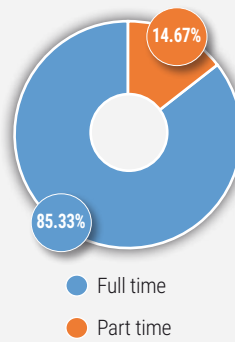
Digital media specialist

These account for 4.95% of the ICT offers.

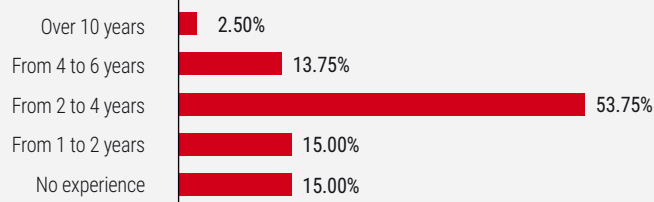
Type of contract



Type of working day

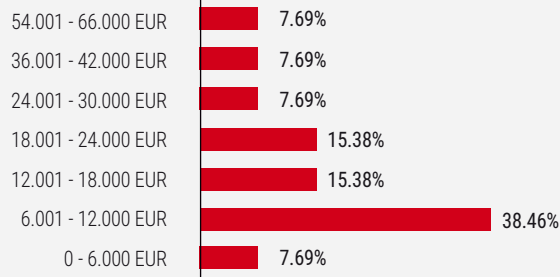


Experience

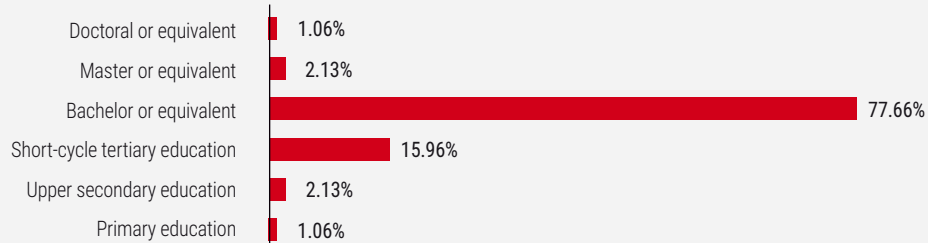


Salary

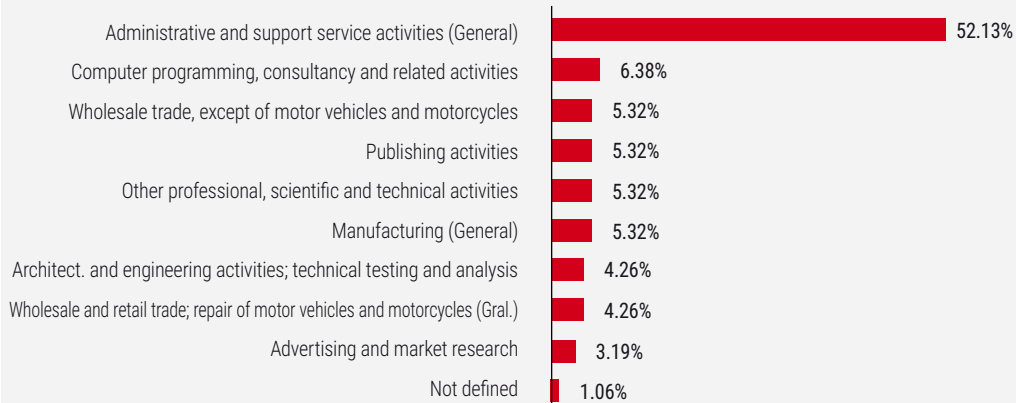
*The salary is only shown in 13.83% of the offers analysed.



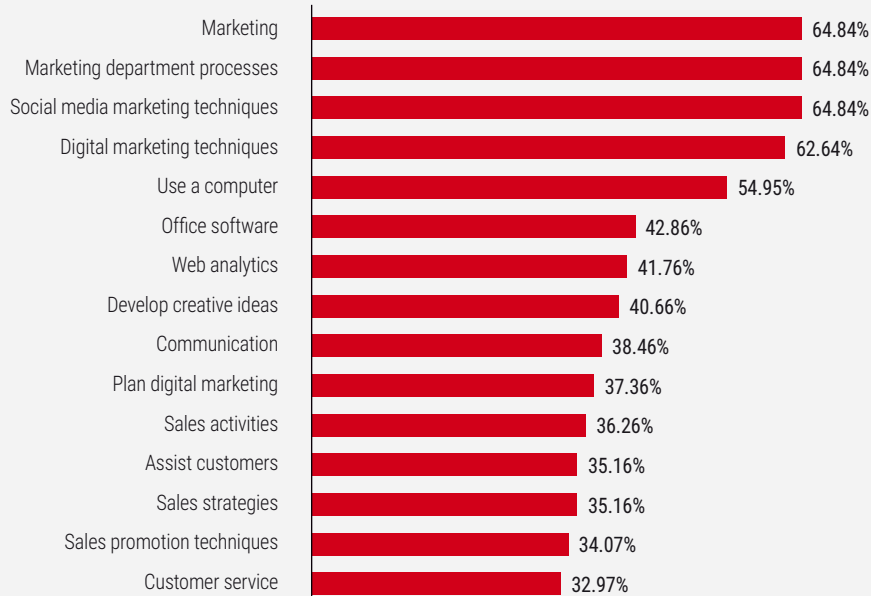
Education



Sector



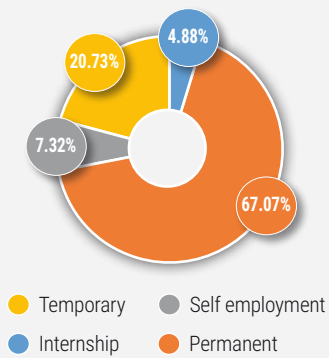
Skills



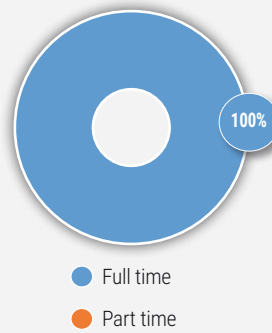
Account manager

These account for 4.95% of the ICT offers.

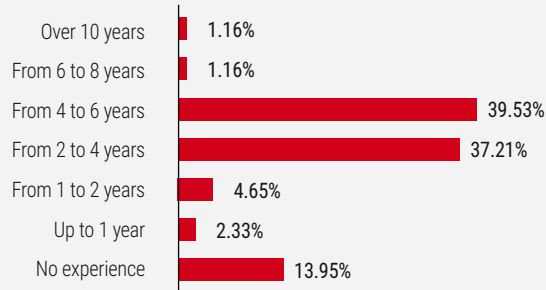
Type of contract



Type of working day

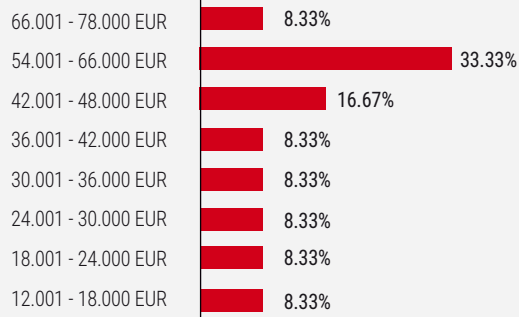


Experience

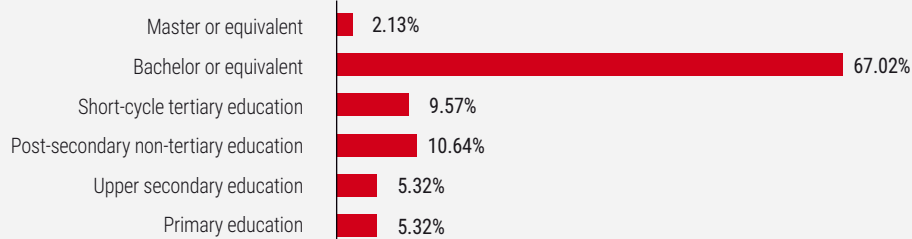


Salary

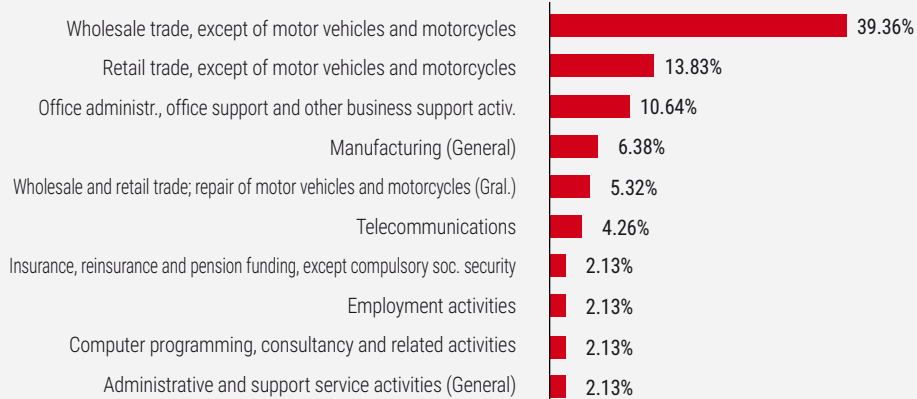
*The salary is only shown in 12.77% of the offers analysed.



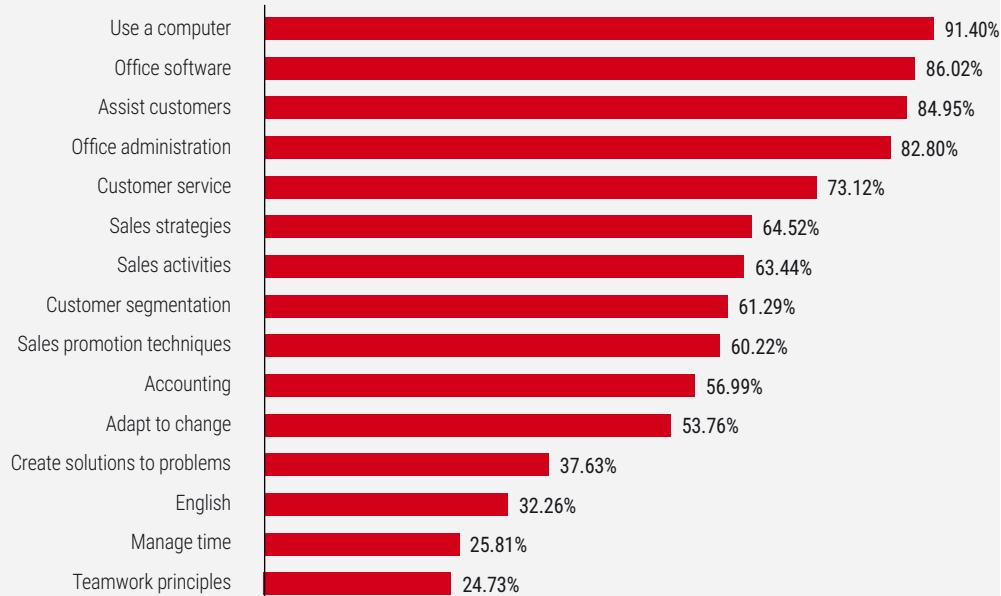
Education



Sector



Skills



ACKNOWLEDGEMENTS

We would like to thank our partners, organisations from the public, private and academic sectors, for the support they have given to Bizkaia Talent and for their commitment to the development of Bilbao/Bizkaia/Basque Country based on collaboration and advanced knowledge.



We would also like to thank all the people and organisations that have contributed with their opinions and accounts to the preparation of this report, as well as the 520 Basque organisations and the almost 18,000 professionals in our network for their trust and collaboration with Bizkaia Talent.



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