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**Biscay Tourism
Intelligence System
Preliminary Study for
UNWTO INSTO Network**

February 2022



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LIST OF ACCRONYMS

BBAG	BILBAO BIZKAIA ACTION GROUP
BTIS	BISCAY TOURISM INFORMATION SYSTEM
DFB	DIPUTACIÓN FORAL DE BIZKAIA [BISCAY PROVINCIAL COUNCIL]
EUSTAT	BASQUE INSTITUTE OF STATISTICS
INE	SPANISH NATIONAL STATISTICS INSTITUTE
INSTO	INTERNATIONAL NETWORK OF SUSTAINABLE TOURISM OBSERVATORIES
SDGs	SUSTAINABLE DEVELOPMENT GOALS
UNWTO	UNITED NATIONS WORLD TOURISM ORGANISATION

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1. BIZKAIA TOURISM DESTINATION

1.1. Socio-economic context

Biscay is one of the provinces that make up the Basque Country. The province is located in the north of the Iberian Peninsula and limits to the north with the Cantabrian Sea, to the east with Gipuzkoa, to the south with Álava and Burgos and to the west with Cantabria.



Figure 1 Location of Biscay/Bizkaia

The official languages are Spanish and Euskera (Basque). Biscay is made up of 112 municipalities organized in seven counties/subregions: Encartaciones, Gran Bilbao, Uribe, Arratia-Nervi3n, Durangaldea, Lea-Artibai and Busturialdea-Urdaibai. Its capital, and most populated city, is Bilbao. The area of the province is 2,217 km², and this makes it the second smallest province in Spain, but it is the ninth most populated (1.159.443 inhabitants) and the third in population density (522,97 inhabitants / km²). The majority of the population lives in Bilbao's metropolitan area, which is the sixth largest metropolitan area in Spain.

52% of the Basque Country's population lives in Biscay.

33.896€ per capita in 2019. Well above the State, similar to that of Europe's fully industrialised regions, and also above the EU-28 average.

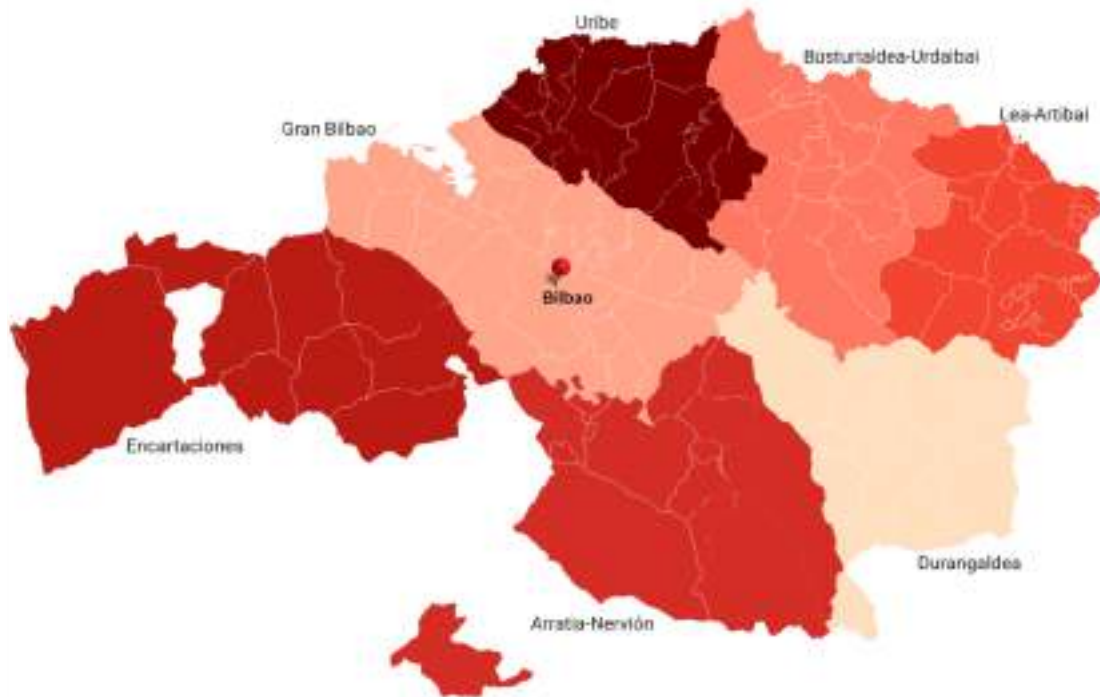


Figure 2 Biscay's subregions/counties

Basque industry accounts for 23.5% of GDP, and its main features are efficiency, quality, technical excellence and its commitment to internationalisation. It offers an attractive business environment, legal certainty, the coverage of its own financial system and high levels of self-governance. A joint effort by all public institutions and their collaboration with the private sector have made the Basque Country one of Europe's most competitive and attractive European regions for investment.

Ranked 4th in the EU in terms of per-employee productivity.

Ranked 8th in the EU in terms of per capita income (GDP).

Ranked 8th in the United Nation's Human and Economic Index 2014.

As part of economic development policy, industry has always received specific incentives due to its great impact on wealth, employment, technology development and the promotion of other added-value sectors. It is a region brimming over with talent. It has renowned R+D centers working side by side with the authorities to implement new production processes, enhance current processes and deploy Industry 4.0.

The Basque Country's institutions have produced financial support mechanisms through programmes focusing on investment, innovation and the internationalisation of business. With only 4.7% of the population of Spain, exports (chiefly to France and Germany) account for almost 9% of the total figure for the Spanish state.

Head office of leading multinationals. Companies based in the Basque Country lead the way in fiercely competitive sectors such as energy, aeronautical construction and rail infrastructures, bioscience, automotive, machine tools and shipping, among others. Companies with a strong international presence, generating a significant flow of business travelers. Euskadi's location and the sound reputation of its honest, serious business fabric are highly valued guarantees that have helped create a recognised and attractive country brand - Basque Country. The Basque Government brought in over 476 million euros of foreign investment between 2014 and 2019 for 136 business projects, most of which came from Germany, the United States and the United Kingdom.



Figure 3 Biscay multinationals.

1.2. Connectivity



Bilbao is a global interconnected city thanks to its airport, northern Spain's largest, a modern port, an extensive modern road network, and a local rail service to most Basque towns.

Catchment area



This is northern Spain's main airport, and the Basque Country's principal external connectivity hub.

Bilbao airport is one of the most outstanding expressions of the renewal and new strength of the city of Bilbao. It is located 12 kilometers away from the capital of the Biscay province.

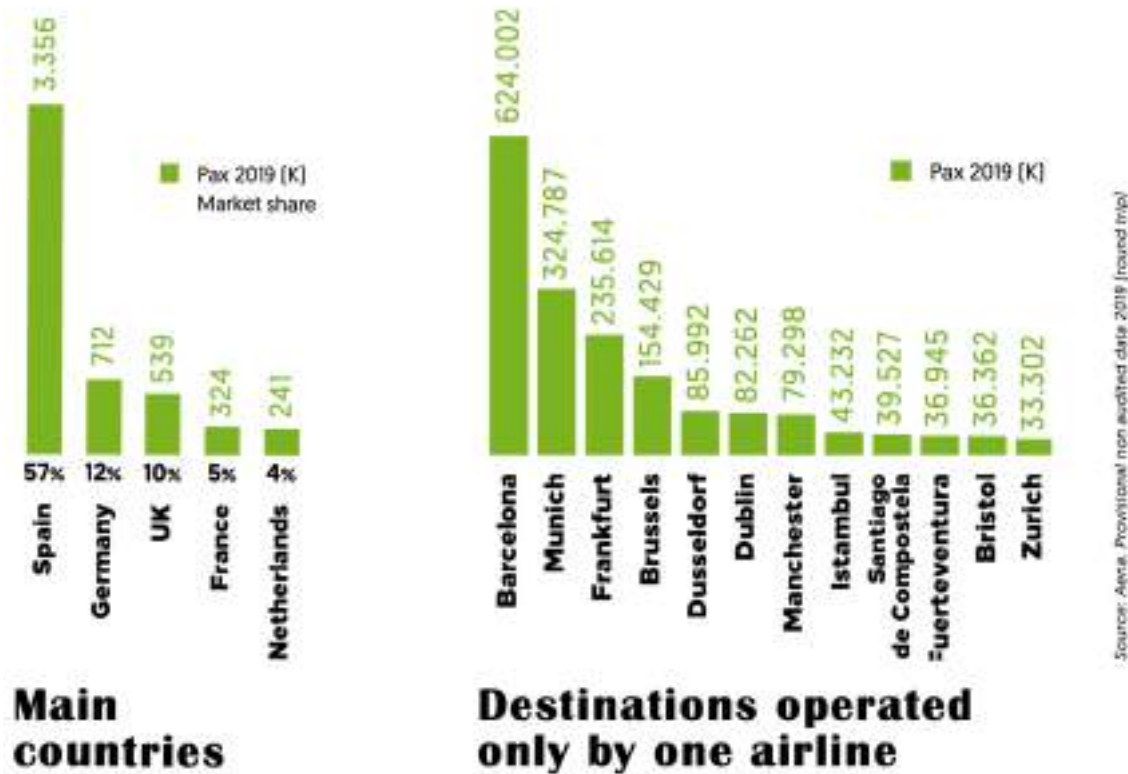
2.580.911 passengers in 2021.

5.905.782 passengers in 2019.

Over the last few years, Bilbao's airport has effectively faced constant traffic growth, primarily domestic, but also increasingly international, thanks to its good connecting flights to the continent's major hub airports and the main tourist cities and business centres. 46,4% of the traffic is international, 46% traditional airlines, 54% low-cost airlines. With over 50 destinations, the

Basque airport serves its entire area of influence with a renewed infrastructure in terms of commercial services, with shops adapted to the profile of the typical passenger and a restaurant area with brands recognised worldwide, whilst keeping in touch with Basque gastronomy.

In addition, plans are under way to expand its passport control area, enabling EU passengers to use a new automatic system to quickly scan their identity documents.



Graph 1 Main destinations connected with Bilbao airport.

Air connectivity is essential to the city of Bilbao and the territory of Biscay to make them competitive as a tourism destination and promote economic development. In this regard the “Bilbao Biscay Action Connectivity Group” (formed by Basque Government, Biscay Provincial Council, Bilbao Town Hall, Aena-Bilbao Airport and Bilbao Air, along with the Chamber of Commerce is part of Bilbao Bizkaia Action Group (BBAG), which will be explained later in the governance section) is implementing a strategy with perfect coordination of all parties involved to facilitate the implementation or growth of airlines as a single interlocutor.

The connectivity strategy positions Euskadi as the main reference of this activity, as the gateway to the Bay of Biscay, providing access to the Basque universe, looking ahead to consolidation of the Basque Country as a destination and the generation of new traffic inflows and outflows.



Figure 4 Destinations connected directly with Bilbao airport, summer 2022

General objectives concerning connectivity:

- To boost the number of visitors to the Basque Country to drive tourism and the economy.
- To facilitate the globalisation of Basque businesses to connect them to key cities for the purposes of innovation and global economic development.
- To offer better connectivity so that passenger experiences bring about a better standard of living and greater demand for air transit services.

Generating new point-to-point connections and enhancing the existing connections. Public demand and the business fabric are marking out the path, and are calling for new point- to-point connectivity with other major cities:

- France (Strasbourg, Lyon, Marseilles)
- The United Kingdom (Liverpool, Belfast, Glasgow, Birmingham)

-
- Italy (Genova, Bologna, Turin) - Portugal (Porto)
 - Spain (Almería)
 - The Nordic Countries (Copenhagen and Helsinki, Billund, Gothenburg, Reykjavik)
 - Germany (Hannover, Bremen, Cologne)
 - Poland (Warsaw, Cracow)
 - Ireland (Cork)
 - Russia (Moscow)
 - Hungary (Budapest) - Bulgaria (Sofia)
 - Israel (Tel Aviv)
 - Morocco (Casablanca)

Existing connections must also be reinforced with Lisbon, Dublin, Zurich, Edinburgh and Oslo. Commencement of a long-haul connection with North America. With respect to the American continent, one essential milestone is to set up the first direct connection with the United States (New York). At some point in the future consideration could be given to setting up connections to countries in the Americas with traditional links to Euskadi such as Mexico, Argentina and Brazil.

In addition, Bilbao Airport is working with the following airlines for the different destinations:

- Aer Lingus: Dublin
- Air Arabia: Tangier; Air Europa: Majorca, Tenerife, Lanzarote, Ibiza, Menorca
- Air France: Paris CDG
- Air Nostrum: Valencia, Vigo, Funchal
- Blue Air: Bucharest
- British Airways: London Heathrow
- Brussels Airlines: Brussels
- Easyjet: Bristol, Geneva, Manchester, London-Gatwick, Milan;
- Edelweiss Air: Zurich
- Eurowings: Stuttgart, Dusseldorf, Hamburg
- Iberia: Madrid
- KLM: Amsterdam
- Norwegian: Oslo; Lufthansa: Frankfurt, Munich
- TAP: Lisbon
- Transavia: Eindhoven, Paris-Orly
- Turkish Airlines: Istanbul
- Volotea: Valencia, Malaga, Alicante, Castellón, Menorca, Palma, A Coruña, Ibiza, Venice, Cagliari, Naples, Porto, Athens

Biscay Tourism Intelligence System candidacy to UNWTO INSTO Network

- Vueling: Lanzarote, Malaga, Alicante, Barcelona, Fuerteventura, Granada, Ibiza, Gran Canaria, Menorca, Palma, Santiago, Seville, Tenerife, Valencia, Jerez, Amsterdam, Paris CDG, Rome, London-Gatwick, Oporto, Florence, Milan, Lisbon

Bilbao Port is the largest harbour on the entire Cantabrian coast. Its ability to attract traffic is increasing by the year, and not only in terms of its main activity as a means of transport. The port and local institutions have worked to promote Bilbao as a stopover port in the competitive market of **cruise ships and sea passenger traffic**.

Bilbao Port finished 2019 with a 4% increase in goods traffic, pushing up volumes by 1.4 million tones. This is a record for the last 12 years, and faithfully reflects the positive performance of the port thanks to the continuation of traditional markets and new traffic routes to emerging destinations. 66% of its business is accounted for by imports, and 34% by exports, and the latter are still rising. Bilbao Port is still hard at work promoting the facility on the international front to bring in new flows of traffic, and arranged over 100 direct publicity events in 2017. The plan to maintain and enhance Bilbao Port's competitive edge is considering a gradual reduction in harbour fees. Another of the Port Authority's priorities is to drive up passenger traffic. **132 ferries and 59 cruise ships used the Bilbao Port facilities in Getxo** in 2019, including the new passenger terminal, boosting the harbour's competitiveness to offer added-value services for operators and passenger comfort. **200.631 passengers used Bilbao Port** in 2019. An increase in cruiser activity in Getxo Port also entails a major growth possibility for Bilbao Airport because both infrastructures are in close proximity - only 20 minutes by public transport or by car.





1.3. Industrial and Cultural Heritage

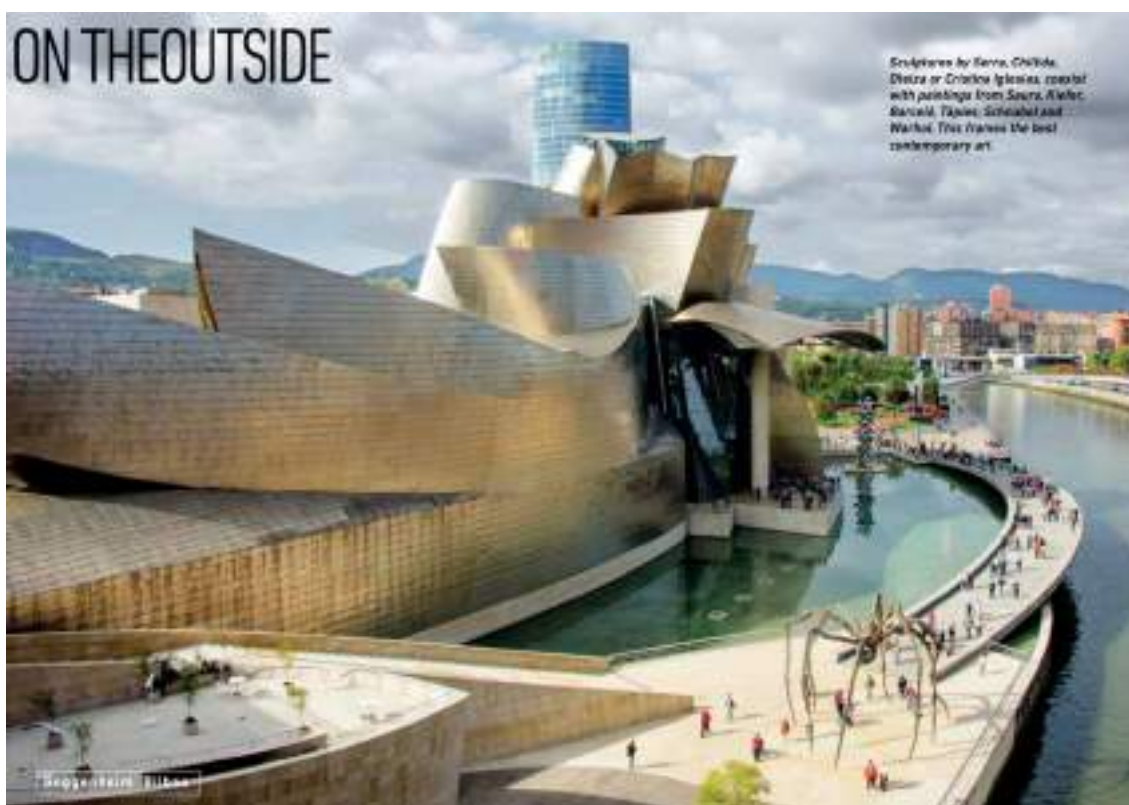
The Bilbao brand is a worldwide example of **urban regeneration**. It has now left behind a past linked to a declining steel industry to become an international symbol as a cosmopolitan designer city. A change made possible by the commitment of local institutions to a number of major emblematic projects, including mobility and transport infrastructure. Bilbao-Biscay is now a benchmark for other urban areas undergoing transformation, against a backdrop of increased tourism for leisure purposes and prosperous retail and business activity. Its international positioning is also linked to transparency in public administration, as reflected in reports by the international bodies that oversee the democratic health of institutions.

Bilbao is the gateway to the Bay of Biscay's scenery and a wealth of Basque culture.

A city with a turning point and projection reflected in the Guggenheim Museum Bilbao, which down through the years has succeeded in maintaining a culture and distinguishing features that make it unique and singular.

The Guggenheim Museum
Bilbao closed 2019 with a total of
1,170,669 visitors

Bilbao, the brand of an international city. The Bilbao brand has a huge capacity to draw in visitors. On the strength of the Guggenheim Museum's international image, as Best European City 2019, the capital of Biscay has turned culture into a major asset arousing the interest of thousands of travellers. Guggenheim Museum Bilbao is a world icon, one of the 20th century's major architectural creations, and continues to draw in thousands of visitors year after year. The "Guggenheim Bilbao" effect is the energy that has given the city international projection, making it the hub around which its regeneration revolves. Frank Gehry's masterpiece leaves nobody indifferent. Located in front of the museum, Jeff Koons' likeable Puppy has become the city's pet. And very nearby, the **Bilbao Fine Arts Museum** with more than 110 years, shows off its quality with a heritage ensemble of more than ten thousand pieces. Old, modern and contemporary art converge here, along with paintings from the Spanish and Flemish schools, and the largest collection by Basque artists.



Charming villages with an authentic seafaring atmosphere. Starting with Ondarroa, a port which lands some of the biggest catches of the Cantabrian region. Lekeitio stands out as an important tourist attraction as does Elantxobe for its dizzying drop down to the ocean. Mundaka, in the Biosphere Reserve of Urdaibai awaits, with its famous left handed wave. Nearby is Bermeo, the fishing village par excellence, with Cape Matxitxako and San Juan de Gaztelugatxe surprising all those who visit them. Armintza, Plentzia, Getxo, Santurtzi, Zierbena... will seduce you with their charms.



The river Nervión leaves Bizkaia near its mouth in the Cantabrian Sea, flowing under the gigantic suspension bridge known as Puente Colgante. Since it was built, hundreds of ships have gone through the towering 61m-high iron structure that spans across the river estuary from Portugalete to Getxo.

Visitors can cross the bridge riding a hanging gondola. About six million people cross it every year. Built in 1893, the Puente Colgante is the oldest transporter bridge in the world. Its wrought-iron lattice structure is a symbol of Bizkaia's mining industry. It resembles the Eiffel Tower, and this has made it increasingly popular. Being Bizkaia's most famous bridge, in 2006, the **Puente Colgante was named a Unesco World Heritage Site.**



The Gernika Meeting House, a cultural and historical centre with deep political significance for being the meeting place of the Councils of the Fiefdom of Bizkaia since the Middle Ages. The current neoclassical building is used as the seat of the Basque Parliament and as a church. It embodies the Meeting Room where the sessions of the Bizkaia General Assembly

are held. The magnificent stained-glass room, which houses the allegory of Bizkaia represented by the Tree and the Charters or “Lege zaharra” (the Old Law). The various districts that make up Bizkaia appear as their most symbolic buildings and main products: mining, industry, fisheries, agriculture... The history of the area, deeply affected by the bombing the city suffered in April 1937 during the Spanish Civil War, has been the basis for the resurgence of a strong people, with their own identity, as a model of peace and Basque rights and freedoms.



In Enkarterri, where the iron industry began hundreds of years ago, the mineral that was formerly mined from the Montes de Hierro has left an indelible imprint. The banks of the rivers were once filled with foundries that

transformed the metal extracted from the nearby mountains. Built at the start of the 16th century in Muskiz, [Ferrería de El Pobal](#) shows us how the Barbadún River has been powering the machinery to mould iron into nails, tools, agricultural implements, or weapons for quite a long time.



Another example of the importance of the mining industry in Enkarterri is the [Museo de la Minería del País Vasco](#). The museum houses an interesting and extensive collection of mining tools collected in the area and

exhibits them didactically. It is situated just on top of one of the huge craters that were made in Abanto-Zierben, at the Concha II mine, a few kilometres away from the mining town of La Arboleda. The funicular of La Reineta can take visitors there if they are keen on exploring the former open-cast mines, now transformed into small lakes. In Ortuella, the Apold-Fleisner furnace that was used to enrich the minerals and the mining neighbourhood of La Orconera are equally witnesses to the mining past of the area.



1.4. Protected areas and environmental heritage

The estuary of Urdaibai is a natural area formed by the river Oka. Its ecological variety has led to it being designated a Biosphere Reserve by UNESCO and it forms part of the Natura 2000 network. It is an important rest stop for the migrating birds that visitors can watch at the Urdaibai Bird Centre.

This diverse landscape is made up of the sea, the low mountains, the sand banks and marshes that appear at low tide, not forgetting the beautiful beaches such as Laga and Laida or the small coves like Antzoras, Lapatza or Aritzatxu. Visitors can climb up to San Pedro de Atxarre lookout and enjoy the view.

San Juan de Gaztelugatxe, an impressive islet off the coast of Bermeo and one of the most magical places in Bizkaia. San Juan de Gaztelugatxe is really a must for visitors coming to Bizkaia. A tiny yet



amazing cone-shaped islet, 35km east of Bilbao, in the coastal town of Bermeo, bearing a humble shrine dedicated to St John the Baptist at 150m above sea level. The name in Basque has two meanings: gaztelu-aitz, castle rock, or gaztelu-gatxe inaccessible castle. San Juan de Gaztelugatxe is unique, surrounded as it is by cliffs, islands and unspoilt beaches in the towns of Bakio and Bermeo, just next to the Urdaibai Biosphere Reserve.



This estuary, spanning 230 km² and 20 kilometres long, shows signs of having been inhabited since prehistory, as reflected in the spectacular [Santimamiñe Cave](#) and its rock paintings and evidenced by the necropolis at Forua. Also, within the reserve there is a [Basque Biodiversity Centre at Madariaga Tower in Busturia](#).

As well as the natural richness and unquestionable value of the "flysch", the Bizkaia coast offers other curious phenomena which demonstrate the area's environmental diversity. One of those are the Astondo Dunes, in Gorliz, a huge sand dune created by the action of the sea and the winds blowing in from the north. The variety of fossilised dunes, 6,000-year-old rocks made of petrified sand, have led to a revaluing of the importance of this area, [now designated a Site of Community Importance \(SCI\)](#). Hidden away and used in times gone by as a refuge and landing site for smugglers is the Smugglers Cove in Gorliz, accessible only by canoe.

Just off the coast of Bermeo is Izaro Island, a place with a cinematic past: a film production company was named after it and used its image. For a glimpse of a spectacular landscape, there's nothing like climbing up to the Atzarre Lookout in Ibarrangelu, where a magnificent panorama awaits of the Mundaka estuary and several hermitages. Strategically important due to its position above Abra cove is Punta Lucero, a summit overlooking the sea from the Nervión estuary. This was an important defence in the area and we can still see the remains of cannons, trenches, barracks... an integral part of what formed Bilbao's Iron Ring.

[Natural Park Gorbeia](#), where Bizkaia and Alava meet and share the nature reserve, is another essentially Basque location. At 1,482 m, the summit of Mount Gorbeia is the highest point in Bizkaia. The surrounding area combines gentle pastures, beech and oak

forests and rocky precipices peppered with caves. The Mairulegorreta Cave, all 12 km of it and the Itzina karst are the outstanding features. Both form part of the Itzina Protected Biotope. Gorbeia offers a completely different landscape from coastal areas. It is a great place to understand rural lifestyle and lives of shepherds. Also, visitors are able to see Latxa sheep – the sheep whose milk is used to make **Idiazabal cheese**, one of Bizkaia’s best-known foods. Visitors do not miss the climb to the top of Mount Gorbeia, crowned by a legendary cross. The so-called roof of Bizkaia offers a spectacular view of the surrounding mountains.

In **Natural Park Urkiola**, tradition and myth come together, amidst mountains, rocks and valleys of outstanding beauty. The goddess Mari and other characters of Basque mythology live in the park, which is also a site of religious pilgrimage. Urkiola is home to one of the most relevant buildings for Christian worship in Euskadi: the Shrine of San Antonio Abad and San Antonio de Padua, aka **Santuario de Urkiola**.

Armañón Nature Park, on the border with Cantabria, is not as well-known as the other nature parks in Bizkaia. On the surface, its rock massif is impressive, but it is under the ground that its true wealth is to be found: **200 caves, like Pozalagua**, open to be explored by curious visitors.





1.5. Biscay Tourism Products

1.5.1. Wine and Gastronomy Experiences

Gastronomy is one of the main reasons for visitors to enjoy Bizkaia. Basque cuisine is known the world over. Bizkaia offers enjoying traditional dishes, tasting modern meals rewarded with a Michelin star, latest trends in international cuisine, tasting wines, learning about the production of local produce (cheese, wine, etc.), learning how to make Basque delicacies in a cooking workshop. Numerous tourism business offer services exclusively about wine and gastronomy and many combine gastronomy with nature or cultural visits.

Michelin star restaurants

Basque chefs, are prophets in their own land and abroad, they manage the kitchens of top restaurants in Spain and all over the world. They win prize after prize and critical acclaim wherever they work. Selecting a favourite is a difficult task...all of them are outstanding in some facet of the art. That's why they have been awarded so many Michelin stars, the greatest distinction in international cuisine. Their establishments are not only great places to eat. They surprise visitors with their refinement, attention to detail and passion for the culinary arts.

Confining ourselves to Bizkaia we have Azurmendi run by Eneko Atxa and boasting three stars, and one-star Eneko. With one star also Andra Mari, run by Zuriñe García en Galdakao, Boroa in Amorebieta-Etxano with Jabier Gartzia in the kitchen and Asador Etxebarri in Atxondo, managed by Victor Arginzoniz. One-star restaurants in Bilbao include Zortziko run by Daniel García, Nerua, with Josean Alija in charge, Mina with

Álvaro Garrido and Lara Martín, Eneko Bilbao by Eneko Atxa, Atelier Etxanobe with Fernando Canales sharing the honours and Zárate, with Sergio Ortíz de Zárate.

Moreover, in Bizkaia, pintxos are a must. These bite-size culinary treasures are deeply rooted in Basque culinary traditions. One key experience is precisely a guided tour to enjoy different pintxos at different bars mingling with locals and learning where the local produce are coming from.

Local produce

The local produce fairs, both agricultural and for livestock, are common events in several towns in Bizkaia. They exhibit typical fruit and vegetables and animals cared for in the best conditions. Visitors can wander through the stalls and chat with the vendors who grow or raise them. This setting, rather than a commercial transaction, is more like a festival with all the tradition and popular culture. In Bilbao visitors can enjoy a visit to the Mercado Municipal (Municipal Market) of La Ribera, the largest covered market area in Europe according to the Guinness Book of Records. In front of the Old Quarter and always linked to the identity of La Villa, the site oozes history and tradition, and it is no coincidence that it is considered the "real market". Outside of the capital a trip to Gernika-Lumo to visit the famous market is well worth the trouble. But only on Mondays. In September or October, the market will be crowded with life. This season of fruitfulness makes for an even more colourful display of produce from the best crops of each farm and garden.

Slow food

The very name suggests a meal with no hurry that is all about the pleasure of savouring the flavour. It is only logical that this philosophy would have an impact here. There are numerous restaurants that practice this way to appreciate cuisine, with local, seasonal foods, enjoying every bite... Visitors can take note of these: in Bilbao: at Bascook, Baita Gaminiz, Mina, Aizian, at the Hotel Meliá Bilbao, Zárate, Yandiola, at Azkuna Zentroa (Alhóndiga Bilbao) and Adur, San Mames Restaurant, among others.

In the rest of Bizkaia: Gaminiz (Zamudio), Ibaia (Gordexola), Zallobarri (Gernika-Lumo), Jauregibarria (Amorebieta-Etxano) and Pablo Urzay (Getxo).

1.5.2. Nature Experiences

The Saint James Way

Bilbao Cathedral is dedicated to the town's patron saint, the apostle St James the Greater) with reference to the coastal variant of the Saint James Way. Reaffirming this, the "Puerta del Ángel" (Angel's door) or Pilgrims' door, greets the pilgrims travelling the

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Way with his shell. The culture of the Saint James Way in this area goes back even to the foundation of La Villa, as can be seen in the municipal charter.

In fact, the Coastal Route or Northern Saint James Way is one of the oldest pilgrimage routes. It crosses the maritime Basque Country that coexists with agriculture and the urban version that does the same with the rural environment. It extends from Markina-Xemein, inland, to the regions of Lea-Artibai and Busturialdea, on the coast, passing through Bilbao up to Las Encartaciones.

Trekking, North Walking

Trekking and North Walking along the Bizkaia coast will take visitors through beautiful landscapes on the edge of the sea, while they discover its history and the cultural and natural heritage of the region. There is an extensive network of sign-posted trails -long route (GR) and short route (PR)-. Visitors enjoy them and take the chance to taste the exquisite cuisine of the places they pass through. Along the coast, the Urdaibai enclave will take visitors through oak forests, the river Oka, the Mundaka Ría and the coast with beaches and cliffs. Visitors can also marvel at the agricultural production of the beautiful hamlets and small villages. The Itsaslur Vía Verde or walking trail connects the La Arena beach with Pobeña along an old railway line along spectacular cliffs.

BTT

The Mountain Bike Centre of Bizkaia extends through Busturialdea-Urdaibai and its surroundings, with eleven routes for cyclists of all levels, with exceptional routes for experts. The route through the Oma Valley, the route from Bermeo to Zugastieta and the track near the beautiful Mundaka Ría are particularly extraordinary

Boat trips, kayaks, canoes, paddle surf

Boat trips from different private companies on the Ría Nervión. The history of the city is incomprehensible without the Ría. and the former industrial artery has become the focus point of the new leisure options provided by contemporary Bilbao. A boat trip on its waters will show visitors the new town in all its glory. The ria can be also enjoyed with different companies that offer kayaking, canoes, paddle surf.

Surfing

Today a huge number of surfers come here from all over the world, but it was at the end of the 50s that surfing first appeared in Biarritz on the French side of the Basque coast. Surfers need beaches with the right waves and Bizkaia has them in abundance Mundaka is a good example, with waves that are 4 m high and 400 m long and considered among the best waves in the world. Bakio is another beach with outstanding waves. The Cantabrian Sea is a generous provider of waves, and some are considered

World Class, hence the number of surfing devotees filling the waters with their boards every year and making possible championships such as Sopela, part of the world circuit.

Bird watching

To visit Urdaibai is to discover a natural paradise where bird watching is a luxury within the reach of all visitors' binoculars. For in-depth knowledge of the area Urdaibai Bird Centre, in Gautegiz-Arteaga is recommended. The Research and Dissemination Centre studies birds and their habitats in detail to learn about the best ways to protect wildlife and nature in general. From the centre's observatory visitors can follow the routes of the more than 200 species that pass through Urdaibai every year.

Every autumn and winter the cove at Abra, in Getxo, becomes a refuge for migrating birds. From Santurtzi visitors can take a boat trip to watch the birds. There are specialized companies that explain the migration and species to visitors.

1.5.3. Cultural Experiences

In former times the banks of the River outside Bilbao diverged, and all the heavy industry of the zone was concentrated on the **left bank**, especially in **Barakaldo and Sestao**. The frenetic activity that seethed along the banks of the river in former times has given way to a completely renovated scenario that combines economic development with numerous amenities designed for the enjoyment of residents and visitors. Places like **Portugalete and Santurtzi** are proof of this renovation. The **right bank**, on the outskirts of Bilbao, has always been a residential district and so you will be able to admire the magnificent dwellings built by the emerging middle classes along the river. Places like **Las Arenas, Neguri or Algorta in Getxo**, are excellent examples of this trend.

Art matters in Bilbao and this fact is reflected in a series of world-class sites: **The Guggenheim Museum Bilbao**. The Bilbao collection shares its holdings with those of the Solomon R. Guggenheim Museum and the Peggy Guggenheim Collection. The lack of a permanent collection represents a new concept of museum, one which presents us with a changing panorama encompassing numerous visions of art in the 20th century. The chance to share this rich heritage that embraces movements from the first avantgarde movements to the present is a unique opportunity at a time when nobody dares to create a collection of modern masterpieces: Pablo Picasso, Paul Cézanne, Vasily Kandinsky and Paul Klee among others of similar standing.

The Fine Arts Museum (Museo de Bellas Artes): a century old institution with works by El Greco, Goya, Sorolla, Van Dyke, Cranach the Elder, Dürer, Gauguin and Picasso among others. This museum has one of the best collections in Spain with over 6,000 works of ancient, modern, contemporary, and Basque art.

The River of **Bilbao Maritime Museum**, located on the site of the Euskalduna shipyards, disseminates the history, culture and identity of the men and women who lived and worked in the surrounding area and of the river itself, closely linked to the ancient maritime tradition. The Athletic Club barge, on which the team paraded its trophies along the river, is now a museum piece. It has been restored and donated to the Maritime Museum where it is on display.

To explore the cultural identity of the Basque people there is nothing better than the **Basque Ethnological Museum**. It combines the intrinsic appeal of a building with a beautiful inner courtyard with a series of collections that take you through centuries of maritime and industrial history. The **Museum of Art Reproductions** is also of great interest. It displays the masterpieces of classical art that served as models for students at the Trade School.

You can also visit the **Vintage and Classic Car Museum at Galdames in the Torre Loizaga fortress**, a magnificent range of 75 luxurious classic cars including forty-five Rolls Royces in what is the biggest private collection of the marque in the world.

The **Peace Museum** is inspired by the bombing of Gernika-Lumo and focusses on two themes: History and Peace, through questions that aim to provoke a reflection on human rights and the Basque conflict such as reference points from which to observe the world situation.

Athletic Club Museoa in Red & White. 1400 square meters to show the history of a Club which is "more than a Club", the essence of our identity. Hundreds of objects, audiovisual productions and interactive systems to let you discover and know, whatever age you are, all the things that have filled the 100 years of history of the Athletic Club of Bilbao, and every corner, pitch, locker room...to feel like a real football player.

Enjoying the **Art district**, the visitor on its own or with the expertise of tourism guides that can further explain the value of the different pieces of art. Bilbao is a sanctuary of cultural pursuits. The initiative to make the city an indispensable stop on the international art circuit by harnessing its cultural and artistic appetite is apparent in the number sites and premises. Visitors can check out the cultural programmes of the galleries, shops, museums and art associations is wide and varied. Geographically, the golden mile runs from the Maritime Museum through the Albia Gardens, the Paseo Abandoibarra and Colón de Larreategui to Calle Ercilla. The Bilbao Art District, an initiative by the city's outstanding galleries, museums and agents to build upon the impetus provided by the advent of the Guggenheim Bilbao Museum. Art took over Bilbao at that moment and became the driving force behind the invasion of avant garde art that has placed Bilbao in the position it now occupies in international art circuits.

The biggest promotion of Basque culture takes place in “Durangoko Azoka”, or the “Durango Fair” where in December the new works of literature and music by Basque authors come together. Other highlights include the “Bizkaiko Dantzari Eguna” (Day of Basque Dance), the “Bizkaiko Trikitixa Eguna” (Day of Trikitixa), the “Bilbao Craft Fair”, the “Bizkaia Choir Day,” and the BreakOnStage, International Festival of Urban Culture.

1.5.4. Be Basque Experiences

Be Basque Experiences refer to activities that visitors can enjoy where many of their senses are activated, they require visitors to taste, smell, touch, etc. Across all the different counties/subregions of Bizkaia there are many experiences offered by tourism businesses and sometimes also by tourism offices or museums, these are just examples of Be Basque experiences:

Between grapes	Biotop of San Juan de Gastelugatxe
Shepherd for a day	From the wash to the cup
Enkarterriak	Miniature cuisine
Wool workshop	A journey through history
Live Basque rural sport. Wanna bet?	
Basque music workshop	
Medieval knight for a day	
Basque country active	
Pintxo workshop	
Roots of Euskadi	
Tree of Gernika and the Casa de Juntas (Meeting House)	
Caves of Santimamiñe	
Basque Pelota	
Athletic Club Experience	
Bilbao Tourism	
The present of the sea	
Seafaring Lekeitio	
Culture Basque Mythology	

Moreover, there are different events that connect with the Basque culture and folklore. The festivity of **Saint Thomas Aquino**, is one of the most important, and brings together thousands of people in Bilbao just before Christmas. The very best fruit, vegetables, cheese, turkeys, snails and “txakoli”. Visitors make sure to try “talo con chistorra” (chorizo in unleavened bread) On the 4th of February, Santa Agueda's eve, the streets of Bilbao and other Basque towns are filled with groups of revellers singing traditional songs while striking the ground with sticks. Two days before San Blas there is a traditional pilgrimage or romería. The custom is to buy doughnuts in the Arenal and cords that are taken to the church of San Nicolás to be blessed to protect the throat. The Fiesta de los Txikiteros is celebrated annually the 11th of October to pay tribute to the txikiteros and the patron saint of Bizkaia, the Virgin of Begoña.

The **Basque Fest**, a festival which, in its sixth edition, combines tradition and modernity along six lines Culture, Music, Market, Sport, Gourmet and Cinema -linked by the image of the “lauburu”, a quintessential symbol of the Basque culture.





1.6. Biscay Tourism Sustainability key figures

1.6.1. Demand side figures

In order to address the demand perspective, this chapter includes a selection of key figures: the evolution of Bizkaia's accommodation occupancy in 2021, taking as a reference (1.6.1.1) the EUSTAT survey of inbound tourism establishments -ETR-, (1.6.1.2) the analysis of passenger flow at Loiu airport and (3.3. and 3.4.) the main conclusions of the visitor surveys carried out by the BTIS in the current year 2021.

1.6.1.1. Occupancy in accommodation in Bizkaia

The following is an analysis of the data relating to arrivals, overnight stays, average stay, occupancy rate and markets of origin of tourists staying in Bizkaia during the year 2021.

Regarding the number of arrivals in the historical territory of Bizkaia, taking into account the three types of establishments determined by EUSTAT, the annual variation in the year 2021 with respect to 2020 has been positive, unlike last year 2020, a

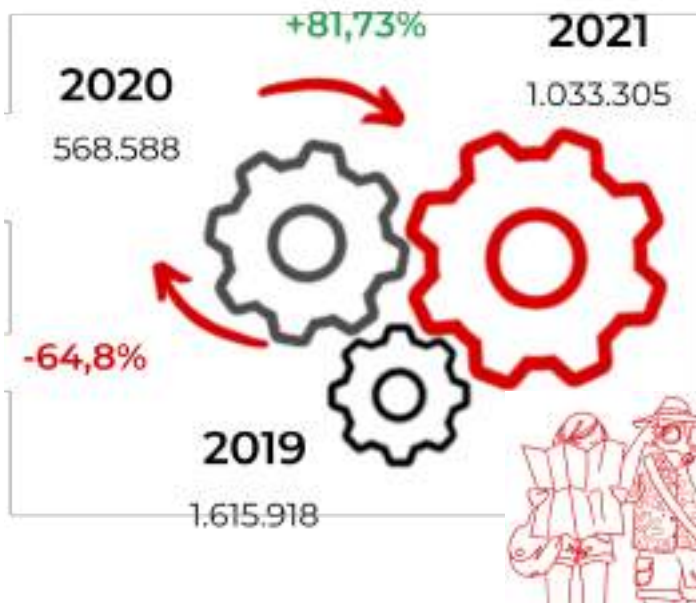


Figure 5 Evolution of total arrivals to Bizkaia. Source: Own elaboration based on data from EUSTAT, 2022

year in which there was a negative trend in the volume of tourist arrivals to Bizkaia. In 2021, a total of 1.033.305 arrivals were recorded, which represents an increase of 81,73% with respect to 2020.

Domestic Market

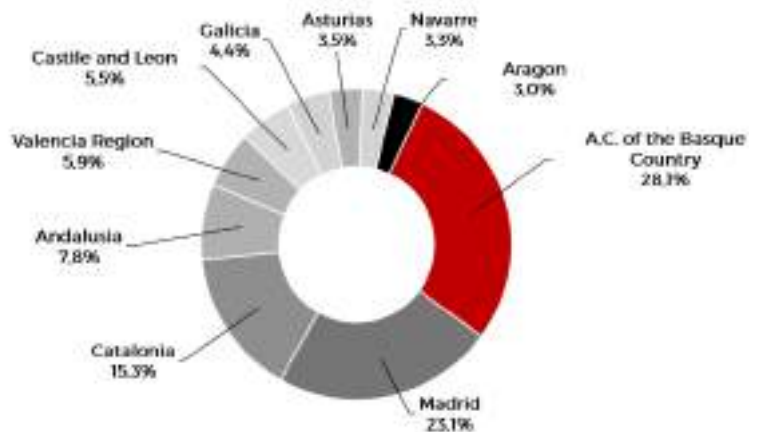


As the following table shows, a total of 764,559 state tourists (domestic tourists) entered the country in 2021, which represents an increase of 79.93% over the previous year in the domestic market.

Table 1 Origin of state tourist arrivals in Bizkaia in 2021. Source, EUSTAT, 2022

Origin	Arrivals 2021	Var % 2021 vs 2020
State total	764.559	79,93%
Andalucia	53.619	10,136%
Aragon	20.650	60,60%
Asturias	24.095	86,05%
Balearic Islands	9.920	47,75%
Canary Islands	11.448	112,43%
Cantabria	11.384	33,77%
Castile-La Mancha	17.176	110,10%
Castile and Leon	37.714	64,65%
Catalonia	105.177	82,72%
Ceuta and Melilla	249	54,14%
A.C. of the Basque Country	193.431	74,00%
Extremadura	8.228	110,49%
Galicia	30.545	69,23%
Madrid	158.487	85,60%
Murcia	8.854	176,34%
La Rioja	10.008	62,10%
Navarra	22.774	68,19%
Valencia Region	40.800	91,95%

The state market with a higher positive variation than the rest of the territories in this comparison is Murcia, with an increase of 176.34% in tourist arrivals. Murcia is followed by the Canary Islands market with an increase of 112.43% and the Extremadura market with an increase of 110.49%. Regarding the most affected markets, Ceuta and Melilla are the only state markets that have registered a negative variation in the comparison with 2020 with - 54.14%.



Within the domestic market, the following graph shows the

Graph 2 State tourist arrivals in Bizkaia in 2021. Source: EUSTAT, 2021

percentage weight of arrivals from the ten main national origins. During the year 2020, the largest number of arrivals corresponds to tourists from the Autonomous Community of the Basque Country itself, accounting for 29% of the total domestic demand, followed by tourists from Madrid (22%).

Inbound markets

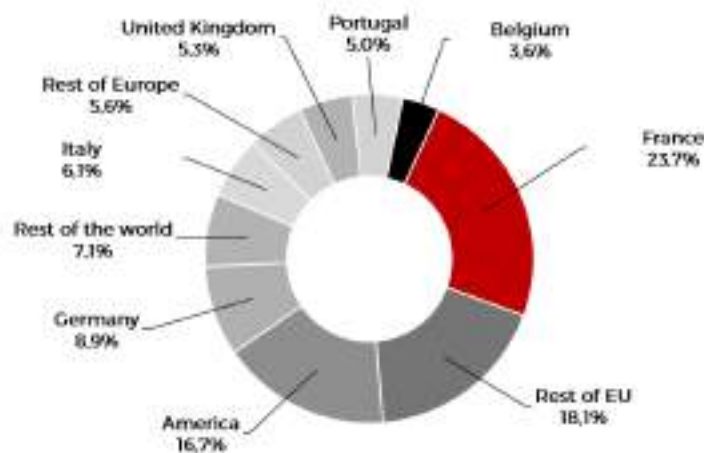


The number of tourists residing abroad has experienced a large increase in the year 2021, resulting in an annual variation of 87,07% more arrivals compared to 2020. The total number of inbound tourist arrivals in 2021 is 268,747 compared to 143,658 arrivals in 2020.

Table 2 Origin of foreign tourist arrivals in Bizkaia in 2021. Source: EUSTAT, 2022

Origin	Arrivals 2021	Var % 2021 vs 2020
TOTAL FOREIGN	268.747	87,07%
Germany	23.904	79,15%
Belgium	9.777	113,52%
France	63.599	67,35%
Italy	16.389	91,75%
Portugal	13.377	67,95%
Rest of EU	48.578	123,56%
United Kingdom	14.190	19,07%
Rest of Europe	14.995	104,77%
America	44.784	158,67%
Rest of the world	19.153	48,01%

Belgian and Italian tourists have been those who have registered the best variations in comparison with 2020 and the United Kingdom has been the market with a variation,

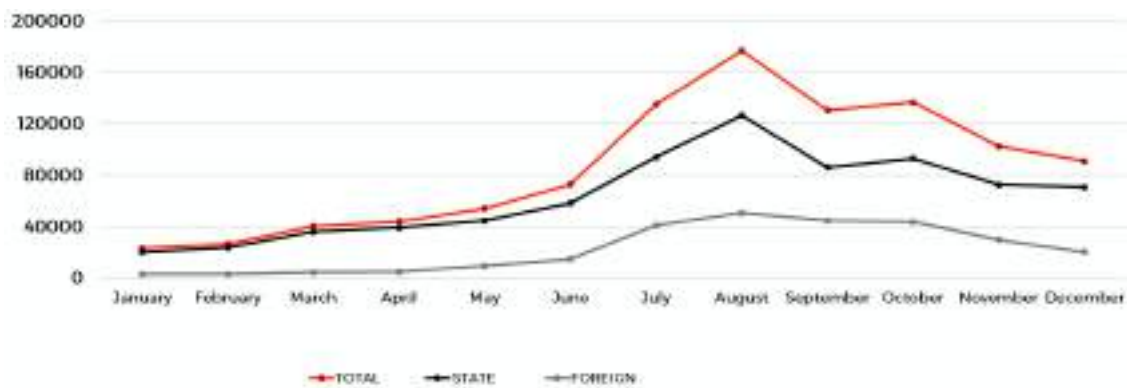


Graph 3 Foreign tourist arrivals in Bizkaia in 2021. Source: EUSTAT, 2022

although positive, lower than the rest of the foreign markets. In terms of volume of

arrivals, France and Germany are the markets that have registered the most arrivals in 2021. On the other hand, the market with the fewest arrivals among the top 10 European origins is the Belgian market with 9,777 arrivals.

Finally, with regard to the seasonality of demand by origin, according to the total number of arrivals of both domestic and inbound that have occurred throughout 2021, a low number of arrivals is identified in the first two months of the year. However, from March 2021 onwards, inflows start to increase until the highest peak of inflows is recorded in August 2021. There is another slight upturn in arrivals in October and a further drop in November and December, although still above the total number of arrivals recorded in June.



Graph 4 Seasonality of tourist arrivals in 2021 by origin in Bizkaia, Source: EUSTAT 2022

1.6.2. Passenger traffic

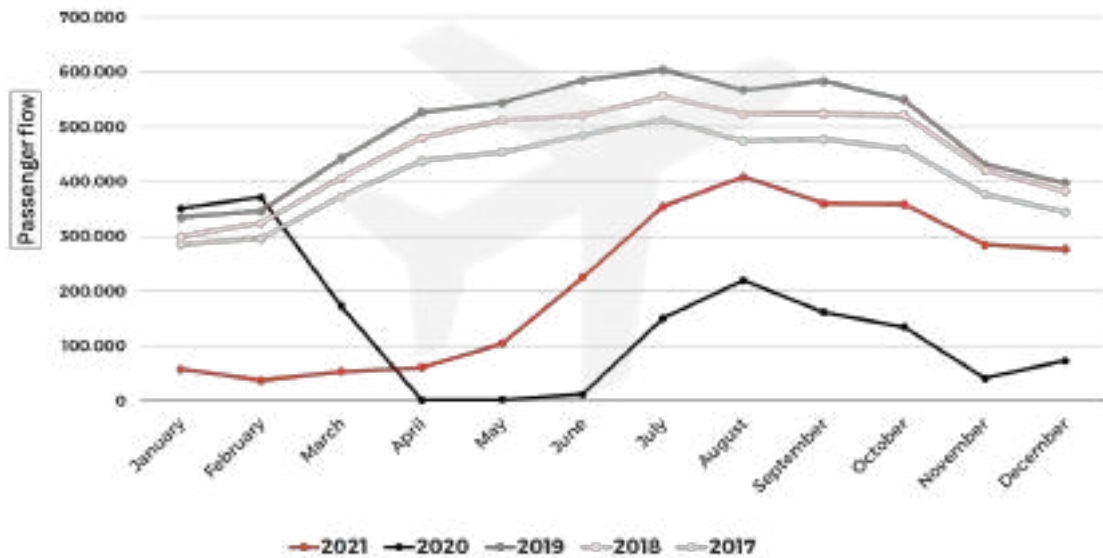
In 2021

2.580.911



passengers at Bilbao Airport

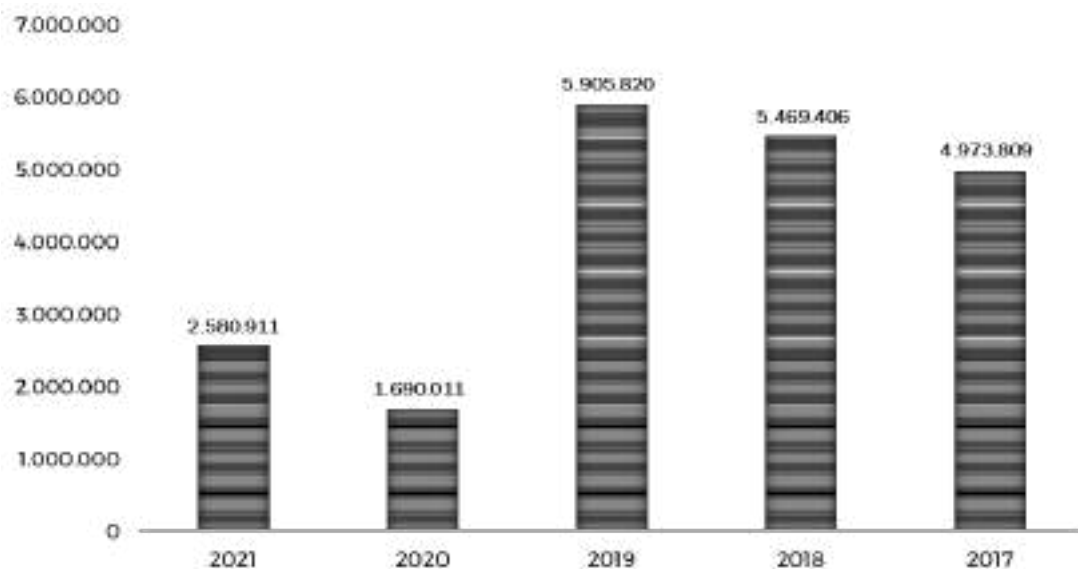
Continuing with the analysis of the tourism activities, the following graph shows the passenger traffic at Bilbao Airport based on the data published by AENA for the last 5 years.



Graph 5 Evolution of passenger traffic (2017-2021 of Loiu Airport). Source: AENA, 2022

The figures for the years prior to the COVID-19 pandemic reveal, on the one hand, the progressive increase in passenger traffic received by Bilbao airport over the years. This data also shows an increase in flows in the month of July, when the highest peak of passengers was recorded for the 3 years prior to COVID-19. This is due to the seasonal nature of demand, which is reflected in other indicators such as occupancy rates in accommodation, as analysed above.

On the other hand, the passenger data for 2020 clearly reflects the impact of the restrictions due to the appearance of COVID-19 from March 2020.



Graph 6 Total passenger traffic (2017-2021) at Loiu Airport. Source: AENA, 2022

For the year 2021, traffic is observed with relatively low figures in the months of January to April. Passenger numbers begin to increase significantly from May onwards, with the highest peak in August. From August onwards, inflows decline since there was another wave, but in no case return to the levels recorded at the beginning of 2021. These data shed light on the data recorded in 2020 and point to a clear recovery towards the figures of the pre-pandemic years.

In total figures, comparing 2021 with 2020, an increase of 52.72% has been recorded, as in 2020 the number of passengers reached 1,690,011 and in 2021 the total number of passengers at Bilbao airport has reached 2,580,911.

1.6.3. Supply side figures

According to data from the survey of tourism establishments (ETR) of the Basque Institute of Statistics (EUSTAT), in Bizkaia, in the year 2021 the total offer of accommodation, adding the three types of accommodation (hotel establishments, rural accommodation and tourism apartments), reached 744 establishments which offer an average of 15,508 bed places per day, which implies a total of 5,660,320 bed places offered per year.

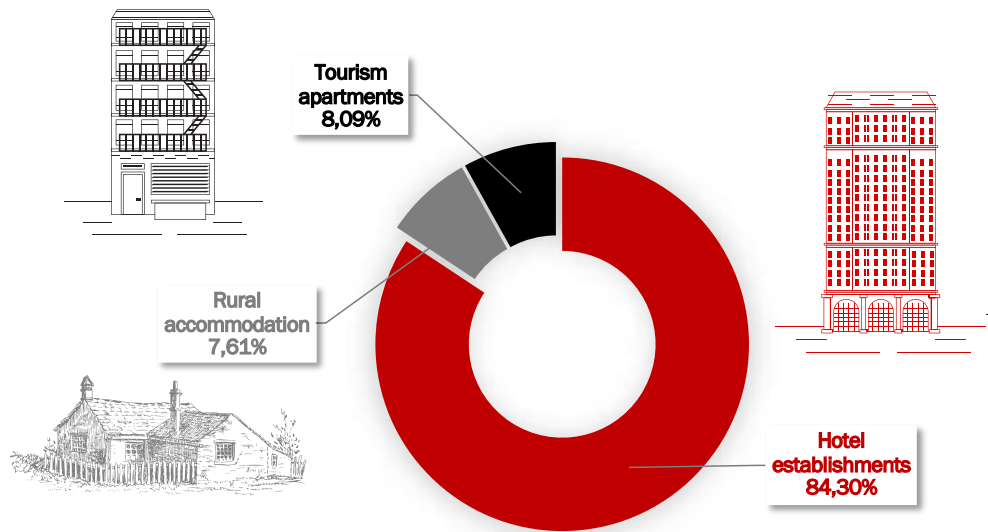


Out of the total accommodation in Bizkaia, 53.23% corresponds to tourism apartments, 31.05% to hotels and 15.73% to rural accommodation. The largest number of bed places offered belong to hotel accommodation, accounting for 84.30% of the total.

Table 3 Establishments, bed places and rooms in Bizkaia (hotel establishments and rural accommodation). Source: EUSTAT, 2022

2021	Hotel Establishments	Rural Accommodation	Tourism Apartments	TOTAL
Establishments	231	117	396	744
Offered bed places per day	13.074	1.180	1.254	15.508
2021 (weight%)	Hotel Establishments	Rural Accommodation	Tourism Apartments	TOTAL
Establishments	31,05%	15,73%	53,23%	100,00%
Offered bed places per day	84,30%	7,61%	8,09%	100,00%

The graph below shows the weight of bed places offered on average per day, according to the three types of accommodation distinguished by EUSTAT in Bizkaia.

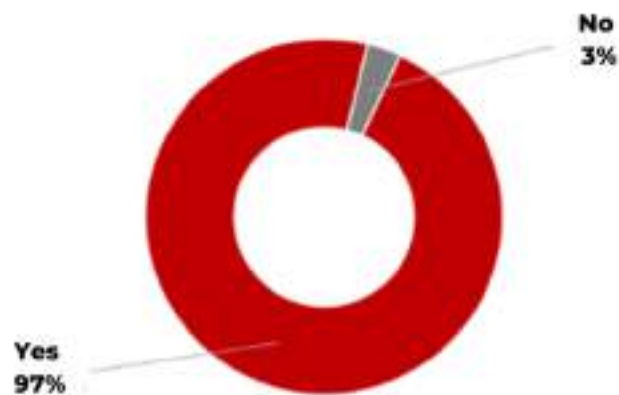


Graph 7 Supply of bed places in Bizkaia (hotel establishments, rural accommodation, and flats). Source: EUSTAT, 2022

From an economic perspective, apart from the figures seen on the supply side regarding employment, number of companies and establishments, the Basque Country conducts a TSA for the autonomous community and for each province. Hence, tourism in Bizkaia in 2020 contributed with 1.230.443 thousands of euros, representing a 3,4% of Bizkaia's GDP. This is a decrease from 2019 where it meant 5,6% and 2.263.742 thousands of euros (EUSTAT, 2021).

1.6.4. Residents' views on tourism

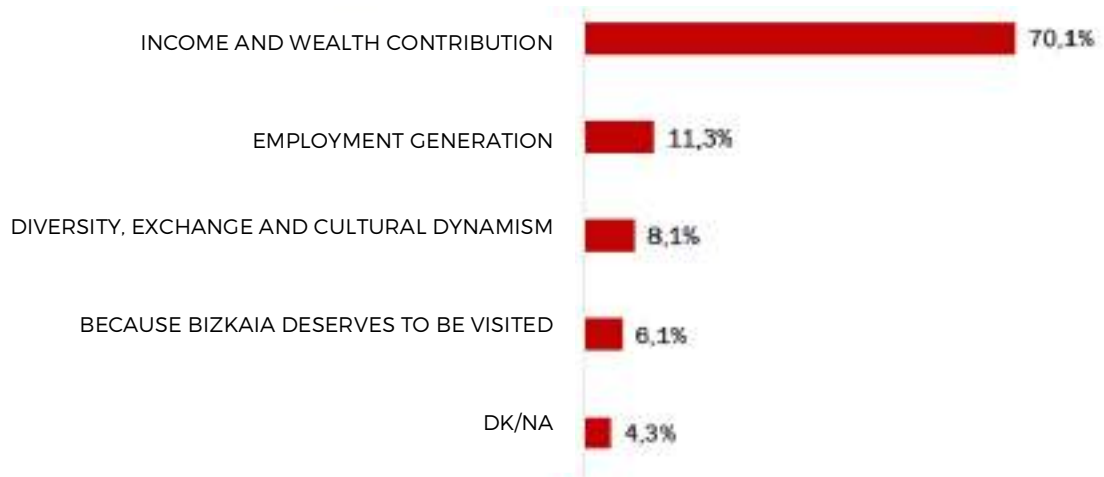
From a social perspective, BTIS every year conducts surveys to Bizkaia residents. A key result of the 812 questionnaires carried out among the citizens of Bizkaia in 2021 (margin of error $\pm 3.51\%$ (for a confidence level of 95.5% with $p=q=0.5$)) is the maintenance of their opinion over the last few years. The results analysed



Graph 8 Consideration of tourism as beneficial for Bizkaia. Source DFB 2021

below correspond to the survey of residents of Bizkaia carried out between 1 July and 30 December 2021.

Thus, the citizens of Bizkaia are very clear about tourism being beneficial for the territory, as it generates wealth and employment, which is reflected in the areas closest to where they live, which also provides a very positive image of Bizkaia and its capabilities in a competitive environment, hence tourism is considered/perceived as a promotional element.



Graph 9. Positive aspects associated with tourism for residents. Source: DFB, 2021

Regarding the residents' assessment of the direct/indirect economic impacts of tourism, the most highly rated option, with an average of 8.37, is that tourism should be taken care of because it is an opportunity for Bizkaia's economy. Next, with 8.16, it is considered that tourism creates job opportunities in Biscay and that tourism increases business opportunities for people and companies in Biscay (8.13). On the other hand, the least valued factors, with 5.99, are that the tourism sector especially generates jobs for women and that tourism is associated with the saturation of certain community services, such as the police, public safety or waste collection (6.63).

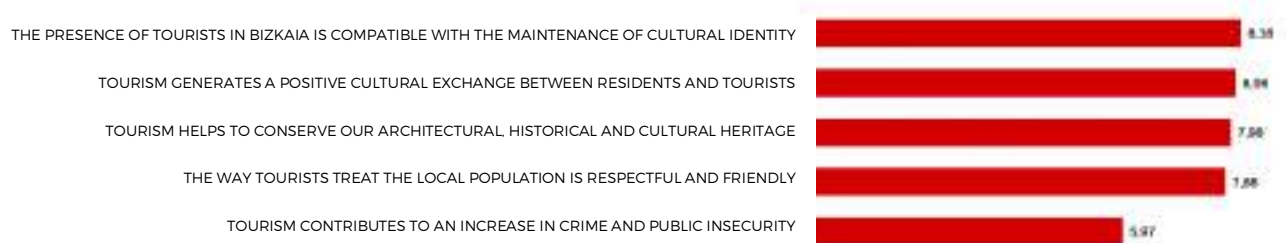




Graph 10. Economic impact of tourism - Annual 2021 (scale 1 to 10). Source: DFB, 2021

Regarding the socio-cultural impact of tourism for the residents of Bizkaia, the most highly rated aspect (8.16) is that linked to the maintenance of cultural identity. Along the same lines, the positive cultural exchange between residents and tourists stands out (8.06).

Graph 11. Socio-cultural impact of tourism - Annual 2021 (scale 1 to 10). Source: DFB,2021



Regarding the environmental impact of tourism seems to be a concern for residents, mainly in terms of the saturation of certain natural areas (7.54). Noise from tourist establishments (5.61) and traffic (6.30) are the issues with the least impact according to the rating scale.



Graph 12. Environmental impact of tourism - Annual 2021 (scale 1 to 10). Source: DFB, 2021

In relation to the assessment of the residents of Bizkaia regarding the management of tourism by the Provincial Council of Bizkaia, almost 69.7% of people living in Bizkaia consider that the management of tourism by the Provincial Council of Bizkaia has been positive or very positive. Positive evaluations are linked to promotional actions (22.4%) followed by good management (21.8%). On the other hand, negative evaluations indicate that 32.5% of residents agree that there is little promotion of the tourism destination, and that 26.5% correspond to a non-sustainable tourism model.

Following the same line, in relation to the assessment of the residents of Bizkaia regarding the management of tourism by the Provincial Council of Bizkaia, the most highly rated action corresponds to the promotion of Bizkaia in the rest of Spain (7.53), followed by the preservation of heritage and the natural environment (7.49). Support for tourism companies to improve their services, undertake and professionalize their activity is the lowest rated activity with a score of 7.05.

Table 4 Key indicators on residents' attitudes towards tourism. Source: BTIS, 2021..

	Key indicators on the residents' attitudes towards tourism in Bizkaia							
	Tourism beneficial for Biscay (% yes)	Tourism positive for the image of Biscay (% yes)	Importance of tourism in the local economy (% yes)	Perception of tourist overcrowding (average)	Tourism as a generator of employment (average)	Quality of tourism (average)	Coexistence with tourism (average)	Environmental degradation (average)
2021	97,0%	96,7%	95,8%	6,17	7,54	7,67	7,88	6,90
2020	96,5%	96,3%	93,9%	6,00	8,06	7,98	7,72	6,38
2019	97,2%	97,1%	94,1%	6,32	7,93	7,95	7,80	6,37
Dif. 20-21	0,5%	0,4%	1,9%	0,17	-0,52	-0,31	0,16	0,52

And although the survey process carried out shows that the citizens of Biscay do not have a sufficiently well-formed opinion on the details and/or specific actions, they do

have a clear general criterion regarding the tourism strategy to be implemented, namely: "to make the promotion and boosting of tourism in Biscay compatible while maintaining the current sustainable, quality, sensible management model".

Thus, the citizens of Bizkaia will be very attentive and will respond actively if the criteria for promoting tourism in the Territory deviate from the current "sensible" management model, which makes the most of the existing cultural and natural resources. Hence the request not to fall into actions that could lead to overcrowding, saturation, ... a model that is not Bizkaia's own.

1.6.5. Environmental dimension

The **environmental impact** assessment of tourism in Bizkaia makes it possible to understand, prevent and minimise its impacts. For the environmental figures in the destination, according to INSTO's mandatory issue areas: energy consumption, climate action, water management, wastewater management and solid waste, general data for Bizkaia will be presented below.

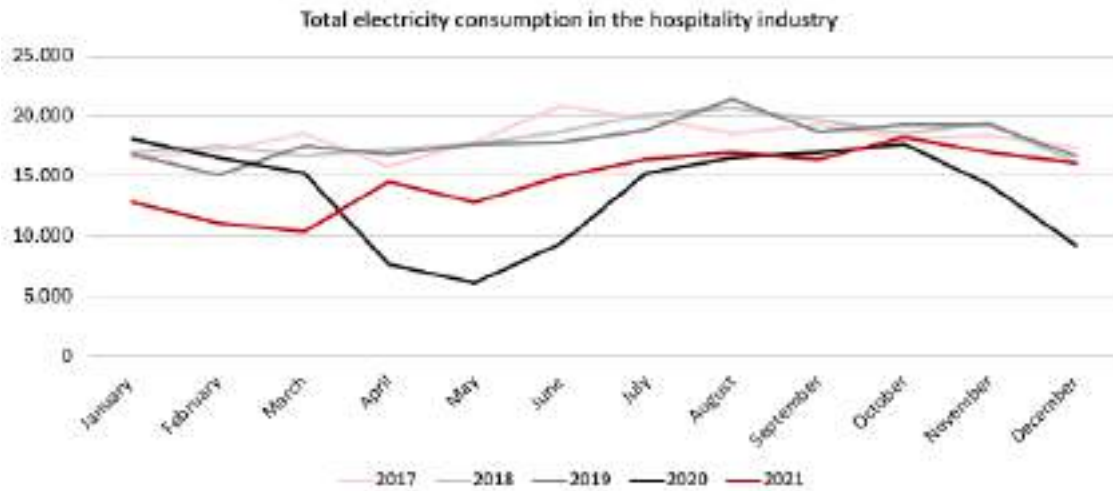
- Energy Consumption

Regarding electricity consumption, the data provided by the Basque Energy Agency is broken down by the Hotel and Catering and Commerce and Services industries. The following graph shows the total electricity consumption of both breakdowns. The data shows the lowest consumption in the months of May and September. It can also be seen that in 2020 electricity consumption decreases from March onwards, as a result of the closure of many establishments and shops due to the COVID-19 pandemic. In 2021 it levels off again, returning to levels similar to the ones registered in 2019. The highest peaks in the last 5 years occur in the months of February, April, June and November. In sum, there is no evidence that electricity consumption is decreasing over the years.



Graph 13. Total electricity consumption in Hotels and Restaurants and Commerce and Services. Source: EVE,2022

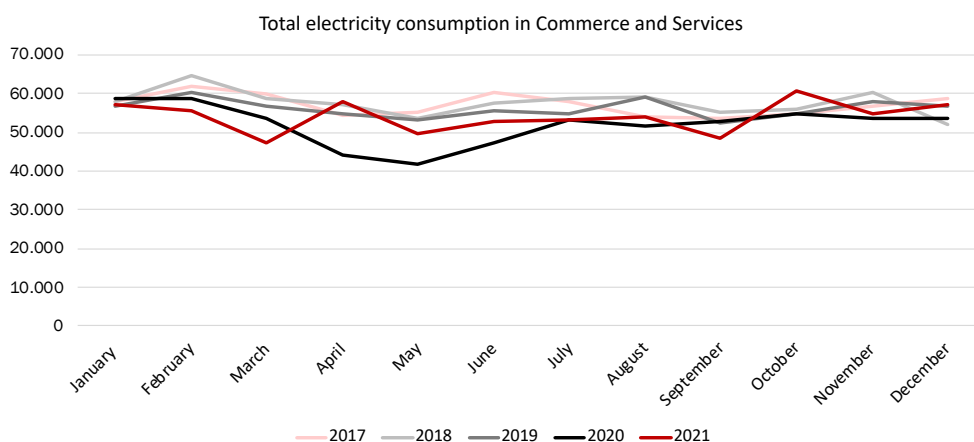
In line with the previous graph, the following graph presents electricity consumption in the hotel and catering industry:



Graph 14. Consumo eléctrico total en Hostelería en Bizkaia por periodo. Source: EVE,2022

The data shows higher variations over the years 2020 and 2021. The closure of establishments in 2020 due to COVID-19 is reflected to a greater extent. In 2021, there is a mainly upward trend towards almost reaching and, in several months such as January, April, October and December, surpassing the electricity consumption figures for hotels and restaurants in 2019.

Regarding the electricity consumption data in Commerce and Services, the peaks and trends follow the same line as the data relating to electricity consumption in hotels and catering. It should be noted that there is a greater recovery in commerce and services than in hospitality, as it shows signs of stability compared to 2019, 2018 and 2017 as of April 2021. However, there is no evidence that electricity consumption is decreasing over the years.



Graph 15. Total electricity consumption in Commerce and Services in Bizkaia by period. Source: EVE,2022

In relation to climate change, it is considered important to measure the number of companies that are making efforts to contribute to mitigating the effects of climate change. To this end, data provided by the Basque Tourism Agency (Basquetour) specifies the number of companies that are committed to the ethical code of the territory, with SICTED & SICTED Safe Destination, Smart Business, Eco Label and Energy Efficiency:

Bizkaia	
Ethical Code (2020-2021)	207
SICTED Safe Destinations (2021)	151
Sicted (2019)	229
Smart Business (2019)	56
Eco Label (2015-2019)	15
Energy Efficiency (2018-2019)	23

Table 5. Number of tourism companies committed to climate change in Bizkaia. Source: Basquetour, 2022

- Water Management

Another key environmental sustainability indicator is water consumption. The table below shows the total water consumption data for the Basque Country as a whole, as this data is not available for each historical territory, and the consumption in the Hotel and Catering Industry. Water consumption is given per m³ and as a percentage of the rest of the industries.

Units: m ³ and %.												
	2013		2016		2017		2018		2019		2020	
	m ³	%	m ³	%	m ³	%	m ³	%	m ³	%	m ³	%
Total consumption for other uses (own sources)	1.212.924	100%	1.522.944	100%	1.631.735	100%	1.707.480	100%	1.720.928	100%	1.638.772	100%
5.- Hospitality industry (I)	11.992	1,0%	12.072	0,8%	13.142	0,8%	14.746	0,9%	15.404	0,9%	10.092	0,6%

Table 6. Water consumption in hospitality. Source: EUSTAT,2021

The data indicates a total consumption of 10,092 m³ in 2020, the lowest figure recorded since 2013. It should also be noted that the percentage represented by consumption in the hotel and catering industry as a percentage of total consumption is also the lowest since 2013, falling by 0.3 percentage points to 6% of the total. The following graph shows how the weights of water consumption are distributed in the rest of the industries.

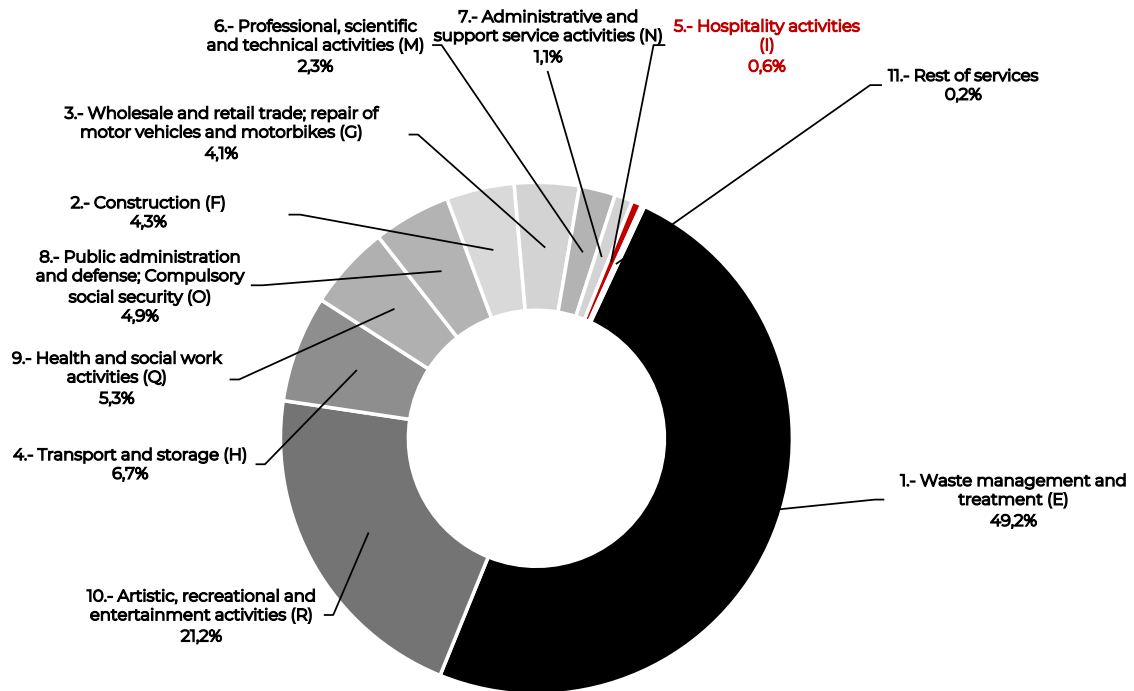


Table 7. Water consumption distribution across the different industries in the Basque Country. Source: EUSTAT, 2022

In relation to water quality in Bizkaia, the Bilbao Bizkaia Water Consortium manages this indicator in several municipalities in Bizkaia. The following functions are carried out by the consortium:

- Control and monitoring of water quality at source: reservoirs, rivers and springs.
- Control, monitoring and supervision of the treatment processes in the different treatment stations.
- Control and monitoring of the quality of water for human consumption: treatment stations, reservoirs, distribution networks and the consumer's tap, in compliance with Royal Decree 140/2003, which establishes the health criteria for the quality of water for human consumption.

Source: Bilbao Bizkaia Water Consortium, 2020

It should be noted that the analysis carried out by the laboratory does not determine the drinkability of the water, but rather its hardness. The hardness of the water depends on the nature of the soil from which it comes and the drinking water treatment processes do not alter its natural hardness (Consortio de Aguas de Bilbao Bizkaia, 2020).

The following map shows the levels of water hardness by municipality in the data collected by the laboratory. It should be noted that the municipalities evaluated are

the municipalities that fall within the territorial activity of the Bilbao Bizkaia Water Consortium, which are not all of the municipalities in Bizkaia.

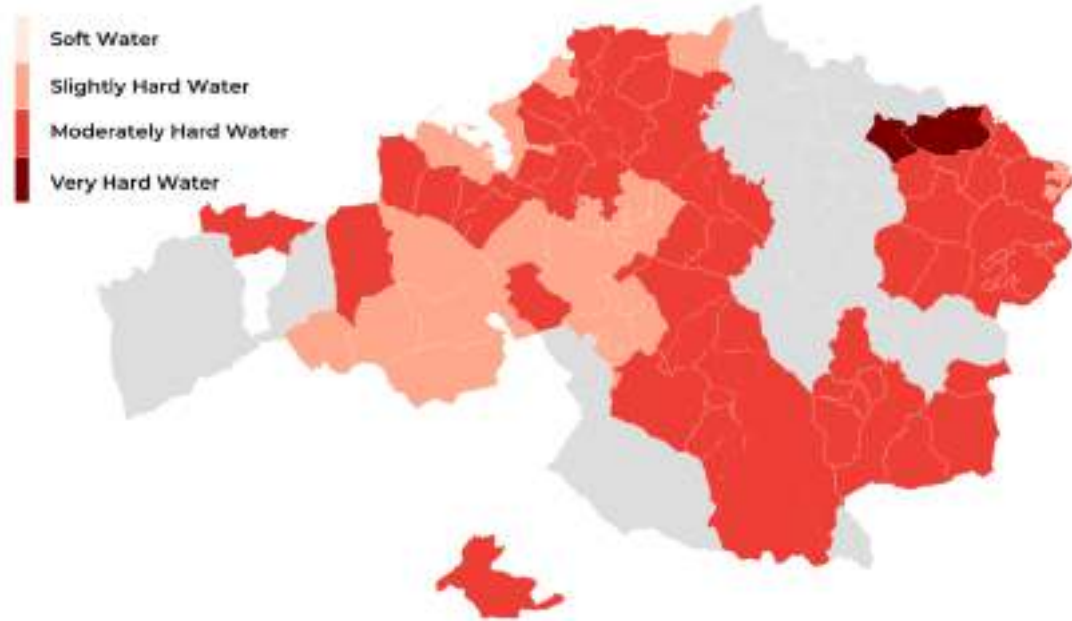


Figure 6 Water hardness in the municipalities of Bizkaia. Source: Bilbao Bizkaia Water Consortium, 2020

The map shows that more than half of the municipalities have moderately hard water. There are no municipalities with soft water levels and only two municipalities present very hard water.

The Provincial Council also analyses the water quality of all the beaches in Bizkaia. This data is available to the public on the Provincial Council's website and is updated periodically.

Beach	Municipality	Hygienic-sanitary conditions of the beach (**)	Bathing water sanitary qualification
Bakio	BAKIO	Good	Excelent
Muriola	BARRIKA	Good	Excelent
Aritzatxu	BERMEO	Good	Excelent
San Antonio	BUSTURIA	Good	Sufficient
Ea	EA	Good	Good
Arrigunaga	GETXO	Good	Excelent
Barinatxe	GETXO	Good	Excelent
Ereaga	GETXO	Good	Excelent
Gorrondatxe	GETXO	Good	Excelent
Las Arenas	GETXO	Good	Good
Gorliz	GORLIZ	Good	Excelent
Laga	IBARRANGELU	Good	Excelent
Laida	IBARRANGELU	Good	Excelent
Ogella	ISPASTER	Good	Excelent
Isuntza	LEKEITIO	Good	Excelent
Armintza	LEMOIZ	Good	Excelent
Karraspio	MENDEXA	Good	Good
Karraspio	MENDEXA	Good	Excelent
Laidatxu	MUNDAKA	Good	Good
La Arena	MUSKIZ	Good	Excelent
Arrigorri	ONDARROA	Good	Excelent
Plentzia	PLENTZIA	Good	Excelent
Arriatera - A	SOPELANA	Good	Excelent
Barinatxe	SOPELANA	Good	Excelent
La Arena	ZIERBENA	Good	Excelent

Table 8. Water quality of the beaches in Bizkaia. Source: Biscay Provincial Council, 2022

Almost all the beaches in Bizkaia have an excellent bathing water health rating, except for the beaches of Ea, Karraspio, Laidatxu and Las Arenas, which have a good rating, and the beach of San Antonio, which has a sufficient rating. It should be noted that all the beaches have good hygiene and sanitary conditions.

- WasteWater Management

The Basque Statistics Institute, EUSTAT, provides data on the proportion of municipal wastewater dumped in relation to the total municipal wastewater generated and treated:

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Trend
Euskadi	53,89	51,07	50,66	45,17	41,15	35,63	37,28	36,37	35,70	:	<<<
Araba / Álava	:	:	:	72,13	69,55	65,08	61,85	64,46	64,01	:	>>>
Bizkaia	:	:	:	30,40	27,60	21,93	26,35	23,30	24,53	:	<<<
Gipuzkoa	:	:	:	58,78	50,69	44,79	44,69	45,87	41,44	:	>>>

<<< moves away from the target

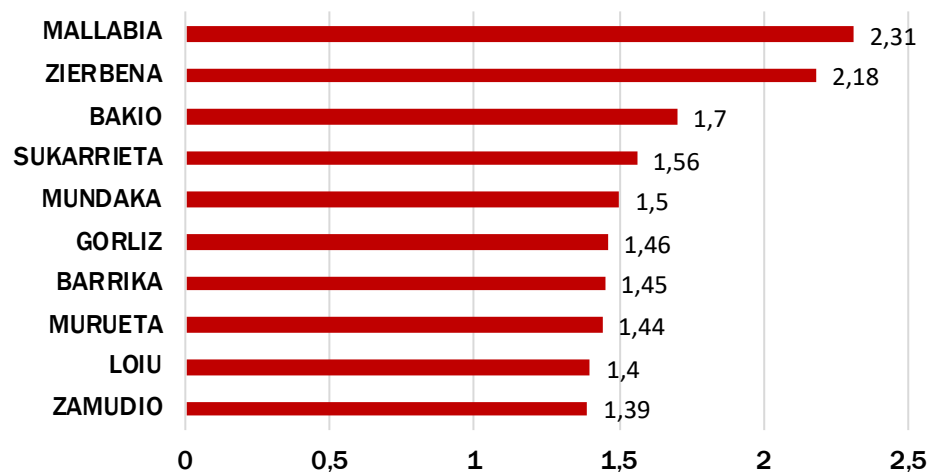
>>> approaches the target

Table 9. Proportion of municipal waste landfilled in relation to total municipal waste generated and treated. Source: EUSTAT, 2021

As can be seen in the table, in Bizkaia, this proportion in 2018 is of 24.53%, which is far from the rest of the historical territories that have a higher proportion, 64.01% for Araba and 41.44% for Gipuzkoa. However, Bizkaia is the only Basque province that registers a trend that is far from the territory's own objective.

- Solid Waste Management

To conclude the analysis of general environmental indicators in Bizkaia, the data on waste generation per inhabitant and per municipality are presented for the 10 municipalities in Bizkaia with the highest rate of waste per inhabitant in 2020.



Graph 16. Kg of waste per inhabitant, municipality and per day. Source: DFB, 2021

In addition to the municipalities shown in the graph above, the municipalities that record a lower volume of kilos per resident per day than the rest of the municipalities in Bizkaia are Errigoiti, Durango and Sestao, with around 0.85Kg of waste per inhabitant per day.

Finally, it is also essential to know how much waste is recycled in Bizkaia. As the table below shows, Bizkaia is the TTHH with the highest recycling rate, since, according to

the Basque Institute of Statistics, 71.32% of hazardous waste is recycled, which is above the average for the Basque Country, which stands at 64.70%.

Furthermore, unlike the indicator analysed above regarding dumped waste, the percentage of hazardous waste recycled in Bizkaia is the only one that comes close to the targets set by the territory.

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Trend
Euskadi	60,13	66,68	61,55	68,70	66,62	67,71	66,10	64,42	64,70	:	<<<
Araba / Álava	34,53	51,30	50,23	43,63	54,86	60,07	54,78	54,72	50,57	:	<<<
Bizkaia	60,87	69,86	63,40	75,69	71,04	71,16	70,77	69,36	71,32	:	>>>
Gipuzkoa	76,91	68,90	63,80	64,59	61,63	62,69	60,33	56,60	58,87	:	<<<

<<< moves away from the target
>>> approaches the target

Graph 17. Proportion of hazardous waste recycled by TTHH and period. Source: EUSTAT, 2021

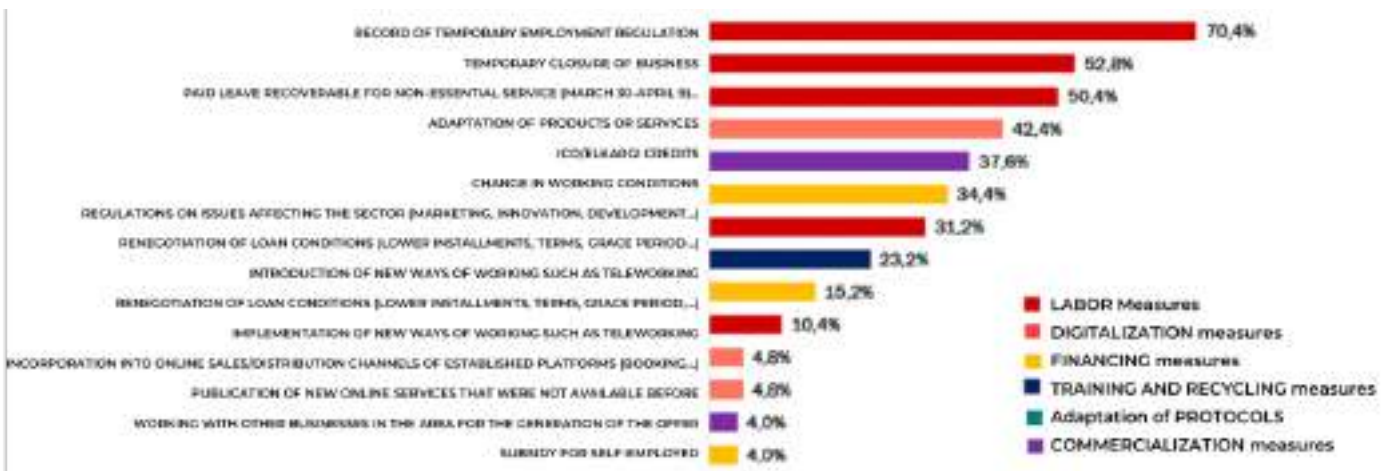
1.6.6. COVID-19 impacts

1.6.6.1. Impact on Tourism Businesses and measures taken

Within Bizkaia tourism industries, it is worth emphasizing the impact generated by the pandemic in 2021, as well as the measures implemented by companies to deal with it.

In order to cope with the pandemic in Bizkaia, labour-related measures (94.4%), those related to financing (53.2%), and digitalisation (50.0%) are the three main measures adopted by companies in the tourism sector.

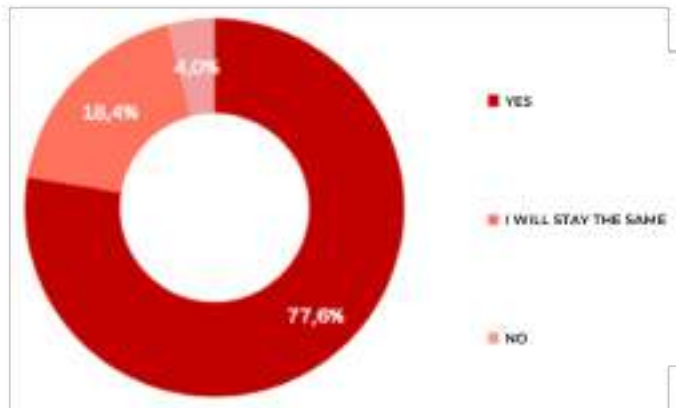
In the same way, labour-related measures in response to the impact of COVID-19 are the most noteworthy, "ERTEs" [temporary employment regulation files] (70.4%); "temporary



Graph 18 More adopted measures to keep the business running in 2021. Source: BTIS, 2021.

closure of the business" (52.8%) and "paid leave recoverable for non-essential service" (50.4%).

The growth forecast for the next 3 years (2022-2024) is a very important indicator and becomes more relevant with the pandemic, and for this year it is an indicator of the vitality of the sector, of revitalization or resurgence after the impact of COVID-19, as



Graph 19 Growth forecast for the next 3 years . Source: BTIS., 2021

almost 8 out of 10 companies in the tourism sector in Bizkaia (77.6%) plan to grow in the next 3 years. Of the companies that do not foresee growth in the next 3 years (2022-2024), 1 out of every 2 cases (50.8%) are in the process of transferring their business, 25.5% are currently in the process of reflection, 11.8% are in definitive closures and 9.7% are in temporary closures.

In this growth path, the forecast already shows the growth in turnover of companies in the tourism sector in Bizkaia. And this is not only in the 68.0% of companies that are going to increase their turnover by an average of 19.4% in the current year 2021 compared to 2020; but also, in the 85.6% that forecast an increase of 21.3% in their turnover in the coming year 2022 compared to the current year 2021.



Graph 20 Forecasting the growth in turnover 2020-2021-2022. Source: BTS, 2021

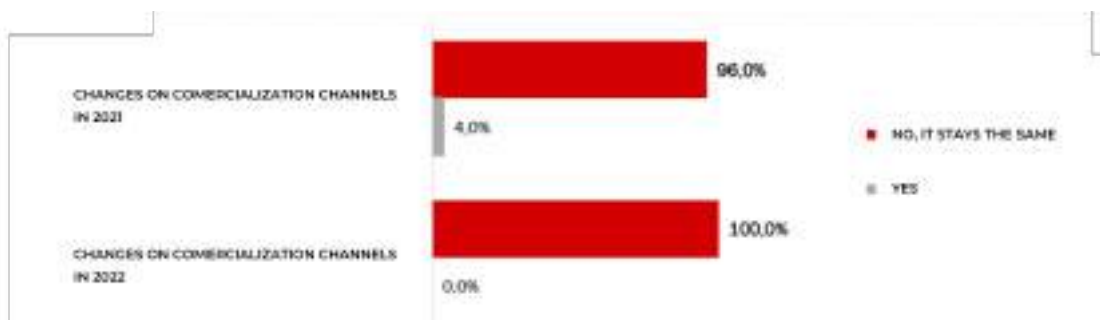
However, the forecast growth in turnover is transferred to a lesser extent, or in a more nuanced way, to the forecast growth in the workforce of companies in the tourism sector in Bizkaia.

Thus, in 2021 there is a sort of "draw" with respect to 2020, although a slight increase in the workforce is forecast for 2022 with respect to 2021.



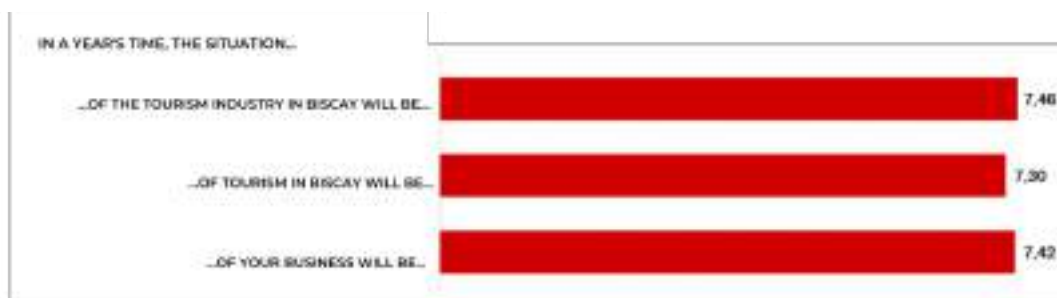
Graph 21 Forecast growth in the workforce base 2020-2021-2022. Source: BTIS, 2021

Similarly, there is no change in the "marketing channels" either in the current year 2021 compared to 2020 or in the coming year 2022.



Graph 22 Significant changes on commercialization channels 2020-2021-2022. Source: BTIS, 2021

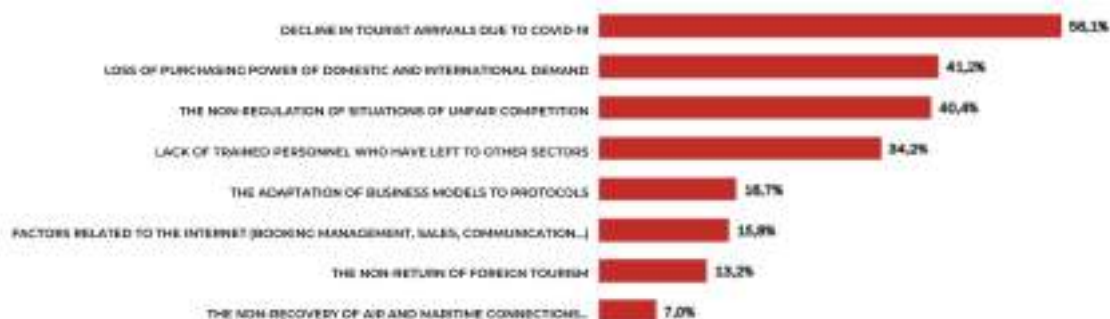
When reflecting on what will happen in one year's time, Bizkaia tourism companies are optimistic on all three levels: tourism in general, the sector and their own company, taking into account a scale of 1 to 10 (1 being "much worse" and 10 being "much better").



Graph 23 One year forecast for the tourism sector. Source: BTIS, 2021

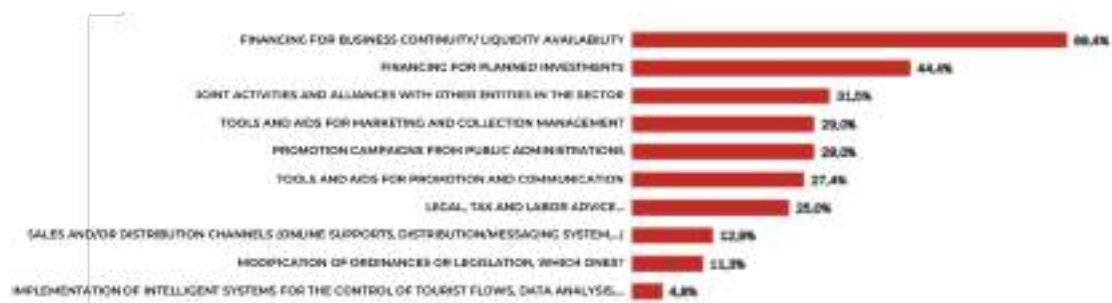
74.0% of the companies claim to encounter obstacles to their growth, with "lack of aid/subsidies to the sector" (62.5%) being the greatest obstacle, followed by "lack of economic resources" (43.8%), also of an economic nature.

In line with the main changes in demand, "the decrease in the flow of tourists due to COVID-19" (56.1%) continues to be the main change foreseen in demand in the sector by Bizkaia's own agents. Similarly, there is concern about the situation of economic uncertainty, which may be reflected in a lower orientation towards tourist spending.



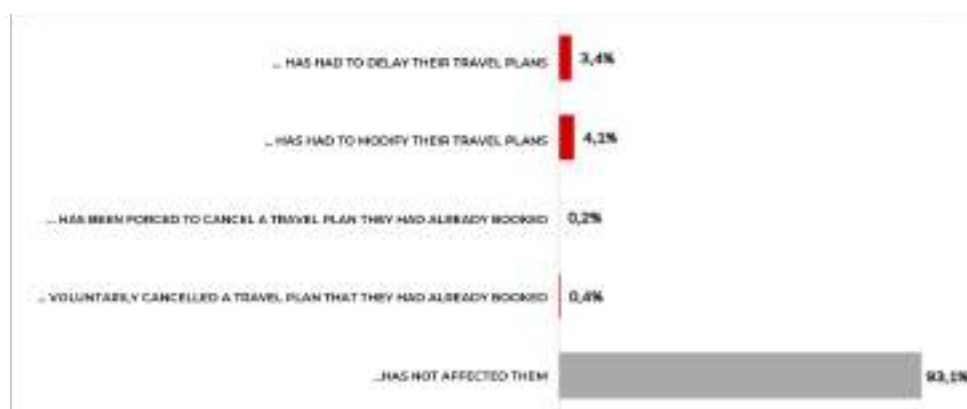
Graph 24 Forecast of the main demand changes that will affect their activities. Source: BTIS, 2021

Similarly, among the main needs of the tourism industry in Bizkaia are those actions related to "financing to continue the activity/ having liquidity" (69.4%).



Graph 25 Main needs of the tourism industries. Source: BTIS, 2021

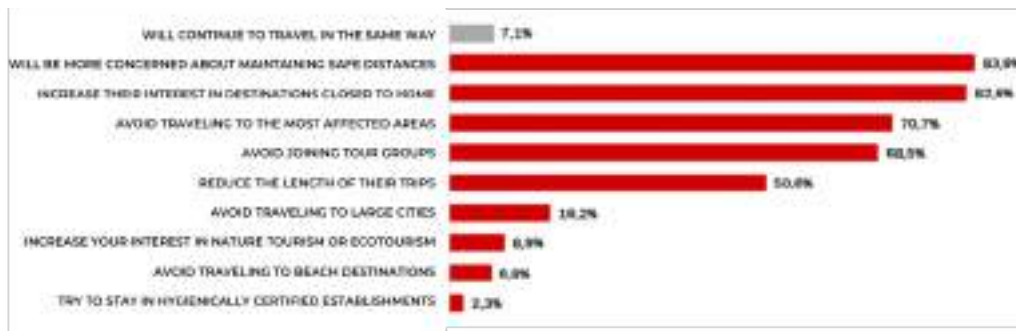
1.6.6.1. Impact on tourists choosing Bizkaia as their tourism destination



Graph 26 Impact of COVID-19 when choosing Bizkaia. Source: BTIS, 2021

These results suggest that COVID-19 has already ceased to have an impact on the travel plans of tourists who visited Bizkaia in 2021. Thus, 9 out of 10 (93.1%) indicate that it has not affected their travel plans, 4.1% had to modify their travel plans and 3.4% delayed them.

Despite the indicator in the graph above, as an interpretative hypothesis, it seems that the impact of COVID-19 on "travel habits" has been "naturalised", both in terms of prioritising destinations closer to the place of residence (proximity) and in terms of maintaining safe distances and avoiding travelling to the most affected areas and joining tourist groups.

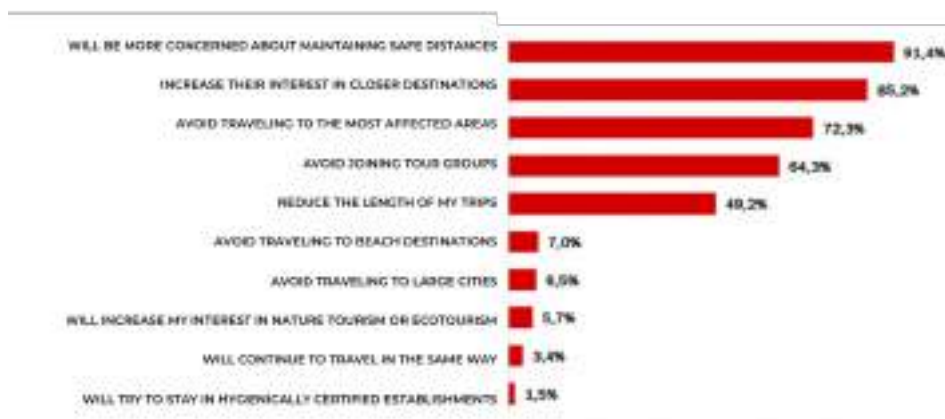


Graph 27 Impact of COVID-19 on travel behaviour. Source: BTIS., 2021

1.6.6.1. Impact on excursionists (same-day visitor) choosing Bizkaia as their tourism destination

As the impact of the pandemic has been analysed in the case of tourists visiting Bizkaia, the same analysis is carried out in the case of hikers.

COVID-19 has ceased to have an impact on the travel plans of same day visitors visiting Bizkaia in 2021 (96.3%). Despite this indicator, it seems that the impact of COVID-19 on "travel habits" has also been "naturalised", as in the case of tourists, both in terms of prioritising destinations closer to the place of residence (proximity) and in terms of maintaining safe distances and avoiding joining tourist groups.



Graph 28 Impact of COVID-19 on travel behaviour of same-day visitors. Source: BTIS., 2021



1.7. Examples of Biscay tourism private sector committed to sustainable tourism



The European Ecolabel is a certificate awarded by the European Commission to products and services that European Commission to products and services that comply with a series of environmental requirements. Specifically, there is a regulation, COMMISSION DECISION (EU) 2017/175 of 25 January 2017 on the of 25 January 2017 on the establishment of EU Ecolabel criteria.

EU Ecolabel criteria for tourist accommodation. This Standard requires environmental legal compliance, and establishes criteria Energy Efficiency, water supply management and wastewater discharge control, wastewater control of wastewater discharges, waste management, purchase of green and sustainable products, in short green and sustainable products, in short, control of all environmental aspects to prevent pollution and to environmental aspects for the prevention of pollution and climate change. In Bizkaia there are 15 accommodations with this EU Ecolabel certificate.



Las casas de EA ASTEI

The EA ASTEI Houses, especially the VITA House, is not only an exceptional place for holidays or corporate meetings. This example of Basque engineering is the first 'active' house in Spain, producing more energy than it consumes.

Simple but ingenious: The biomass boiler uses the family business's waste pine chips, thus closing the life cycle of wood and ceasing to emit CO2 into the atmosphere from fossil fuels.



Lurdeia Agrotourism 30 years ago a group of friends decided to leave everything behind to create an oasis of tranquillity and connection with nature. This oasis is called Lurdeia and is located near Bilbao, in the Urdaibai biosphere reserve. The essence of the ecological Hotel Lurdeia, Basque Country, lies in the communication with Mother Earth in a sustainable space, settling its roots in an ecological agricultural activity. Observe from within, everything around you is sacred. Love it. In the communion with the sacred, in the little things, in the contact with the earth, in the natural cycles, in the journey of life, is the treasure that we must defend with universal love in the search for happiness. The Vice-Ministry of the Environment of the Basque Government has awarded with the European Union's Ecological Label to Lurdeia Agrotourism. They have obtained the maximum qualification of energy efficiency (Level A) Bioclimatic building by the Basque energy entity.



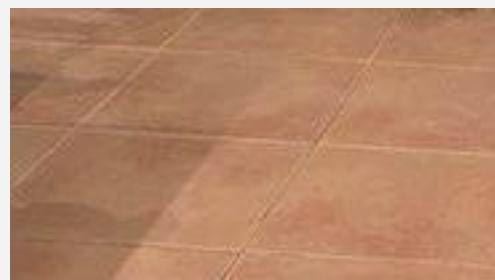
To obtain sanitary hot water and heating we use biomass (pellet) from the wood of our country's forests and thermal solar panels from vacuum tubes.

The whole building is heated by underfloor heating because it is more efficient. All taps and showers are fitted with aerators to reduce water consumption by up to 60% the wc tanks have double-flushing devices.

Most of the breakfast products are of organic origin and local products. They have been doing organic farming for 30 years and they



also plant native species such as



oaks, walnuts, ashes, beeches, fruit trees, etc. All the lighting is done by means of LED lamps and they have

installed presence sensors outside as well as in transit areas to optimize consumption. The electricity they consume is obtained from renewable energies. They select and classify the waste generated, paper, plastics, packaging, oils for subsequent recycling, etc. We use the organic waste to make compost. The cleaning and laundry products are ecological with Ecocert or Ecolabel certification. The bath gels are ecological with Ecocer certification. They also offer electric car charging.



Bodega Berroja is a family winery located in the heart of the Urdaibai Biosphere Reserve, in Muxika. At Bodega Berroja they work 24 hectares of vineyards, located at an average altitude of 250 metres above sea level. From this vantage point, they offer privileged views of the Urdaibai Biosphere Reserve, a unique and spectacular natural space. Committed to the search for new flavours that come from such a distinguished and particular enclave, they work on two fundamental milestones: SUSTAINABILITY AND SINGULARITY. Therefore, visitors enjoy the taste and aromas of Berroja's txakolis and Terroir, as well as the environment and the landscape, which allows to offer the view of picturesque places nearby and in the distance.



At Ekobideak they are committed to promoting GEOTOURISM and ENVIRONMENTAL EDUCATION. They are a team made up of Geologists specialised in various Geological disciplines (Palaeontology, Stratigraphy, Basic Geology), Environment, Sustainability, Geotourism and Geological Tourism, who develop awareness, education and participation projects. They are part of the ECO TOURISM selection of companies made by the Basque Country Government.

They seek at all times the SUSTAINABLE DEVELOPMENT of citizens and the CONSERVATION of our GEOLOGICAL HERITAGE through our projects and work, always based on the complete ACCESSIBILITY of all citizens, both physical and argumental.

Their 2 partners are Qualified Guides of the Basque Coast Geopark and Approved Guides of the Urdaibai Biosphere Reserve and the other partner is an Official Guide of the Urdaibai Biosphere Reserve (Destino Urdaibai) and an Official Guide of the Forest Therapy Institute.

Currently, Ekobideak is a member of the Ecotourism Board of Aktiba Euskadi, working and collaborating to have uniform and ambitious objectives and values on ecotourism in the Basque Country, of course, not only for Ecotourism companies, but also

promoting the values of sustainability in all associated companies and whose aim is the same as ours.

In 2020, they were selected as one of the 15 companies in the Urdaibai Biosphere Reserve (1 of the 5 Active and Nature Tourism companies) to achieve accreditation within the European Charter for Sustainable Tourism (CETS) of Europarc. These years, they are going to develop a series of commitments and improvements to achieve this accreditation.



Trekking and North Walking in Bikaia provided by Euskaditrek, one of the ecotourism accredited tourism and mountain guides by the Basque Government. They provide these services adapted to families, the elderly, children or very fit younger adults.

Sustainability is a key principle of their work.



Adventure park in a spectacular native forest, oaks, beeches, holly trees, barefoot walks through the forest, feel the different textures of nature, mud, water, earth, grass, themed areas with games. This is a company that delivers activities within the adventure park and beyond. This company is one of the ecotourism accredited tourism and mountain guides by the Basque Government.



Guided route "The mark of the tides in Urdaibai". Sailing through the Mundaka estuary in Urdaibai you can see, smell and feel the influence of the tides throughout the history of mankind. This company is one of the ecotourism accredited tourism and mountain guides by the Basque Government.



Wilextours is based in Biscay, but operates in the detailed locations due to the excellent potential for wildlife and hiking opportunities. The main target is providing an unforgettable experience for the visitors, always under the safety and quality procedure.

While sharing his passion for nature, Pablo ensures to promote appreciation and respect towards it, not only for the visitors but also for the locals who will ultimately understand

the value of it. There is no other way to recognise life unless we do protect nature and getting to know it better is the very first step towards that.

Therefore, most of these routes are accompanied by frequent stops to try local food products and visit historical buildings, which are the most significant icons of tradition and heritage, linked with the land for centuries. In fact, we cannot understand this land without its human presence, and that is why we should consider them both as a communion. This company is one of the ecotourism accredited tourism and mountain guides by the Basque Government.



Located in the town of Bermeo, next to the Biosphere of Urdaibai, is Arrizurieta farmhouse, in a beautiful enclave surrounded by nature and well connected at the same time. Arrizurieta Landetxea arises as a family initiative to contribute to the tourism development of our environment providing, above all, a place of rest strategically located on the route of nearby tourist destinations such as Bermeo Gaztelugatxe, fisherman's museum in the Ercilla Tower, "Aita Guria", ...), Bakio, Mundaka, Bilbao, ... which also has a bus stop.

With the European seal of Ecological Rural House, this establishment makes a continuous effort to reduce its environmental impact, protecting and conserving the environment in order to contribute to the sustainability of natural resources, without affecting the comfort of the guest.

The facilities of the farmhouse combine wooden structure and stone walls, with modern comforts and resources respectful of the environment such as (hot water sanitary) A.C.S. by solar panels, underfloor heating, fireplace, ... that provide greater comfort.



Troka Abentura was born as an Active Tourism and Adventure Sports company on July 1st, 1999, after two adventure companions decided to share their hobbies and illusions with others.

Almost 20 years of professional work, hours of illusion, joys and emotions and the unconditional support of their clients have made them a leading company in the sector. They have learned and adapted our activities and experiences to the different demands of our clients.

Troka stands by responsible tourism with their Troka Commitment. By choosing Troka, the clients choose a commitment to society and the environment based on principles where people and the environment are the priority.

Troka states the following:

- All the people who develop our work in Troka have the corresponding employment contract in force and for the totality of the hours, it seems obvious but unfortunately it is not always so in the labor market.
- We also have an Occupational Risk Prevention and Health Surveillance service in accordance with the needs of our jobs.
- All the personnel has a training and experience adequate to the level of the activities, in order to achieve the best performance in our experiences and tasks.
- All our services are invoiced, with their corresponding taxes. Troka's preferred method of payment is by bank transfer, which facilitates transparency.
- For the development of our experiences we have the corresponding permits from the various competent authorities, and we pay the corresponding fees or taxes for the use of public domains.
- Before carrying out any experience or activity we analyze its possible environmental impact and we work to minimize it.
- In order to offer you a better service, we have civil liability and accident insurance with adequate coverage for the activity we carry out.
- Your safety is our safety. When we start up the experiences and activities we analyze all the possible risk factors that we may encounter and we look for the most appropriate practices to minimize them.
- We have internal control systems that facilitate the management and detection of safety materials in poor condition or expired, which are immediately renewed for the safe enjoyment of the experiences. And this same system helps us to improve our work practices.
- We work according to quality standards designed by the company itself. We participated in the drafting and implementation of the Q quality mark for active tourism, and today we have evolved to our own system adapted to the unique characteristics of our company.
- Innovation is part of the company's daily work, we are committed to it and its various fields, product innovation with new experiences, innovation in management by creating our own management software that facilitates all our work and information.
- Our experiences show and make live part of the life and culture of our people. Culture and customs are a heritage that we respect, care for and make known.

1.8. Examples of Biscay tourism public sector committed to sustainable tourism

In line with this, the [UNESCO Biosphere Reserve of Urdaibai](#) has done a campaign for visitors to enjoy the reserve using public transportation, either bus, train, bike or on foot, or a combination of these. This county has obtained the [European Charter of Sustainable Tourism](#) and it is promoting responsible visitors.



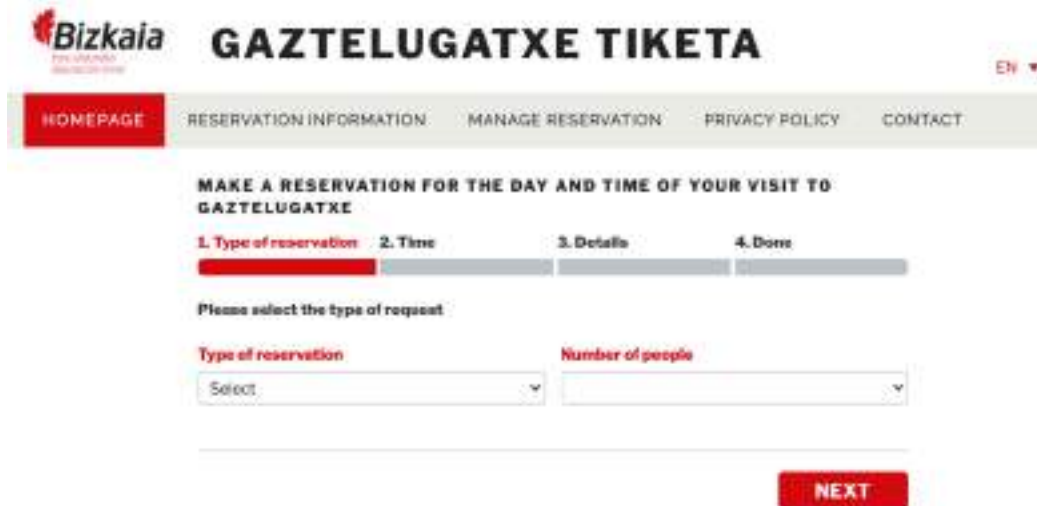
The image shows a screenshot of the Urdaibai website. At the top, there is a navigation menu with the following items: QUEVER, QUÉ HACER, ALQUILEROS, **TURISMO SOSTENIBLE**, PLANEA TU VIAJE, and a language dropdown menu set to 'Español'. Below the navigation is a large banner illustration of a person on a bicycle and a person on a motorcycle riding on a road through a landscape with green hills, trees, and a bright sun. Below the banner, the text 'TURISTA RESPONSABLE EN URDAIBAI' is displayed. Underneath, there is a list of 10 points for responsible tourism:

1. Conoce tus derechos
2. Fomenta el desarrollo local
3. Fomenta un trato adecuado a las personas trabajadoras
4. Respeta la diversidad
5. Disfruta de la cultura vasca
6. Contribuye a la conservación del patrimonio
7. Contribuye a la preservación ambiental
8. Elige productos y servicios sostenibles
9. Utiliza el transporte sostenible
10. Sé un turista responsable

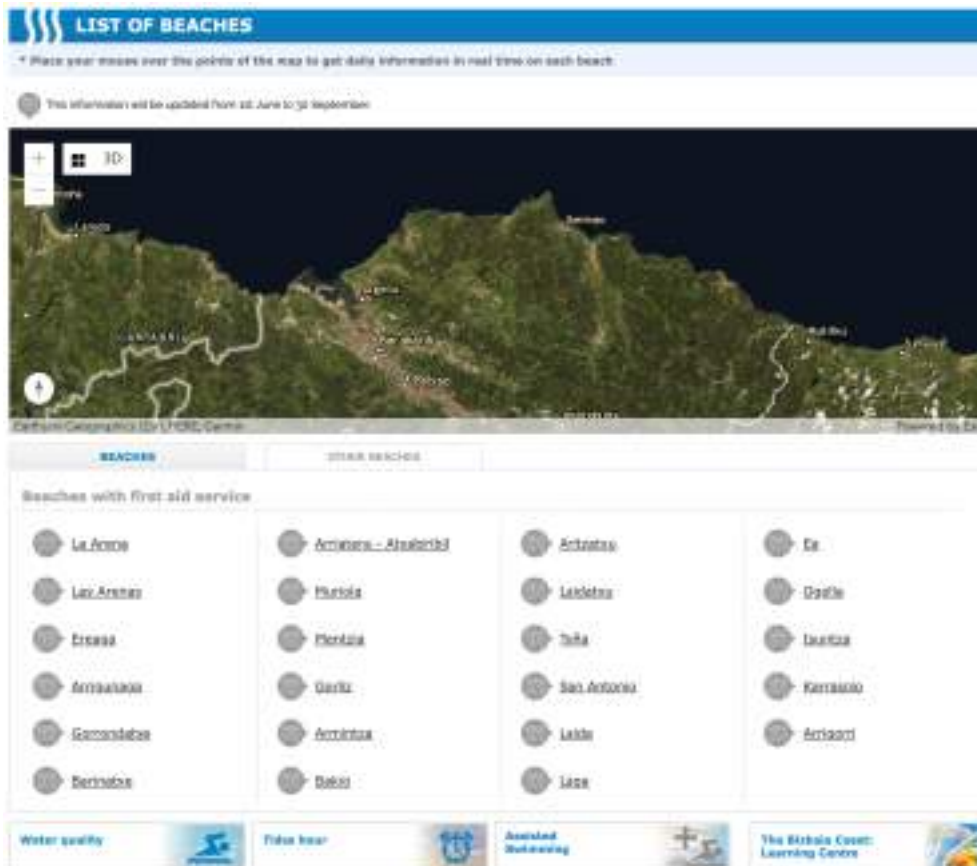
Below the list, there are four small promotional cards, each with a play button icon and a title:

- PLAYAS**: *¿Alguien se queja de las duchas?* (Illustration of a person showering outdoors)
- ESPACIOS NATURALES**: *¿Alguien siempre atado?* (Illustration of a person walking a dog in a natural area)
- MOVILIDAD SOSTENIBLE**: *¿Alguien evita malos humos?* (Illustration of cars and a person talking about emissions)
- GAZTELUGATXE**: *¿Tus desperdicios van contigo hasta el contenedor?* (Illustration of people recycling)

The [Bizkaia Provincial Council](#) manages the [protected Biotope of San Juan de Gaztelugatxe](#) and for visitors to enjoy it in a sustainable way a [ticket booking system](#) is implemented with a maximum quota per 2 hours. This implies that visitors need to book in advance their visit. Moreover, nearby municipalities such as Bermeo have been promoting Sustainable Mobility offering the combination of a guided visit to the Biotope and the municipality which included a coach, this way visitors do not have to use their own private vehicles.



The Department for Sustainability and the Natural Environment of the Bizkaia Provincial Council has a web portal for the **safe use of beaches**. Visitors to this site can find out about the quality of the water, the conditions of the water in terms of it being safe to swim, infrastructures and services available in the beaches, as well volume of flows during COVID-19 pandemic with the green light system. This is updated every hour during the summer months.



The Department for Sustainability and the Natural Environment of the Bizkaia Provincial Council has developed an Integrated Plan for the Prevention and Management of Waste

of Local Competence of Bizkaia 2030 (PIGRB 2030), the future Provincial Regulation that includes the planning in this area throughout this decade. The new plan includes the priority objectives defined after an exhaustive analysis of the current situation, future forecasts and the strategies of other supra-territorial institutions and will be contrasted throughout the first half of this year with the local councils and citizens of the territory. This document lays the foundations for waste management in Bizkaia in the current decade. For this time horizon, this plan sets as priority objectives the reduction of waste generation by 15% and the recovery of 4.9 out of every 5 kilos of waste generated.

The same department has approved a **new call for grants** aimed at town councils and associations of municipalities to carry out studies for planning on **climate change** and **energy transition** (100,000 euros), **actions in lighting** (300,000 euros) and **public buildings** (400,000 euros) and has added a new line for the **purchase of electric and rechargeable hybrid vehicles** (200,000 euros). The grants, which will be awarded on a competitive basis, can be applied for through the regional government's electronic headquarters until 28 February.



The Basque Country has a network of facilities managed by the Basque Government, the Ekoetxea Network, dedicated to environmental interpretation and to raising public awareness of the care and conservation of the environment and the abundant natural wealth of our territory.

Every year, the environmental interpretation centres in the Basque Country are visited by 100,000 people and 25,000 schoolchildren who have the opportunity to experience what the environment is and the value it has in their lives, thanks to the numerous activities they organise throughout the year.

1.9. Common Issue Areas in the destination

The issue areas are as follows:

- Visitor spending is regarded as an opportunity for growth, specially beyond accommodation and gastronomy.
- The destination counts with room for improvement on volume of value-added experiences and services.
- The private sector needs to improve their digital skills in general and especially in digital marketing and e-commerce.
- In terms of sustainability: the destination identifies the need for knowledge on the carrying capacity of certain points in order to improve its management, distribution of flows and sustainable mobility. There are certain areas where there is a high influx of people mainly using their own vehicles and parking spot

challenges are present. The destination needs to work on increasing sustainable practices of current demand and supply and attracting specific potential demand that is already implementing sustainable practices in their travels.

- Data culture: there are opportunities to further develop this culture, the use of data for decision making by local private and public actors.
- As in many destinations, COVID-19 has also impacted tourism in Biscay, resulting in the low international demand that the destination is registering since the beginning of the pandemic and the risk of bankruptcy of micro-SMEs.

1.10. Issues that cause the greatest impacts in the destination and their evolution in the last years

All of the issues mentioned in the section above produce a significant impact on tourism in Biscay. The region needs to advance in the following areas:

- Territorial balance through tourism
- Improving the survival of enterprises
- Improving competitiveness
- Digitalisation
- Reinforcement of governance of public-private partnership
- Reactivating tourism demand
- Reinforcing resources and strengthening marketing

Over the past years, especially due to COVID-19, the need for reactivating tourism demand, digitalizing the industry and helping enterprises to survive has evolved most rapidly.

1.11. Current issues that the destination is working on

The destination has been working on all of the issues mentioned above for some time, acknowledging the impact that they have on the tourism development of the region. Now, in the light of the current COVID-19 pandemic, there is a stronger emphasis on tackling and trying to face those issues, especially in terms of reviving the tourism sector and improving competitiveness in the destination along with stronger marketing campaigns and digitalization. Competitiveness, Digitalization, Sustainability and Inclusiveness are the key areas that the destination is currently working on further developing.

In order to address this, apart from the everyday work in collaboration with the tourism sector, Bilbao Bizkaia is developing products adapted to the new trends in demand and reorienting the promotional actions to the situation of the markets, without forgetting

the effort being made to formulate a strategy with a long-term vision in terms of sustainability together with the rest of the agents in the tourism ecosystem.

1.12. Areas where more advances are needed in the near future

The challenges are to recover tourism and ensure that the activity generates a sustainable socio-economic impact on the territory, improve the competitiveness of the business fabric, attract visitors and develop the destination in a balanced and sustainable way, consolidate the international positioning of the destination and strengthen its image in the markets, improve the tourism experience and visitors' and residents' satisfaction, digitalise the destination and its businesses and strengthen the governance model and tourism intelligence system.



2. Biscay Tourism Intelligence System

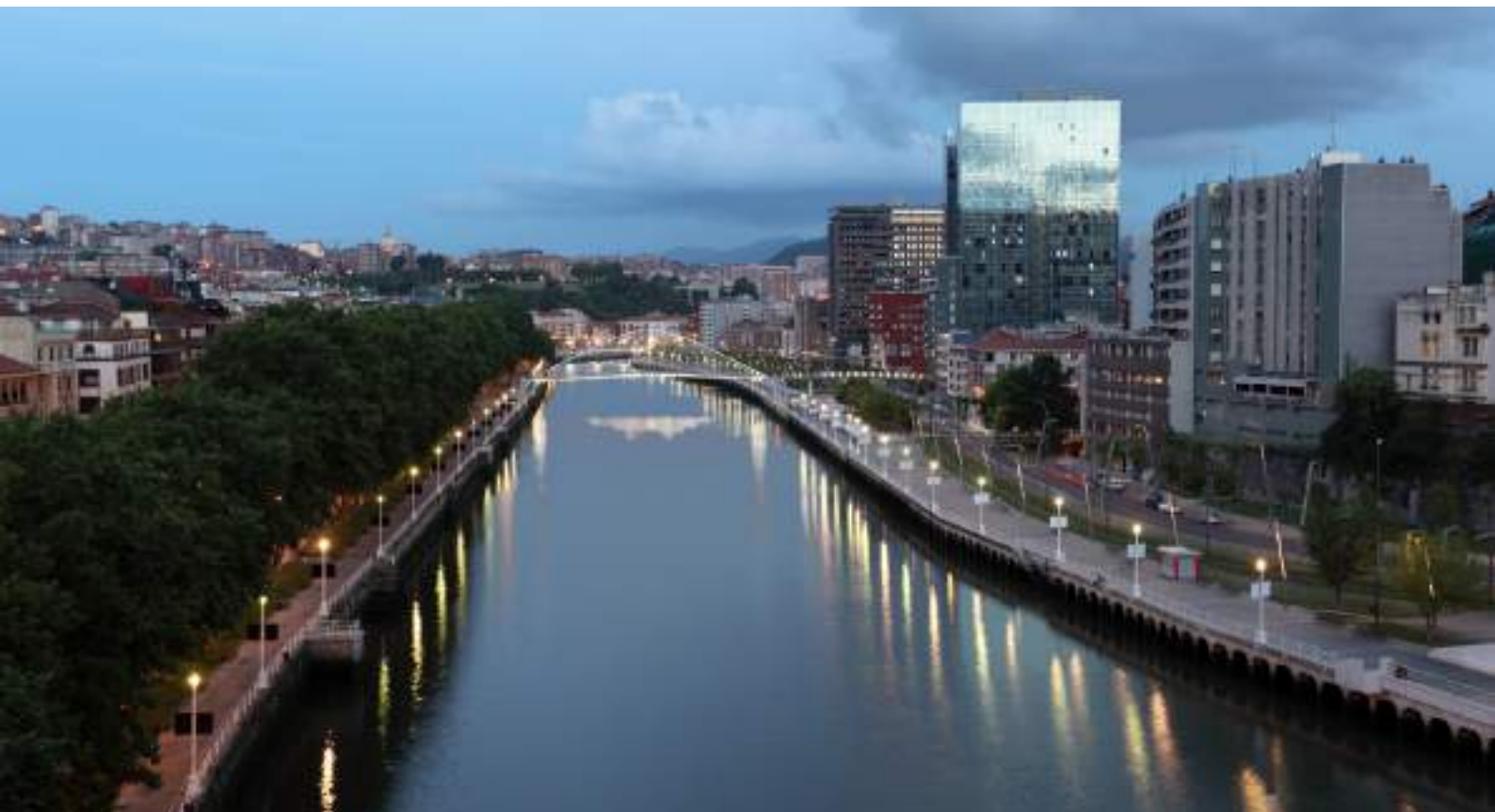
Biscay Tourism Intelligence System (BTIS) was created in 2009 and is funded exclusively by Biscay 's provincial council. When starting to develop its activity, it managed indicators such as number of hotel establishments; occupancy rates; number of arrivals, overnight stays; average length of stay; source markets, type of accommodation; type of tourism; tourism expenditure; tourist products and traveller profile. Over the years, the tourism activity in Biscay has been increasing and has become one of the sectors with the greatest growth potential in the region. For this very reason, in 2017 a roadmap was presented to guide the destination's strategy towards the consumer and to promote sustainable territorial development, leading the complex and transversal tourism sector towards better sustainability. Since 2019, the BTIS has been based on the axes/objectives of the 2020 Tourism Strategy, which aimed to bring better competitiveness to the destination:

1. Attracting the desired segments of potential consumers;
2. Distributing tourist flows over time (mitigating seasonality) and space;
3. Creating an active and functional organisational network;
4. Digitalising the tourism sector;
5. Introducing an efficient intelligence and measurement system for the tourism sector;
6. Improving the qualification of the tourism industry workforce;
7. Providing authentic experiences tailored to the demand;
8. Integrating and making visible the benefits of tourism for the society.

Based on these objectives, seven strategic lines were defined for the BTIS, which indicate how the objectives are to be achieved:

- Collaboration
- Consumer orientation
- Innovation and excellence in tourism
- Transparency and response to results
- Integrated destination management
- Research-based decisions
- Economic, social, and environmental benefits

In that same year, 2019, the new horizon for the tourism sector was defined and has been the one taken into account until recently, which involved aligning the efforts of the tourism management bodies, as well as business associations.



2.1. BTIS Mission, Vision and Values



Mission: Biscay Tourism Intelligence System supports the decision making for Bizkaia to achieve its strategic goals.

Vision: To become a Tourism Intelligence System at the service of the agents that make up the tourism ecosystem of the Bilbao Bizkaia destination. An intelligence system that generates and shares knowledge to make decisions that enable progress to be made in the new vision of the destination defined for the 2030 horizon and the achievement of its strategic objectives over time. The tourism intelligence system will respond to the new tourism strategy of Bilbao Bizkaia in terms of sustainability formulated from the participation and cooperation of the different agents of the destination and the search for territorial balance.



Values: Sustainable, Competitive, and Inclusive destination committed to the well-being and balance of both, residents, and tourists.

2.2. Main Objectives of BTIS

Its main objectives are:

To get a holistic insight on the tourism offer in Biscay, from the accommodation capacity to the diversification of leisure, cultural or environmental activities that affect tourism activity in the territory



To understand the behaviour of visitors in Biscay using the parameters such as tourism expenditure, satisfaction with the destination, mobility, the type of activities carried out or the processes of inspiration and planning to arrive in the territory



To analyse the demand by means of official and stable sources, in order to assess the main parameters related to the flow of visitors on a monthly, seasonal, and annual basis

To monitor tourism flows and the behaviour of visitors in the counties of Biscay in order to know the particularities of each of the tourism areas of the territory



To analyse the phenomenon of same day visitors in Biscay. This indicator had never been measured by the Observatory before and was included in 2019 as an improvement

To parameterise the business climate and the impact of the activity on companies in the tourism sector in order to measure the return and viability of tourism for the private sector



To determine the positive and negative impacts of tourism activity on the inhabitants of Biscay in order to be aware of the possible attitudes that the society may be expressing with regard to tourism

To create reports of public or sectorial interest and distribute them through the digital channels of the Provincial Council of Biscay



To develop a data system capable of compiling data and generating specific reports of interest to the Department of Economic and Territorial Development



To collaborate and coordinate the transmission of information with organisations in the territory capable of collecting data and information that may be of interest to tourists.



2.3. Timeline

The graph presented on this section shows the timeline of the different areas that are measured within BTIS's activity. Looking at the graph, INSTO's mandatory issue areas are identified in red, and other areas that are measured by the BTIS are represented in gray. Prior to the submission of this INSTO application, BTIS was already monitoring the following INSTO mandatory issue areas: Tourism Seasonality, Employment, Destination economic Benefits, Governance, Local Satisfaction and Accessibility. During the preparation of the application the mandatory issue areas, Energy Management, Water Management, Climate Action, Wastewater Management and Solid Waste Management have been incorporated into the annual report produced by BTIS. Hence, **all INSTO mandatory issue areas are currently being monitored by BTIS.**

In the graph, the arrows indicate the periodicity with which these areas are monitored. If the line continues to the end of the timeline, it means that, that specific area is monitored throughout the year. In relation to the shorter arrows, as in the example of market research and active listening, it is an area that is being monitored, but not throughout the year, it is monitored in certain specific periods.

Regarding other components that the BTIS wants to measure, the BTIS values monitoring tourism flows from a more technological perspective. Currently, the way in which flows are monitored is through surveys of both tourists and same day visitors to find out the most visited places during their stay in Bizkaia; However, BTIS considers it important to complement this monitoring with Big Data sources.

On the other hand, throughout this year BTIS is also considering starting to use data on flight searches to Bilbao airport in order to anticipate demand and analyse the performance of the marketing campaigns.

Timeline

→ INSTO Mandatory Issue Areas
 → Other Areas



Figure 7 Figure 11 Timeline of topics that are being measured and others to be added by BTIS.

2.3.1. Preliminary objectives for the first reporting year that will be discussed in the stakeholder's workshop.

The objectives are improving and providing visibility to sustainability measuring which is currently conducted. Every year, the BTIS generates a report that gathers all the data collected and analysed throughout the year (annual report). This annual report will reflect this improvement and visibility.

Moreover, the BTIS needs to incorporate all the new indicators connected with the new strategy 2030 that has recently been published



3. MONITORING PROCESSES

3.1. Current structures and procedures of monitoring and reporting

Biscay Tourism Intelligence System has been working for more than 12 years on monitoring data on tourism supply and demand in order to collect the statistical information about Biscay. The reports are produced for the BTIS by external suppliers. Reports are available in the following website:

<https://www.visitbiscay.eus/es/web/profesionales-y-medios/estadisticas>

Monitoring reports can be found within the “Professionals” area of the website and in the “Statistics” section. There, the user can filter either by type of monitoring report or by year as it can be seen on the image below

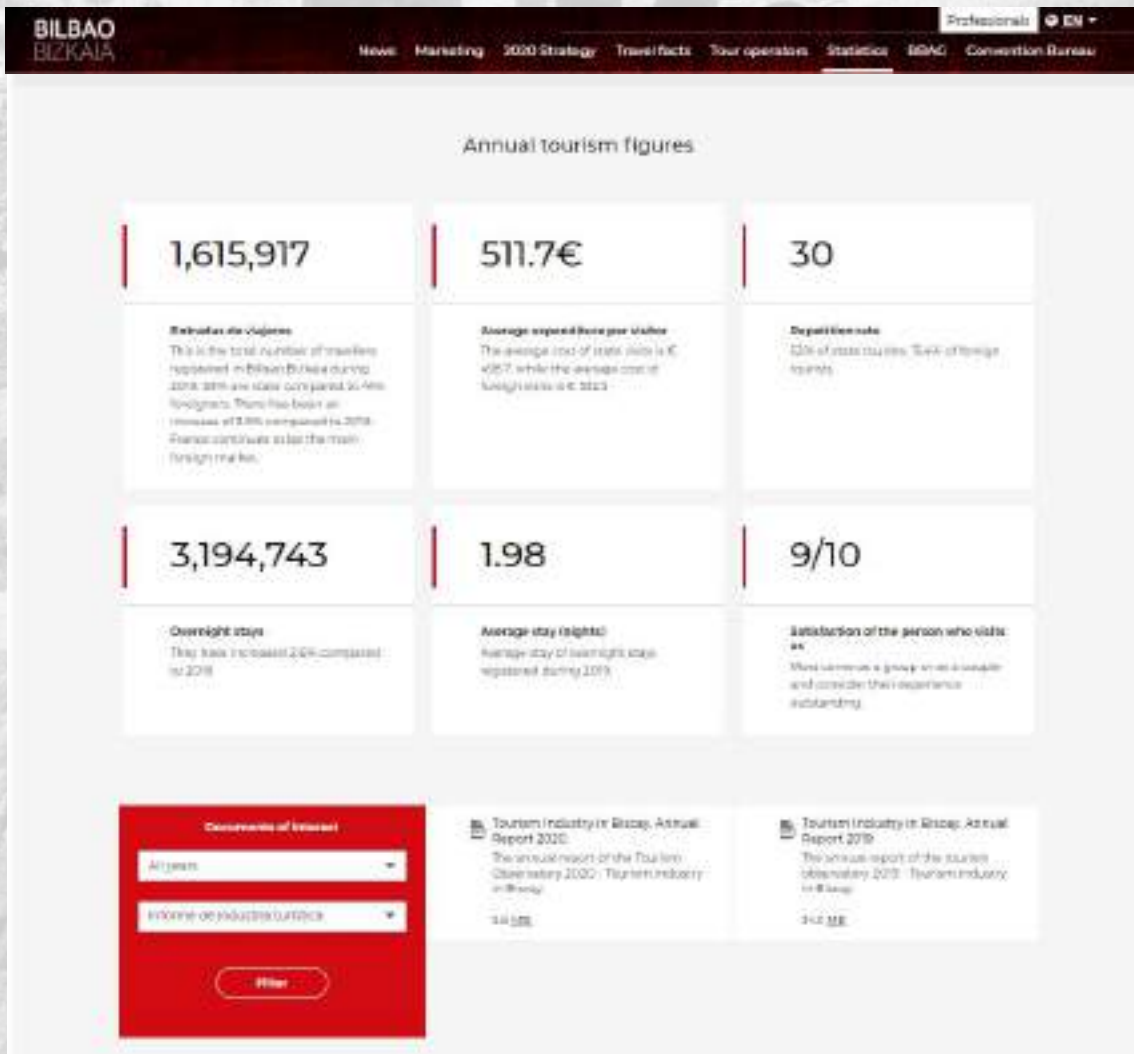


Figure 8 Biscay Tourism Intelligence System's Website.

3.2. BTIS reports that are available at the time of the INSTO application

The reports available at the time of application are divided into 3 groups: monthly reports, seasonal reports, and annual reports. Some of these reports can be found on the BTIS's website and some of these are not public due to the disaggregation of the data.

3.2.1. Monthly reports



Every month, Biscay Tourism Intelligence System produces reports that require the search for information and indicators through official statistics on both the supply and demand of tourist activity in Biscay.

Undoubtedly, the Survey on Tourism Establishments (ETR is the Spanish acronym) provided by EUSTAT, the Basque Institute of Statistics is a great source of official

information that is used for generating the reports. Furthermore, data provided by the National Statistics Institute (INE), the State's Public Employment Service (SEPE) and AENA (a state-owned company in charge of managing the airports of Spain) is also used for the monthly reports.

3.2.2. Seasonal Reports

After the summer season, the BTIS produces a report gathering the information obtained from the monthly reports for June, July, August, and September. The indicators and sources (secondary sources) used for this report are the same as the ones from the monthly reports.

Furthermore, there are other three summer reports developed with information gathered from collecting primary data:

- Report on the Tourist Profile:

This is a report that aims to analyse the socio-demographic profile of tourists, while also integrating data on their expenditure, the activities carried out, as well as their perceptions of their travel experience in Biscay. In the process of primary data collection for the summer of 2020, a series of new questions was introduced based on new knowledge needs arising from the previous experience of the Biscay Tourism Intelligence System, as well as the impact of COVID-19 pandemic.



- Same-day Visitor Report:



This report aims to analyse the socio-demographic profile of same day visitors of Biscay while also integrating data on their expenditure, the activities carried out, as well as their perceptions of their own travel experience in Biscay. Just for like the Tourist Profile Report, in the process of primary data collection for the summer of 2020, some new questions were introduced based on new knowledge needs arising from the previous experience of the Biscay Tourism Intelligence System, as well as the impact of COVID-19 pandemic.

3.2.3. Annual Reports

Annual reports are based on both secondary data from official statistics and primary data collected. Annually, the BTIS creates the following reports:

- Residents' perception on tourism

This report aims to understand the perception of Biscay's residents about tourism in the territory by carrying out an analysis of the impact of tourism on Biscay's society. This includes the levels of satisfaction with the development of the tourism activities, the perception of the scale of the activity in the territory and the population's understanding of the public policies developed by the local and territorial institutions.



- Tourism Industry Monitoring



This report is based on primary data. It analyses the situation in the tourism industry in Biscay, in particular the evolution of the tourism business sector in Biscay, assessing the economic, employment, development, participation factors, as well as satisfaction with public

tourism policies indicated by the sector's representatives.

- Tourism activities supply Report

This report's main objective is to analyse the tourism offer in Biscay, including the distribution of the provided tourism products and services across the territory, from the perspective of the economic activities associated with the tourism sector and their annual evolution. It aims to:



- Analyse the distribution of companies of the tourism sector across territory of Biscay and its annual variation;
- Estimate the number of employees engaged in different economic activities linked to tourism in Biscay and its annual variation;
- Analyse the accommodation sector in greater depth;
- Analyse in depth the supply of tourism activities in Biscay.

- Annual Report:

This report gathers the information produced and analysed within a one-year timeframe, including data from both primary and secondary sources and providing an overview of the tourism sector in Biscay from both demand and supply perspectives.

Only a simplified version of the report is made available to the public, as the original report may contain sensitive data.



3.2.4. Other relevant reports

- Zugaztel: Social Media Conversion Report.



Zugaztel is a Public Provincial Company created in 2009, entrusted with the provision of specialised services to ensure the mass entry of data into the information systems and to facilitate communication with citizens through the different channels. This company provides the

BTIS with monthly reports on the BTIS's website and social media conversion rates. The social media that are analysed are Twitter, Facebook and Instagram. The report on the website analyses the following variables:

- Number of sessions, evolution of sessions throughout the month;
- Number of users;
- % of new and returning visitors;
- Type of search;
- Average duration of a session;
- Languages used;
- Rebound, %;
- Main countries;
- Age & gender;
- Number of pages visited;
- Most visited pages on the website;
- Exit pages.

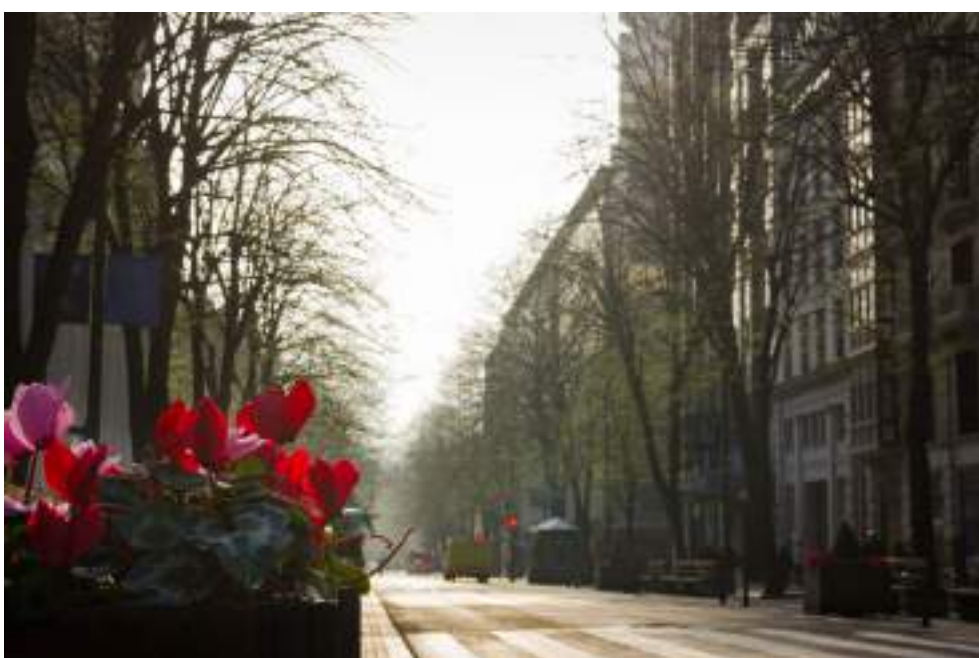
The report on social media analyses different variables:

- Tweets/Posts;
- Number of visits to the profile;
- Mentions;

- Impressions;
- Followers / evolution of followers;
- Likes;
- Shares;
- Clicks;
- Scope;
- Answers / comments;
- Top tweets / posts;
- Instagram stories activity.

- Active Listening Report:

This report aims to understand the visitors' state of mind, their emotions, their feelings, and their desires. The questions that this report intends to answer concern the visitor's suggestions, statements, and complaints with the aim of generating more visitor satisfaction in the destination by actively listening to the visitors. This report has not been carried out systematically; the first report was created in 2016, and the second one in 2020. It is planned to issue the report systematically in future.





3.3. Beginning and evolution of specific monitoring processes and how their long-term viability is secured.

Biscay Tourism Intelligence System has been monitoring the tourism sector of the region for more than 11 years. It first started by carrying out interviews during different months of the year and analysing data from secondary sources and generating monthly reports. Then, year by year the BTIS has been including improvements in data collection methods based on the needs that have been emerging throughout the process. These reports are also shared with the private sector and the tourism management bodies at county and local level. The improved quality of the reports is appreciated by the private and public sector, as this gives them a deeper insight on the industry and guide them in the process of decision-making.

The support of the private and public sector ensures the stability for the BTIS and its evolution over time, responding to the strategic questions for the destination and the value chain, in order to remain relevant for the stakeholders.

The Provincial Council of Biscay is fully committed to continue advancing on this BTIS, to accomplish its vision. The BTIS's long-term viability of course will be secured if private and public stakeholders see it as a useful and decision-making tool.

Among its activities, the BTIS holds internal meetings every two weeks to discuss reports and to focus on the next steps to follow. Moreover, there is a transparency exercise since every year a press conference is organised to make the key figures available to the public and these are explained. These meetings help with securing a longer-term viability for the activity of the BTIS.



4. INDICATORS AND SOURCES

This chapter gathers the indicators measured by BTIS within the UNWTO INSTO issue areas, and then other indicators measured by BTIS beyond the issue areas.

4.1. UNWTO INSTO issue areas' indicators measured by BTIS

The following sections gather each issue area and embody the tables with the indicators, the source and it states if these are available and if they are monitored.

If they are monitored, evidently they are available, hence it will state M. If they are available but not monitored it will state A. If they are not available, evidently they cannot be monitored, hence it will state NA (not available).

4.1.1. Local satisfaction

Component of the issue	Indicators	Monitoring & Availability	Source
Degree of local satisfaction with tourism	Percentage of residents who are satisfied with tourism in the destination	M	Biscay Provincial Council
	Percentage of residents satisfied with the impacts of tourism on the destination's identity and life's quality	M	Biscay Provincial Council
Community attitude toward tourism	Local satisfaction with tourism, local culture, integrity, authenticity and with other specific components of tourism	M	Biscay Provincial Council
	Number of complaints by local residents related to tourism (UNWTO)	A	Biscay Provincial Council
Visitor - resident ratio	Number of tourists and visitors per 100 residents (ETIS)	M	EUSTAT
	Number of beds available in commercial accommodation per 100 residents (ETIS)	M	EUSTAT
	Number of second homes per 100 homes (ETIS)	M	Housing Department, Basque Government
	Number of tourists per km ² , ratio of tourists to locals (UNWTO)	M	EUSTAT
	Ratio of tourists to locals at events, ceremonies (UNWTO)	NA	-
	Number of services, infrastructure, architecture preserved, provided	NA	-

Component of the issue	Indicators	Monitoring & Availability	Source
Social benefits associated with tourism	for residents attributable to tourism (UNWTO)		
	Price of real estate in the destination (UNWTO)	M	Housing Department, Basque Government
	Percentage of housing affordable for residents (UNWTO)	A	Housing Department, Basque Government
Housing issues	Percentage of increase/decrease in land and housing prices over time (UNWTO)	A	Housing Department, Basque Government
	Percentage of construction and new housing available for living purposes (for the local population) (UNWTO)	A	Housing Department, Basque Government
	Percentage of construction and new housing available for tourism (UNWTO)	NA	-
Economic barriers	Availability and access to goods and services (health, water, transport, food, accommodation etc.) for residents/availability and access to goods and services for tourists (UNWTO)	NA	-
	Cost of access (entry) to important attraction sites expressed in hours work at local wage (UNWTO)	NA	-
Quality of neighbourhoods	Noise and congestion levels caused by tourism near residential areas (UNWTO)	NA	-
Resident's attitude towards tourism	Tourism benefits the image of Biscay	M	Biscay Provincial Council
	Most positive aspects of tourism in Biscay	M	Biscay Provincial Council
	Most negative aspects of tourism in Biscay	M	Biscay Provincial Council

4.1.2. Economic benefits

Component of the issue	Indicators	Monitoring & Availability	Source
Business investment in tourism	Number of tourism businesses in the community and % owned locally	M	EUSTAT
	Asset value of tourism businesses	NA	-
	Longevity of tourism businesses	M	Biscay Provincial Council

Component of the issue	Indicators	Monitoring & Availability	Source
	Number of tourist nights per month (distinguishing domestic and international tourists classified by main countries of residence) (ETIS) (InRouTe)	M	EUSTAT
Tourism flow	Number of same-day visitors per month (ETIS)	A	INE
	Relative contribution of tourism to the destination's economy (% GDP) (ETIS) (UNWTO)	M	EUSTAT
	Daily spending per overnight tourist (ETIS)	M	Biscay Provincial Council
	Daily average expenditure by tourists (InRouTe)	M	Biscay Provincial Council
Revenues generated by tourism	Daily spending per same-day visitor (ETIS)	M	Biscay Provincial Council
	Total fees collected by the destination for the access and use of attractions (UNWTO)	NA	-
	Public revenue from tourism business permits, licenses, concessions and taxation compared to visitor arrivals (UNWTO)	NA	-
	Average length of stay of tourists (nights) (ETIS)	M	EUSTAT
Tourism enterprise(s) performance	Occupancy rate in commercial accommodation per month and average for the year (ETIS)	M	EUSTAT
	Occupancy rates in accommodation establishments (UNWTO)	M	EUSTAT
	Number of tourism-related enterprises (establishments) (categorized by size and type) (UNWTO)	M	EUSTAT
	Percentage of tourism involved businesses owned locally/externally (UNWTO)	NA	-
	Asset value of tourism businesses and percentage owned locally (UNWTO)	NA	-
Vitality of the local tourism industry	Birth rate of enterprises/establishments in the tourism sector (InRouTe)	M	Biscay Provincial Council
	Longevity of tourism businesses (rate of turnover) (UNWTO)	M	Biscay Provincial Council
	Annual profits of tourism businesses (UNWTO)	NA	-
	Tourism business revenues (growth rates) (UNWTO)	NA	-

Component of the issue	Indicators	Monitoring & Availability	Source
Impacts of tourism on local income	Ratio of income attributable to tourism versus other income generating activities (UNWTO)	A	EUSTAT
	Cost/price ratios (including gross margin) of tourism businesses (accommodation, attractions, tours, packages, etc.) compared to industry norms or ratios for similar products at other destinations (UNWTO)	NA	-
Competitiveness of tourism businesses	Percentage of tourism businesses participating in cooperative marketing (UNWTO)	A	Biscay Provincial Council
	Percentage of marketing expenditures in cooperative initiatives (UNWTO)	A	Biscay Provincial Council
Economic, sociocultural and environmental impact of tourism	Economic factors of tourism impact	M	Biscay Provincial Council
	Sociocultural factors of tourism impact	M	Biscay Provincial Council
	Environmental factors of tourism impact	M	Biscay Provincial Council
	Positive impact of tourism	M	Biscay Provincial Council
	Benefits of tourism related to Biscay's image	M	Biscay Provincial Council
	Negative impacts of tourism	M	Biscay Provincial Council
Resident's attitude towards tourism	The economic sector that brings the most wealth to Biscay %	M	Biscay Provincial Council
	Relevance of tourism in the local economy	M	Biscay Provincial Council

4.1.3. Employment, HR/Labour

Component of the issue	Indicators	Monitoring & Availability	Source
Quantity and quality of employment	Number and percentage of tourism employees by industry (accommodation, restaurants, other tourism industries) compared to total employment in the destination (ETIS)	M	EUSTAT
	Percentage of jobs in tourism that are seasonal (ETIS)	M	EUSTAT Social Security

Component of the issue	Indicators	Monitoring & Availability	Source
	Ratio of part-time to full-time employment in tourism (UNWTO)	M	Biscay Provincial Council
	Percentage of tourism employees who are locals (UNWTO)	NA	-
	Percentage of jobs that are full time, full year (UNWTO)	A	EUSTAT
	Local unemployment rate in low, off, shoulder and peak seasons (UNWTO)	M	EUSTAT, SEPE, SOCIAL SECURITY
	Retention levels of employees in the tourism sector (percentage of turn over) (UNWTO)	M	EUSTAT, SEPE, SOCIAL SECURITY
	Average tourism wages compared to the average wage in the destination (UNWTO)	A	INE
	Income levels (absolute and compared with other sectors) (UNWTO)	A	INE
	Average wages and salary income corresponding to the different job categories in tourism (accommodation, etc.) (InRouTe)	NA	-
	Employee satisfaction (UNWTO)	NA	-
	Weekly working hours and workday sequences in tourism jobs	NA	-
	Ratio of time dedicated to working in tourism versus income from tourism (income per hour worked) (UNWTO)	NA	-
	Employment rate of tourism-related service jobs: local vs not local employees	NA	-
	Employee satisfaction with tourism-related service jobs (freely based on ZTS 2030)	NA	-
Gender equality in tourism	Percentage of men and women employed in the tourism sector (ETIS) (UNWTO)	M	Biscay Provincial Council
	Percentage of tourism enterprises where the general manager position is held by a woman (ETIS)	NA	-
	Female average income/male average income in the tourism sector (or: percentage of women/men in different tourism income-earning categories) (UNWTO)	A	INE
	Percentage of women/men in unskilled, semi-skilled and professional positions in the industry (UNWTO)	M	Biscay Provincial Council

Component of the issue	Indicators	Monitoring & Availability	Source
	Percentage of tourism businesses registered under women/men or owned by women/men (UNWTO)	NA	-
	Female labour participation	M	Biscay Provincial Council
Access of tourism employees to health and safety	Percentage of tourism sector employees receiving free/subsidized health checkups and clinics for staff and family members (UNWTO)	NA	-
	Percentage of tourism sector employees receiving health insurance sponsored/subsidized by the employer (UNWTO)	NA	-
Family support for tourism employees	Percentage of workplaces in the tourism sector providing child care facilities (UNWTO)	NA	-
	Percentage of workplaces with family- friendly rostering (work shifts and rotation) (UNWTO)	NA	-
	Existence of initiatives that focus on family-friendly working conditions (Guidebook STGD)	NA	-
Education, training, capacity development in tourism	Percentage of employees qualified/certified (UNWTO)	M	Biscay Provincial Council
	Training funds spent per employee in the tourism sector (UNWTO)	NA	-
	Number of scholarships and training opportunities in tourism for the youth (UNWTO)	A	Basque Government, Biscay Provincial Council, Deusto University, Vocational Training Centers
	Number of educational programs/institutions in the destination incorporating sustainable tourism into their curricula (UNWTO)	A	Deusto University and Vocational Training Centers
	Number of qualification programs publicized to tourism stakeholders by the DMO per year (Guidebook STGD)	A	Biscay Provincial Council
	Number of training and continuing education courses offered per DMO associate per year and percentage of these on sustainable development (Guidebook STGD)	A	Biscay Provincial Council
	Number of educational programs in tourism (for trainees/students) and trainings on the job for lifelong learning (employees/entrepreneurs) incorporating foreign languages (apart from English), regional knowledge and digital capacity in their curricula	A	Deusto University and Vocational Training Centers

Component of the issue	Indicators	Monitoring & Availability	Source
	Percentage of tourism enterprises with employees receiving training	NA	-
	Percentage of labour force trained in higher tourism-related quality services, in fields such as health treatments or nature experience	NA	-

4.1.4. Seasonality

Component of the issue	Indicators	Monitoring & Availability	Source
Degree of seasonality	Degree of seasonality	M	EUSTAT
	Tourist arrivals by month or quarter (distribution throughout the year) (UNWTO)	M	EUSTAT
	Percentage of annual tourist arrivals occurring in peak month, in peak quarter (UNWTO)	M	EUSTAT
	Ratio of number of tourists in peak month to lowest month (UNWTO)	A	EUSTAT
	Occupancy rates for accommodation by month or quarter (distribution throughout the year) (UNWTO)	M	EUSTAT
Strengthen shoulder season and low season tourism	Percentage of tourism authority budget spent promoting off-peak and shoulder seasons (UNWTO)	NA	-
	Number of facilities offering alternative activities during shoulder and low season (capacity and use levels per activity type) (UNWTO)	A	
	Percentage of main attractions open in shoulder/off-seasons (UNWTO)	A	
	Special events held during peak, shoulder and off-seasons (number of events, participants) (UNWTO)	A	Bilbao Convention Bureau, Biscay Provincial Council
Provision of sufficient infrastructure, services and products year-round	Percentage of accommodation and tourism-related services open all year (UNWTO)	M	
	Percentage of tourism-related employment which is full-year, less than six months etc. (UNWTO)	NA	-
	Local unemployment rate in low, off, shoulder and peak seasons (UNWTO)	M	SEPE
	Percentage of annual tourist arrivals occurring in peak month, in peak quarter (UNWTO)	M	EUSTAT

Component of the issue	Indicators	Monitoring & Availability	Source
	Ratio of number of tourists in peak month to lowest month (UNWTO)	A	EUSTAT

4.1.5. Energy management & Climate Change

Component of the issue	Indicators	Monitoring & Availability	Source
Climate change mitigation measures	Percentage of tourism enterprises involved in climate change mitigation/energy conservation schemes/programs - such as CO2 offset, low energy systems etc. (ETIS,UNWTO)	M	Basquetour
	Program and incentives assisting tourism enterprises to monitor, reduce and publicly report energy consumption and greenhouse gas emissions (GSTC)	A	Basque Government, Ithobe
	Program and incentives assisting tourism enterprises to monitor, improve and publicly report energy conservation and energy efficiency (GSTC)	A	Basque Government, Biscay Provincial Council
	Program and incentives assisting tourism enterprises to reduce reliance on fossil fuels and use renewable energy technologies (GSTC)	A	Basque Government, Biscay Provincial Council
Energy consumption	Energy consumption per tourist night compared to general population energy consumption per resident night (ETIS, UNWTO)	M	EVE
	Percentage of tourism enterprises taking actions to reduce/save energy consumption (ETIS, UNWTO)	NA	-
	Percentage of the annual amount of energy consumed from renewable resources (Mwh) compared to overall energy consumption at destination level per year (ETIS)	M	REE
	Use of renewable energy sources at tourism enterprises	A	EUSTAT

4.1.6. Water Management

Component of the issue	Indicators	Monitoring & Availability	Source
Overall water use relative to supply	Water use (total consumed and liter per tourist per day)	A	URA
Water use/ water consumption	Water consumption per tourist night compared to general population water consumption per resident night (ETIS)	M	URA
	Total volume consumed and litres per tourist per day (UNWTO)	A	URA
	Percentage of tourism enterprises taking action to reduce water consumption (ETIS)	NA	-
	Percentage of tourism enterprises using recycled water (ETIS)	NA	-
	Percentage of water saved (reduced, recaptured or recycled) (UNWTO)	NA	-
	Total water used by each sector (tourism as a percentage of all user sectors) (UNWTO)	M	EUSTAT
	Program assisting tourism enterprises to measure, monitor, reduce and publicly report water usage (GSTC)	NA	-
Water Security	Management system ensuring that water use by tourism enterprises and requirements of the communities in the destination are balanced and compatible (GSTC)	NA	-
Water Quality	Management system to monitor and publicly report on drinking and recreational water quality (monitoring results are publicly available and the system responds in a timely manner to water quality issues) (GSTC)	M	Biscay Provincial Council
Seasonal shortage, water shortages	Number of shortage incidents per year	M	Basque Government , Ihobe
	Number of days of supply shortage per year % of loss	M	Basque Government , Ihobe
Cost and pricing of water	Water price per litre or cubic meter	M	Water Consortium

4.1.7. Wastewater Management

Component of the issue	Indicators	Monitoring & Availability	Source
Sewage treatment systems	Percentage of sewage from the destination treated to at least secondary level prior to discharge (ETIS)	M	EUSTAT
	Percentage of sewage from key sites which receives treatment to meet standards (UNWTO)	A	Basque Government
	Percentage of tourism establishments on suitable treatment systems (UNWTO)	A	Basque Government
	Number of reported pollution or contamination events per annum in watercourses receiving effluents (UNWTO)	A	URA
Wastewater	Regulations for the siting, maintenance, and testing of discharge from septic tanks and wastewater treatment systems, and evidence of their enforcement (GSTC)	A	Basque Government, Biscay Provincial Council
	Regulations to ensure that size and type of wastewater treatment is adequate for the location, and evidence of their enforcement (GSTC)	A	Basque Government, Biscay Provincial Council
	Program to assist tourism enterprises to properly treat and safely reuse wastewater with minimal adverse effects to the local population and environment (GSTC)	NA	-

4.1.8. Solid Waste Management

Component of the issue	Indicators	Monitoring & Availability	Source
Solid waste management	Waste production per tourist night compared to general population waste production per person (kg) (ETIS)	M	Basque Government, Ihobe
	Percentage of tourism enterprises separating different types of waste (ETIS) (UNWTO)	NA	-
	Percentage of total waste recycled per tourist compared to total waste recycled per resident per year (ETIS)	NA	-
Solid waste reduction	Waste volume produced by the destination (tons), percentage of waste attributable to tourism (UNWTO)	M	EUSTAT
	Volume of waste recycled (m ³)/total volume of waste (specified by different types) (UNWTO)	M	EUSTAT

Component of the issue	Indicators	Monitoring & Availability	Source
	Number of tourism establishments recycling their own waste (UNWTO)	NA	-
	Volume of hazardous substances in use (volume of use over time), attributable to tourism (UNWTO)	NA	-
	Waste collection system that maintains public records on the amount of waste generated (GSTC)	M	EUSTAT
	Solid waste management plan that is implemented and has quantitative goals to minimize and ensure safe disposal of waste (GSTC)	A	Basque Government
	Program assisting tourism enterprises to reduce, reuse and recycle waste (GSTC)	A	Basque Government, Biscay Provincial Council
	Program reducing the use of bottled water by tourism enterprises and visitors (GSTC)	A	Basque Government, Biscay Provincial Council
Maintaining a clean image for the destination	Quantity of waste strewn in public (garbage counts) (UNWTO)	NA	-
	Visitor and local perception of the level of litter attributable to tourism (questionnaire-based) (UNWTO)	NA	-
	Image of the cleanliness of destination (questionnaire-based) (UNWTO)	NA	-

4.1.9. Governance

Component of the issue	Indicators	Monitoring & Availability	Source
Strategic planning and implementation	Existence of up-to-date multi-year tourism destination strategy with a focus on sustainability, including environmental, social, cultural and economic actions (UNWTO) (GSTC) (Guidebook STGD)	A	Basque Government, Biscay Provincial Council
	Degree of stakeholder participation in the process of developing and implementing the plan (e.g. numbers involved in advisory panels, working groups etc.) (UNWTO)	A	Basque Government, Biscay Provincial Council
	Percentage of actions of the sustainable tourism plan/strategy implemented (UNWTO)	A	Basque Government, Biscay

Component of the issue	Indicators	Monitoring & Availability	Source
			Provincial Council
	Number of individuals within the destination management organization (DMO) with assigned responsibilities for sustainable tourism (GSTC)	A	Basque Government, Biscay Provincial Council
	Existence of a sustainable development officer or team, which is anchored in the organizational chart of the DMO (Guidebook STGD)	A	Basque Government, Biscay Provincial Council
	Existence of a system implemented by the destination that encourages public participation in destination planning and decision making on an ongoing basis (GSTC)	A	Basque Government, Biscay Provincial Council
	Existence of public meeting(s) held by the destination to discuss destination management issues each year (GSTC)	A	Basque Government, Biscay Provincial Council
Environmental and social impact monitoring	Existence of a system for identifying environmental risks related to tourist activities. Existence of measures to reduce environmental risks. (Guidebook STDG)	NA	-
	Percentage of tourism-related businesses in the destination that have completed an Environmental Impact Assessment (UNWTO)	M	Basquetour
Sustainability certification schemes and quality awards	Number (percentage) of tourism enterprises and establishments in the destination (e.g., hotels, tour operators, sub-destinations) using a voluntary sustainability, environmental or corporate social responsibility certification/label (ETIS) (UNWTO) (Guidebook STDG)	M	Basque Government, Biscay Provincial Council
	Number of tourism businesses in the destination that have environmental or sustainable development certification. Number of tourism businesses with a quality distinction/award (Guidebook STGD)	A	Basque Government, Biscay Provincial Council
	Number (percentage) of tourism businesses with an accessibility label, indicating that sites and attractions can be accessed by people with disabilities or by others with specific access requirements (Guidebook STGD)	NA	-
	Existence of a system for evaluating tourism businesses and services with regard to their sustainable development performance (Guidebook STGD)	NA	-

Component of the issue	Indicators	Monitoring & Availability	Source
	Number/percentage of tourist services verified as sustainable by the DMO according to the evaluation system (Guidebook STGD)	NA	-
	Publicly available list of sustainably certified or verified enterprises (GSTC)	NA	-
Branding, image and ranking of the destination	Percentage of tourists having visited the destination who have a positive image of the destination and who would recommend the destination to their peers (UNWTO)	M	Biscay Provincial Council
	Percentage of visitors satisfied with their experience and who agree that the reality matched what was advertised (survey-based) (UNWTO)	M	Biscay Provincial Council
	Rank of the destination on list with other destinations (image by those who have not visited the destination) (UNWTO)	M	Biscay Provincial Council
	Percentage of residents perceiving the destination's brand and promotional messages to positively and respectfully reflect their authentic and preferred attributes and values (survey-based) (UNWTO)	NA	-
	Percentage of the audience which perceives that the destinations promotional messages authentically and respectfully reflect the preferred attributes and values (UNWTO)	NA	-
	Percentage of destination promotional messages that represent local communities and visitors authentically and respectfully. Existence of destination promotional messages that are accurate in their description of products and services (GSTC)	M	Biscay Provincial Council
	Percentage of visitors who believe the brand values, attributes and benefits communicated were met during their trip and who expect to return to the destination (survey-based) (UNWTO)	M	Biscay Provincial Council
	The DMO promotes typical local and regional products and services (Guidebook STGD)	A	Biscay Provincial Council
	Number of communication materials promoting regional products and service providers (Guidebook STGD)	A	Basque Government, Biscay Provincial Council
	Information and awareness building on sustainable tourism	Existence of program(s) provided by the destination in communities, schools and higher education institutions to enhance awareness and understanding of sustainable tourism (GSTC)	NA

Component of the issue	Indicators	Monitoring & Availability	Source
	The destination has an up-to-date, publicly available inventory and classification of its tourism assets and attractions, including natural and cultural sites (GSTC)	A	Biscay Provincial Council
	Number of places (communication tools) in the destination that provide information to the residents and visitors on sustainable tourism objectives, actions, projects and initiatives of the destination (UNWTO) (Guidebook STGD)	A	Biscay Provincial Council
	Percentage of residents that have a clear understanding of what sustainable tourism means and of the role of sustainable tourism planning, management and monitoring (survey-based) (UNWTO)	NA	-
	Percentage of visitors that are aware of the objectives, activities, projects and initiatives of the destination with regard to sustainable tourism (Guidebook STGD)	A	Biscay Provincial Council
Public support of tourism development	Amount and percentage of public authority budget designated for supporting tourism-related development (UNWTO)	A	Basque Government, Biscay Provincial Council
	Total number of civil servants working on tourism activities in the destination	A	Basque Government, Biscay Provincial Council
	Global touristic related activities budget of all public sector	A	Basque Government, Biscay Provincial Council
Assessment and participation in the public management of tourism in Biscay	Assessment of the management carried out by the Provincial Council of Biscay	M	Biscay Provincial Council
	Priority actions to boost the sector	M	Biscay Provincial Council
	Knowledge of the Voucher Programme	M	Biscay Provincial Council
	Knowledge of the Bilbao Bizkaia Booking Centre	M	Biscay Provincial Council
	Interest in participating in the definition of the future of the tourism sector.	M	Biscay Provincial Council
Institutional management of tourism in Biscay	Institution responsible for tourism in Biscay	M	Biscay Provincial Council

Component of the issue	Indicators	Monitoring & Availability	Source
	Institution that should manage tourism in Biscay	M	Biscay Provincial Council
	Management of tourism by the Provincial Council of Biscay	M	Biscay Provincial Council
	Informative visit to the Tourist Office in your locality	M	Biscay Provincial Council

4.1.10. Accessibility

Component of the issue	Indicators	Monitoring & Availability	Source
Access for all, low barrier tourism	Existence of accessibility policies	A	Basque Government , Biscay Provincial Council
	Existence of accessibility programmes	A	Basque Government , Biscay Provincial Council
	Existence of public transport adapted to Mobility problems/restrictions	A	Basque Government , Biscay Provincial Council
	Number of tourism companies in the destination offering tourist guides prepared for people with disabilities	A	Biscay Provincial Council
Accessibility in public buildings, hotels and tourism services	Restaurants, hotels and public Buildings with accessible WC and Wheelchairs	A	Biscay Provincial Council
	Number and percentage of hotels with accessible rooms for people with disabilities	M	Biscay Provincial Council
Accessibility of Tourist attractions and cultural and natural sites.	Percentage of Tourist attractions accessible with wheelchair	NA	-
	Percentage of tourist attractions that offer and alternative Access for people with mobility impairments	NA	-
Assistance when needed	Distance to hospitals and care centres in the region	A	Basque Government , Biscay Provincial Council

Component of the issue	Indicators	Monitoring & Availability	Source
Satisfaction of people with mobility impairments, with the destination and its attractions	Survey to the departing tourists	M	Biscay Provincial Council, INE
Satisfaction, wellbeing and behaviour of visitors	Tourism accessibility to Mobility (including silver tourists and people with disabilities) with special attention to accessible public transport (barrier free)	NA	-
	Alignment of the infrastructure linked to public and private tourism with the barrier free concepts	A	Basque Government , Biscay Provincial Council
Satisfaction, wellbeing and behaviour of visitors	Barrier free planning for buildings linked to tourism with approval procedures	M	Biscay Provincial Council
	Barrier free tourism attractions	M	Biscay Provincial Council
	Tourist access to health services	NA	-
	Tourism security	NA	-
	Variety of tourism experiences (diversification of products, services range, travel circuits, routes)	M	Biscay Provincial Council
	Adaptation of the products' portfolio to the increasing number of consumers (friendly services, adapted to each age)	NA	-
	Satisfaction by those with mobility challenges with the destination and attractions	NA	-
Access for all, low barrier tourism	Existence of policies (guidelines, regulations, etc.) supporting access to tourist sites and facilities for individuals with specific access requirements (including public transport, accommodation establishments, natural and cultural sites) (GSTC)	A	Basque Government , Biscay Provincial Council
	Number of rooms in commercial accommodation accessible for people with disabilities (ETIS) (UNWTO)	A	Basque Government , Biscay Provincial Council
	Percentage of accommodation establishments participating in recognized accessibility information schemes (ETIS)	NA	-
	Percentage of public transport that is accessible to people with disabilities and specific access requirements (ETIS) (UNWTO)	A	Basque Government , Biscay Provincial Council

Component of the issue	Indicators	Monitoring & Availability	Source
	Percentage of tourist attractions that are accessible to people with disabilities and/or participating in recognized accessibility information schemes (ETIS) (UNWTO)	NA	-
Access to public buildings, hotels and tourist services	<ul style="list-style-type: none"> Number and % of hotels with rooms accessible to people with disabilities 	A	Basque Government , Biscay Provincial Council
	<ul style="list-style-type: none"> Restaurants, hotels and public buildings with wheelchair-accessible restrooms 	A	Basque Government , Biscay Provincial Council
Access to tourist attractions, including natural and cultural sites	<ul style="list-style-type: none"> Percentage of attractions with wheelchair access 	A	Basque Government , Biscay Provincial Council
	<ul style="list-style-type: none"> Percentage of attractions offering alternative access for those with mobility concerns 	A	Basque Government , Biscay Provincial Council
Assistance when needed	Distance to hospitals in the region or medical facility	A	Basque Government , Biscay Provincial Council





4.2. Additional indicators measured by BTIS

The following topics are measured by BTIS and are beyond the scope of UNWTO INSTO issue areas.

4.2.1. Tourism Satellite Account

EUSTAT, the Basque Statistics Office, uses TSA to measure tourism in the economy of the Basque Country as a whole (the Basque Country includes three provinces: Biscay, Gipuzkoa and Álava). The TSA is done every 5 years and it is updated every year. The aim of the TSA is to:

- Obtain the main macro magnitudes of the tourism sector and their interrelationships following the methodological principles of the Economic Accounts.
- Analyse the tourism sector as an economic sector and to analyse its impact on the Basque economy.

The table below shows TSA data from the last 3 years. It is also relevant to state that the BTIS monitors this data in its annual report.

Table 10 Contribution of tourism in Biscay to the Basque economy by value, and period.

	2018	2019	2020
Tourism Expenditure Level (000s €)	2.196.957	2.263.742	1.230.443
Tourism expenditure in %	44,9%	44,5%	42,8%
% GDP	5,7%	5,6%	3,4%

As it can be seen in the table, 2020's tourism contribution to the GDP reflects the impact of the COVID-19 pandemic.

4.2.2. Tourism Business Profile and Activity

Component of the issue	Indicators	Monitoring & Availability	Source
Business profile	Starting year of the activity (average/%)	M	BTIS
Business profile	Characteristics of the companies' workforce (average)	M	BTIS
Business profile	Size of enterprises	M	BTIS
Business profile	Distribution of the number of persons employed according to area of the enterprise and gender (average)	M	BTIS
Business Activity	Weight of tourism in the activity of the enterprise	M	BTIS
Business Activity	Months of greatest activity of the company (seasonality)	M	BTIS
Business Activity	Distribution of turnover 2021 by market	M	BTIS
Business Activity	Changes in turnover by market in 2021 and 2022 compared to 2020	M	BTIS
Business Activity	Type of client	M	BTIS
Business Activity	Marketing channels of its products/services	M	BTIS
Business Activity	Innovative activities developed in the last 3 years and types of innovation	M	BTIS
Business Activity	Existence of a relationship and/or collaboration agreement with other companies in the tourism industry sector.	M	BTIS
Business Activity	Assessment of the relationship/collaboration between companies in the industry in Biscay	M	BTIS

4.2.3. Tourists and Same-Day visitors' profile

Component of the issue	Indicators	Monitoring & Availability	Source
Sociodemographic profile	Type of same day visitor	M	BTIS
Sociodemographic profile	Origin/Usual residence	M	BTIS
Sociodemographic profile	Usual residence according to typology	M	BTIS
Sociodemographic profile	Social form of travel according to typologies	M	BTIS
Sociodemographic profile	Gender and age groups	M	BTIS
Sociodemographic profile	Occupational status according to typologies	M	BTIS
Sociodemographic profile	Income level according to typologies	M	BTIS
Type of accommodation	Type of accommodation chosen	M	BTIS
Type of accommodation	Number of accommodations during your stay	M	BTIS
Type of accommodation	Same establishment chosen or not in other visit/s to the destination	M	BTIS
Type of accommodation	Reasons for choosing the type of accommodation	M	BTIS



4.2.4. COVID-19 impact

Component of the issue	Indicators	Monitoring & Availability	Source
Covid 19	Biscay as the main destination in the context of COVID-19 (%)	M	BTIS
Covid 19	Impact of COVID-19 on travel plans (multiple response)	M	BTIS
Covid 19	Impact of COVID-19 on travel behaviour (multiple response)	M	BTIS
IMPACT OF COVID-19 AND MEASURES IMPLEMENTED BY COMPANIES	Measures adopted to keep the business active	M	BTIS
Travel habits of residents in bizkaia in a post-covid-19 scenario	Impact of COVID-19 on travel plans	M	BTIS
Travel habits of residents in bizkaia in a post-covid-19 scenario	Impact of COVID-19 on travel habits	M	BTIS
Travel habits of residents in bizkaia in a post-covid-19 scenario	Change of usual travel destination	M	BTIS

4.2.5. Visitor experience

Component of the issue	Indicators	Monitoring & Availability	Source
Experience in Biscay	Information media used	M	BTIS
Experience in Biscay	Internet as a tool	M	BTIS
Experience in Biscay	Websites consulted	M	BTIS
Experience in Biscay	Main reason for visiting Biscay	M	BTIS
Experience in Biscay	First visit to Biscay according to typologies	M	BTIS
Experience in Biscay	Number of visits to Biscay in the last 5 years according to typologies	M	BTIS
Experience in Biscay	Main Means of Information for choosing Biscay as a destination	M	BTIS
Experience in Biscay	Reflexivity in the visit to Biscay (degree of anticipation of the decision)	M	BTIS
Experience in Biscay	Influence of the weather on the visit to Biscay according to typologies	M	BTIS

Component of the issue	Indicators	Monitoring & Availability	Source
Experience in Biscay	Issues to bear in mind when visiting Biscay	M	BTIS
Experience in Biscay	Impact of overcrowding on the choice of destination	M	BTIS
Experience in Biscay	Means of transport used	M	BTIS
Experience in Biscay	Average length of stay	M	BTIS
Experience in Biscay	Activities carried out during your stay	M	BTIS
Experience in Biscay	Number of regions visited during your stay in Biscay	M	BTIS
Experience in Biscay	Places of tourism interest visited in Biscay	M	BTIS
Experience in Biscay	Time of finding out about places of interest to visit in Biscay	M	BTIS
Experience in Biscay	Sources of information used	M	BTIS

4.2.6. Future of Tourism in Biscay

Component of the issue	Indicators	Monitoring & Availability	Source
Future of Tourism in Biscay	Lines for the future development of tourism in Bizkaia	M	BTIS
Future of Tourism in Biscay	Willingness to work in the tourism sector	M	BTIS
PROSPECTION OF THE TOURISM INDUSTRY SECTOR IN BISCAY	Forecast growth as a company over the next 3 years	M	BTIS
PROSPECTION OF THE TOURISM INDUSTRY SECTOR IN BISCAY	Risk to the continuity of the business and alternatives considered	M	BTIS
PROSPECTION OF THE TOURISM INDUSTRY SECTOR IN BISCAY	Forecast turnover 2020-2021-2022	M	BTIS
PROSPECTION OF THE TOURISM INDUSTRY SECTOR IN BISCAY	Forecast workforce 2020-2021-2022	M	BTIS
PROSPECTION OF THE TOURISM INDUSTRY SECTOR IN BISCAY	Forecast of marketing channels 2020-2021-2022	M	BTIS
PROSPECTION OF THE TOURISM INDUSTRY SECTOR IN BISCAY	Forecast in 1 year	M	BTIS

Component of the issue	Indicators	Monitoring & Availability	Source
PROSPECTION OF THE TOURISM INDUSTRY SECTOR IN BISCAY	Identification of obstacles to growth	M	BTIS
PROSPECTION OF THE TOURISM INDUSTRY SECTOR IN BISCAY	Forecast of major changes in demand	M	BTIS



5. Bilbao Bizkaia Tourism Strategy 2030

Biscay Tourism Intelligence System is nowadays in the process of being strengthened, within the framework of the new Biscay's Tourism Strategy 2030, which has been recently presented (10th February 2022) and which provides a new strategic long-term vision for the BTIS in line with managing flows and further developing towards a tourism intelligence system.

The strategy is the result of a broad participatory process that has involved more than 250 public and private agents from the tourism sector in the territory, articulated via BBAG, whose contributions have made it possible to outline the common framework for work in the field of tourism for the 2030 horizon. It incorporates numerous proposals and initiatives that have arisen within the working groups on multiple themes. There have been workshops, thematic events, personal interviews, and participation forms from which numerous tools have been deployed to achieve a shared strategy that reflects the sector's enthusiasm for building a more attractive and better positioned destination. The strategy has also been developed by considering the data monitored within the BTIS, which reinforces the idea that BTIS monitors and measures for the tourism agents of the destination, both private and public ones, in order to promote the wellbeing in the destination. In this sense, the strategy also proposes a firm commitment as a monitoring model, in the measurement and evaluation of the strategy itself under indicators linked to the Sustainable Development Goals. This monitoring will allow the permanent alignment to the global principles of sustainability, allowing Bilbao Bizkaia to evaluate and be accountable for the level of contribution expected from the destination in terms of the SDGs.

5.1. 2030 Vision

The strategy's 2030 VISION pivots in 3 elemental principles:

1. International benchmark

Bilbao Bizkaia is positioned as an international benchmark on the Atlantic axis, unique for its own identity, diversity and capacity for transformation.

2. Sustainable development

Bilbao Bizkaia is committed to the sustainable development of tourism, promoting territorial balance and the well-being of people through a cooperative tourism ecosystem.

3. Engine of attraction

Bilbao Bizkaia aspires to be an engine of attraction for visitors and talent, generating socio-economic impact throughout the territory.

This **VISION** includes 7 strategic objectives and 6 action principles.

7 Strategic Objectives

1. Generate socioeconomic impact in a sustainable manner.
2. Improve the competitiveness of the business fabric.
3. Attract visitors and develop the destination in a balanced and sustainable manner.
4. Consolidate international positioning and reinforce the destination's image.
5. Improve the experience and satisfaction of all people.
6. Digitally transform the destination.
7. **Strengthen the ecosystem and the tourism intelligence model.**

6 Action Principles

1. Cooperation.
2. Orientation towards the people's experience.
3. Equality and diversity.
4. Responsibility and sustainability.
5. Digitalization and **tourism intelligence**.
6. Innovation and creativity.



5.2. Conceptual Framework

In addition, the **conceptual framework** of the new strategy places people at the centre of its actions.



Figure 9 Conceptual Framework, Bilbao Bizkaia Tourism Strategy 2030.

The priority of the destination's actions is to guarantee wellbeing, satisfaction, and a pleasant tourism experience for the entire tourism value chain. The destination applies the principles of social, environmental, and economic sustainability to promote balanced tourism development, to promote the generation of wealth and employment, cultural exchange, visitor satisfaction and happiness at the destination. **Sustainability, digitalisation, and innovation** are identified as levers of change to respond to the challenges facing the destination. It also reinforces the existing model of governance of Bilbao Bizkaia's tourism sector by broadening the agents involved in development and in the industry and maintaining the active listening of Bizkaia's citizens and the opinion of tourists and same day visitors. The new strategy has assumed an unavoidable commitment to sustainability, which is defined under **three strategic axes**:

Development, Marketing and Governance

Structured on the basis of **two scenarios: recovery and transformation**, which proposes a framework for action that includes 19 strategic lines associated with the Sustainable Development Goals.

5.3. Strategic lines



Figure 10 Lines of action, Bilbao Bizkaia Tourism Strategy 2030.

It is worth highlighting 5 of the 19 lines of action of the new strategy as they impact directly or indirectly on the BTIS and are fully aligned with the commitment of Bizkaia's application to be part of the International Network of Sustainable Tourism Observatories:

Line 4. Monitoring and evaluation of the tourism sector's recovery.

This line focuses on measuring the impact of the pandemic and to continuously monitor the economic recovery on both supply and demand side. The line also implies the identification of other destination's best practices.

Line 9. Encouraging territorial balance through tourism.

This line reinforces what the BTIS has been working on since 2019, it aims to distribute tourism flows throughout the territory, balancing geographical and territorial distribution. The actions to be taken in this sense are:

- Collaboration for the promotion of the structuring axes.
- Promoting the strategy of tourist corridors.
- Promotion of tourism throughout the territory through tourist products and same day visitor.
- Design of thematic routes linked to tourism products.

Line 10. Supporting business competitiveness and entrepreneurship.

Boosting the competitiveness of tourism companies in Bilbao Bizkaia and supporting their digitalisation and innovation processes and tourism entrepreneurship.

- Development of services for companies to improve their competitiveness.
- Support for tourism entrepreneurship.

Line 11. Incorporation of technological tools and solutions

Facilitate efficient adoption of technologies for personalised visitor attention throughout the travel cycle and intelligent management. Development of services for companies to improve their competitiveness.

- Development and implementation of an advanced technological platform for the management of tourism flows at the destination.
- Development of a digital marketing strategy based on market intelligence.

- Digitalisation of the main tourist resources.

Line 12. Development of a responsible ecosystem.

This line is of great importance for the BTIS to move forward with measuring sustainability, it aims to encourage the promotion of sustainability, through the formulation of responsible tourism guidelines for the Bilbao Bizkaia ecosystem.

- Promoting sustainability through the behaviour and commitment of the tourism industry.
- Development of marketing actions to raise visitor awareness in the field of sustainability.
- Introduction of the SDGs in the destination's governance and tourism intelligence system.
- Monitoring the environmental and social sustainability of tourism areas.
- Promotion of social innovation linked to tourism sustainability.



6. Bilbao Bizkaia Governance System

Bizkaia Provincial Council, counts with a Department of Economic Promotion, within it there are two departments as seen in the figure below. Directorate-General for Territorial Competitiveness and Tourism embodies the tourism department which is in charge of the **open governance model** operatively implemented via the **Bilbao Bizkaia Action Group (BBAG)** and sustains and develops the Bizkaia Tourism Information System (BTIS).

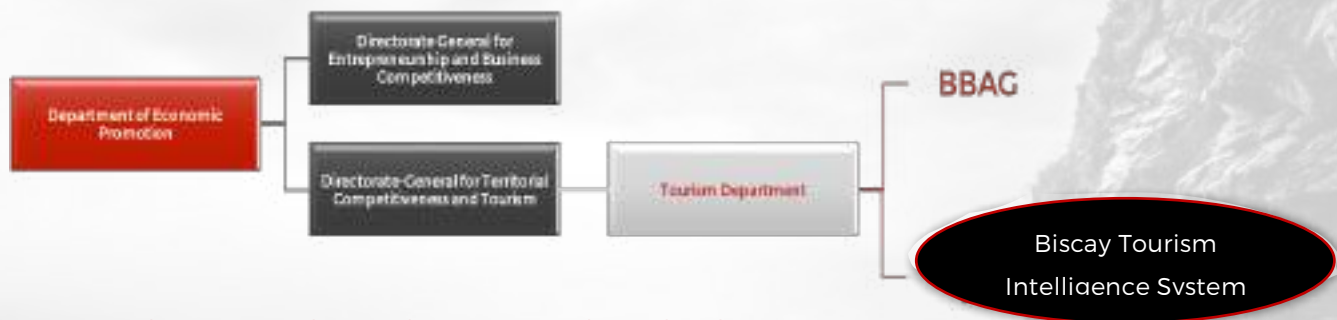


Figure 11 Bilbao Bizkaia Provincial Council organisation chart related to tourism

The open governance model is regulated by the Foral Decree 106/2018, of July 24th. This decree regulates the aims, members, roles and responsibilities of the Bilbao Bizkaia Action Group and the working groups therein.

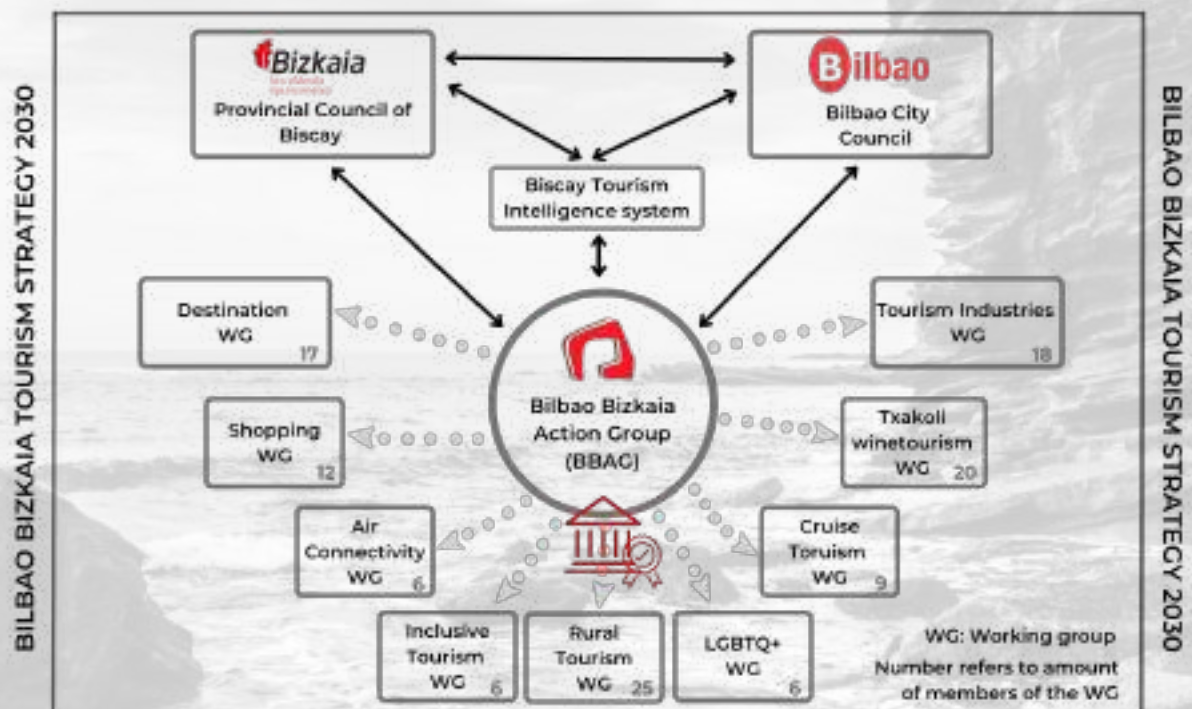


Figure 12 Open governance model implemented to Manage Tourism within Bilbao Bizkaia destination

Operationally this model works as follows:

- BBAG is chaired by the Directorate-General for Territorial Competitiveness and Tourism;

Biscay Tourism Intelligence System candidacy to UNWTO INSTO Network

- BBAG has a technical secretariat that makes sure that there are no overlapping, that information and communication flows within the WGs, among them and also with other entities.
- There is a conceptual framework provided by the strategy that has been developed by intensive participation of all the BBAG members and working group members. This applies to the new 2030 strategy and to the previous one, given that for both wide participation and consensus was sought after;
- Each working group have topics around which they are to work on to improve in competitiveness, sustainability, inclusiveness, digitalization, etc.;
- The Destination Working Group and the Tourism Industries Working Group are more horizontally across groups, since therein any topics can be brought in that then might be touching upon topics that some WG might be more specifically be working on. In this case the technical secretariat will organize a joint meeting of the destination WG with the concerned specific WGs.

The following figure shows an example of how the open governance model works.

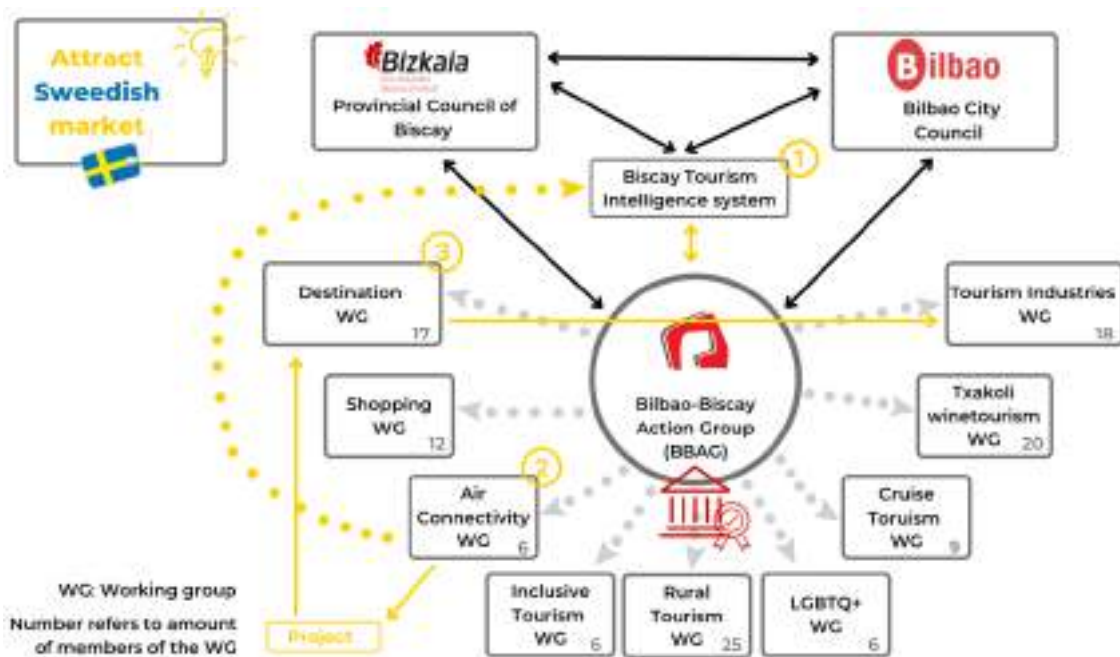


Figure 13 Example of the open governance model of Bilbao Bizkaia Action Group

The example supposes that the new strategy establishes that the Swedish market has been defined as a relevant market for growth for Bilbao Bizkaia. Hence the Air Connectivity WG and the Destination WG jointly request to BTIS information available on that market to develop projects to attract that market. Moreover, these working groups involve the Tourism Industries WG so that companies can learn, at the light of the BTIS data, which kind of motivations, products/services this market is mostly interested in, when do they travel, with whom, how, etc. This way the Air Connectivity

WG can negotiate with airlines better frequency, the Destination WG can develop marketing actions, and Tourism Industries WG, for the companies interested in this market, can work on review if there are products and services key to be highlighted on those marketing actions.

Regarding how this governance works with BTIS, the Directorate-General for Territorial Competitiveness and Tourism manages all the activities that are developed within the framework of the BTIS. The tourism technical team from the city of Bilbao is also involved in the activity of the BTIS, along with the team hired by the BTIS to produce reports using secondary and primary data. All these agents hold meetings every two weeks to discuss results and to further improve data collection and use. Every month the technical secretariat of BBAG or the Directorate General or the Bilbao Tourism team bring in requests by BBAG working groups. The requests are of the following kinds:

- Data requests;
- Report requests;
- Requesting working sessions to discuss a project they want to embark on and they want BTIS input;
- Requesting working sessions to further understand data and the methodology behind it to better use it;
- Requesting ad hoc research.

It is a full community of tourism agents working together and the BTIS is an instrument that supports the process so that decisions can be made based on reliable data, to the extent that this data is available.





6.1. Bilbao Bizkaia Action Group members



It should be clarified that Bizkaia Provincial Council will not be mentioned since it is the entity chairing all working groups.

6.1.1. Destinations Working Group



**BILBAO
BIZKAIA**

Bilbao City Council - Bilbao Tourism - The Tourism and Commerce Department aims to promote tourism and its industry in Bilbao, while contributing to improving the competitiveness of the commercial sector, both as catalysts for the generation of wealth and employment in the city.

We promote tourism in the city and attend to the people who visit us, with the aim of increasing its weight in the local economy and employment. At the same time, we are committed to trade as a catalyst for economic activity in the city. This is an area of work in which we focus our efforts on supporting the sector in the face of the challenge of innovation and changes in consumption models through projects and programmes or actions to stimulate commerce.

visit enkarterri

Bilbao | Bizkaia | Euskadi

The Encartaciones Tourism Association - ENKARTUR was set up in Balmaseda with the aim of carrying out all kinds of promotional and study activities aimed at giving greater tourist and economic projection to the geographical area of Las Encartaciones, defined as a social and economic reality. Founded in November 1999, the Encartaciones Tourism Association, ENKARTUR, is made up of public institutions, as well as companies, individuals and cultural and sports associations, thus bringing together the different social spheres of the geographical area of Encartaciones.

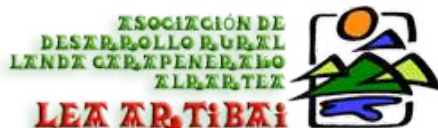
Gorbeialdea

Gorbeialde is a non-profit association whose purpose is to promote the socioeconomic development of the Arratia-Nerbión region. This association, which has been active for more than 20 years, was created with the conviction that it was necessary to work for the maintenance of the primary sector as the main asset of the rural economy. Today rural development encompasses other areas than the purely agrarian. Rural development is therefore that effort aimed at improving the quality of life of the inhabitants of these geographical areas.

The Urkiola Rural Development Association is an association that works to promote rural development projects in Durango and make the social fabric sensitive to rural development activities.

Durangaldea

Its activity is to establish agreements with public administrations and liaise with other Rural Development organizations to carry out projects.



The Lea-Artibai Rural Development Association operates mainly in the Lea-Artibai region of Bizkaia, covering the municipalities of Amoroto, Aulestia, Berriatua, Etxebarria, Gizaburuaga, Ispaster, Lekeitio, Markina-Xemein, Mendexa, Munitibar-Arbatzegi-Gerrikaitz, Ondarroa and ziortza-Bolibar.

The aims of the Rural Development Associations are to achieve the general and sectoral objectives set out in Law 10/1998 of 8 April, on Rural Development.

Jata-Ondo is the Association for Rural Development (A.D.R.) which is responsible for the development of the rural areas of the Uribe region,



working in different areas such as land management, agriculture and forestry, health, environment and tourism, among others. To this end, it has set up various projects and programmes that facilitate the achievement of the objectives set for the region, as well as being the collaborating entity, and therefore recognised, for the management of aid for rural development in the region of Uribe.



Urremendi is a Rural Development association whose sole objective is to promote the development of the region of Busturialdea, which is understood to include the municipalities of Ajangiz, Arratzu, Bermeo, Busturia, Ea, Elantxobe, Ereño, Errigoiti, Forua, Gautegiz-Arteaga, Gernika-Lumo, Ibarangelu, Kortezubi, Mendata, Morga, Mundaka, Murueta, Muxika, Nabarniz and Sukarrieta.

Biosphere Reserve since 1984. The Urdaibai Biosphere Reserve covers 22,000 hectares and is made up of a mosaic of cliffs, mountains, beaches, rivers and subterranean waters, which offer us a spectacular



landscape full of animal and human life. With the aim, on the one hand, of harmonising the conservation of biological diversity, heritage and cultural manifestations, and on the other, economic development, as well as the relationship between people and their environment, in 1984 UNESCO included Urdaibai in its MaB programme, through its declaration as a Biosphere Reserve. As specified in the UNESCO MAB Programme, Urdaibai has a participatory body made up of representatives of the different administrations with jurisdiction over Urdaibai, as well as organisations and associations representing economic, social and environmental interests. This body is the Board of Trustees of the Urdaibai Biosphere Reserve.



Concern for the proper management of the important cultural heritage of Bizkaia has been a constant feature of the actions of the Provincial Bodies of the Historical Territory of Bizkaia.

In this sense, in 2009, the Department of Culture of the Provincial Council of Biscay resorted to collaboration with one of the most prestigious cultural consultancy entities in the world to carry out a diagnosis of the situation of the dissemination of the cultural heritage of Biscay and a proposal for future action in this field.

Thus, an analysis was made of the infrastructures aimed at disseminating the cultural heritage in Bizkaia (museum offer in the broadest sense of the term; that is, provincial entities -owned and/or shared- as well as private ones subsidised by the Provincial Institution aimed at the dissemination of Biscay's cultural heritage, avant-garde art, and even the internal structure of the Provincial Department of Culture itself as regards the management of cultural heritage), which was then sifted through a comparison of the reference management models, concluding on the need to create a common management unit for all these entities or infrastructures in Bizkaia, both from the point of view of efficiency in their management, as well as from the point of view of maximising the investment made in them by the Provincial Council of Bizkaia. Based on this context, the creation of a Management Unit in Bizkaia offered a series of very important opportunities for the DFB.

The Hotel and Catering Association of Bizkaia is a sectoral organisation that represents the business interests of the owners of the hotel and catering subsectors and their respective activities.



Asociación
de Hostelería
Bizkaia
Ostalaritzako
Elkartea

A significant part of the membership is represented by what are commonly known as self-employed workers who, in turn, are owners of companies in the SME and micro-enterprise sector.



Basquetour is the public company of the Ministry for Tourism, Trade and Consumer of the Basque Government, created in 2006 to head the promotion and implementation of the strategy for

competitiveness established for the Basque Country, defined nowadays in the "Strategic Plan for Basque Tourism, 2020", in conjunction with the public and private organisations which make up the tourism industry in the Basque Country and according to the "Responsible Tourism Strategy of the Basque Country".

Objectives:

Biscay Tourism Intelligence System candidacy to UNWTO INSTO Network

- To improve the competitiveness of tourism as an economic activity which generates wealth and employment.
- To improve the position of the Basque Country in strategic segments.
- To consolidate the Basque Country brand as a tourist destination in emerging markets.
- Adaptation of the offer and development of Basque tourism products through management and issues promotion to the different market segments.
- Monitoring of the destination "Basque Country" through analysis and studies for its correct management.



The tourism area within Orduña city council responsible for sustainable development of tourism in the municipality.



The tourism area within Getxo town council responsible for sustainable development of tourism in the municipality.



The tourism area within Santurtzi town council responsible for sustainable development of tourism in the municipality.



The tourism area within Portugalete town council responsible for sustainable development of tourism in the municipality.



The tourism area within Barakaldo town council responsible for sustainable development of tourism in the municipality.



The University of Deusto within its Faculty of Social and Human Sciences for more than 50 years has been offering the BA on Tourism.

The University of Deusto was founded in 1886 by the Society of Jesus. Its birth coincided with the cultural concerns and interests of both the Basque Country to have its own university and the Society of Jesus to establish higher education in some part of Spain. Bilbao, a port and commercial city that was experiencing considerable industrial growth at the time, was chosen. Bilbao is the centre of a metropolitan area with more than a million inhabitants, a city traditionally open to Europe.

Beyond individual research and those coordinated from chairs such as Law and the Human Genome or Leisure and Disabilities, there is, at the institutional level, a clear option for social issues of interdependence, distribution of resources, migrations, human rights, development, poverty and the environment, ethics and society, as well as studies on cultural identity (individual and collective) and European integration processes, taking part in several international research groups.

Internationalisation, without excluding other regions, shows a clear commitment to Europe and Latin America, having signed agreements with more than 200 universities.

6.1.2. Tourism Industries Working Group



ATRAE is the joint venture of the most important receptive agencies of the entire Basque Country.

At the end of 2014 we created the association ATRAE with a total of 20 agencies throughout the Basque territory with some very clear ends:

- To contribute to defending and promoting the economic and social interests inherent in the activity of its Associates.
- To contribute to the promotion and development of the Basque Country as a tourist destination for Package Tours.
- To promote professionalisation and improvement of the Basque Tourism Sector and mainly that referring to Receptive Travel Agencies and existing tourist elements.
- To be a channel for the Basque Receptive Sector in all kinds of problems and/or needs to defend and help their resolution.
- To promote the representativeness, presence and improvement of the image of the Basque Receptive Sector for civil society, the media and Institutions.
- To act as formal and legal Representation of its Members and of the Basque Receptive Sector for any type of official or private Institution or Entities



Aktiba is the Basque Association of Active Tourism, Adventure Sports and Nature Companies, created in 2004 to bring together the key players in the Basque

Country's active tourism and adventure sports industry in rural and urban environments.

Aktiba represents the Basque Country's active tourism and adventure sports industry by taking part in events, negotiations and other forums considered of interest for the industry and its associated companies.

Aktiba is committed to integrating active tourism into the general tourism framework, providing companies with tools and services to enhance management, promoting professional training in the industry and fostering joint projects to absorb innovation into the industry.

Aktiba promotes regulation and standardisation in the industry as the key measure in its commitment to quality and safety in activities, and to prevent unfair competition.



APIT EUSKADI is a non-profit association composed of professional, independent tourist guides living in the Basque Country. You can contact each of its members

directly by clicking on "Guides" and can take a look at the most popular tours by clicking on "Tours". We get deeply involved in our tours so that they become a unique and unforgettable experience, sharing the best of our history, culture and lifestyle. Our goal is to offer the best quality in all our services.



Asociación
de Hostelería
Bizkaia
Ostalaritzako
Elkartea

The Hotel and Catering Association of Bizkaia is a sectoral organisation that represents the business interests of the owners of the hotel and catering subsectors and their respective activities.

A significant part of the membership is represented by what are commonly known as self-employed workers who, in turn, are owners of companies in the SME and micro-enterprise sector.



We promote tourism in Biscay province to support its hotels. As a hotel association, Destination Bilbao seeks to

build up this cutting-edge city as a tourist destination by organising events, alliances and promotional measures, among other things.

Made up of most of the hotels in metropolitan Bilbao and the rest of Biscay province, Destination Bilbao has worked to build up Bilbao as a tourist destination since 2001. The association plays an active part, together with public institutions, official bodies and private companies, in devising promotional measures to build up Bilbao as a tourist destination.



October 1991 saw the creation of the "NEKAZALTURISMOA-LANDATURISMOA" association which brings together rural farmhouses and rural guesthouses in the Basque Region. The aims of the Association

are the following:

- Foster the development of products (accommodation and services), grouped under the name NEKAZALTURISMOA - LANDATURISMOA.
- Standardised definition and classification of the existing products presently under the mentioned name, as well as carrying out commercial research studies to improve existing products or create new ones with the needs-desires of the customers.
- Control the quality of the equipment and services offered by these lodgings and their proprietors, through collaboration in drawing up a regulation considered necessary, and the mandatory fulfilment of this on behalf of all the members.
- Motivate the organisation and cooperation among the members, as well as their training and professional qualification.
- Carry out technical-economic organisation activities of the different products, with the aim of contributing to achieving maximum efficiency in carrying out the activity.
- Ensure promotion and advertising, as well as the commercialisation and distribution of the products, through the creation of their own agency, of a computerised booking service, contracts with public and/or private entities, etc.
- Establish agreements and arrangements with all types of public and/or private interlocutors in terms of the objective set out.
- Similarly, carry out as many action permitted by the regulation in force, considered necessary to defend all types of interests of the members.



The Regulatory Council of the Bizkaiko Txakolina Designation of Origin is the body responsible for protecting and overseeing the authenticity of the wines produced by the registered wineries. Our Txakoli wine had a splendid past and had enormous social and economic importance. However, towards the end of the 19th century, there was a slow decline that eventually led to a whole different situation.

It was at the beginning of the 80's when a group of wine producers formed the Txakoli Winemakers' Association (BIALTXA) and with support from the local Basque administration (the Basque Government and the Biscay Provincial Government), the recovery of this exquisite and unique libation was begun. The result of all this work and collaboration came about in 1994 with the appellation contrôlée entitled "Chacolí de Bizkaia - Bizkaiko Txakolina" (Bizkaia Txakoli).

This appellation contrôlée came about to let people know about this ancestral wine and to appreciate and protect this fruit of Atlantic winegrowing that features local varieties of grapes and the know-how of our farms (traditional cultivation of rural Bizkaia where txakoli is produced).



bilbaodendak is a platform that brings together 12 trade associations, the Ribera Market, Zubiarte, El Corte Inglés, the Bilbao Chamber of Commerce and Bilbao City Council, with the support of the Basque Government and all with the same goal: the promotion of trade and tourism.

Purpose: "Promoting a competitive and innovative commercial sector that creates jobs in the city, positioning Bilbao as a commercial city, and ensuring a complete and balanced trade offer in all districts".

Strategic goals

- Strengthen Bilbao's position as a commercial city through promotion and communication
- Encourage the development of a competitive, unique, specialized and integrated commercial offer
- Improving the competitiveness and innovation of the sector, helping companies to cope successfully with changes (technological changes, new outlet models, etc.)
- Creating collaboration strategies to strengthen Bilbao's shopping centers

Bizkaytour



Association of agrotourism properties in Bizkaia.

The agrotourism properties offer the enjoyment of the rural environment at the same time that visitors can learn from the traditional tasks of Basque farming.



XARMA

Xarma, the association of charming hotels in the Basque Country

Xarma is an association of selected charming accommodation of reduced size linked to the cultural, historical and geographical identity of the Basque Country.

All of them have been carefully selected for their gastronomic values, environment, design and historical interest and provide their guests with inspiration in the art of living.

Bilbao Tourist Hostel Association. It is a non-profit association that brings together tourist hostels in Bilbao, Bizkaia and surrounding municipalities for the common defence of their interests.



**BILBAO
BIZKAIA**

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We promote tourism in the city and attend to the people who visit us, with the aim of increasing its weight in the local economy and employment. At the same time, we are committed to trade as a catalyst for economic activity in the city. This is an area of work in which we focus our efforts on supporting the sector in the face of the challenge of innovation and changes in consumption models through projects and programmes or actions to stimulate commerce.

Bilbao Turismo
& Convention Bureau

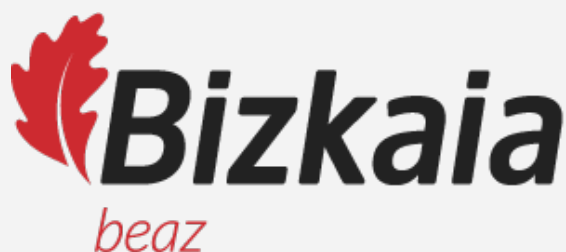
Bilbao Convention Bureau is a personalised support and assistance service for organisers of events, corporate or associative meetings of

every shape and size who are considering Bilbao as their location. In addition, we offer the necessary technical support for the presentation of applications to the city, together with specific information and advice throughout the development process of an event.



The Association "Bilbao Metropoli-30" has been formed to carry out planning, research and promotion projects, headed towards the recuperation and revitalization of Metropolitan Bilbao (defined as a social and economic reality without precise geographical limits and whose existence has been projected throughout its regional and international environment).

The Association for the Revitalization of Metropolitan Bilbao is an association of promotion and research, with full legal and patrimonial responsibility, established in May 1991 and inscribed as number AS/B/03012/1991 in the Associations' Register of the Basque Government. Its headquarters were established in Bilbao with the aim of carrying out investigation and promotion work for the revitalization of Metropolitan Bilbao, this last being mainly its territorial scope.



Beaz is a public company of the Provincial Council of Bizkaia which aims to support enterprises and entrepreneurs in their efforts to create new projects, innovate and internationalise.

A goal that lines up with the Provincial Department of Economic and Territorial Development, on which we directly depend: to contribute to the growth of economic activity and the creation of qualified jobs.

To that end, we participate in the definition and management of aid programmes granted by the Department to support an entrepreneurial path whose starting point is the creation of new companies, and its consolidation the final objective.



The Chamber of Commerce is a corporation under public law and private management whose mission is to:

- To represent, promote and defend the general interests of commerce, industry, services and the maritime sector.
- To provide services to companies.
- To carry out as many activities as necessary to promote the economy of Bizkaia.

The Chamber is a consultative and collaborative body with the Public Administrations, before which it represents the general interests of companies. Given the social and economic importance of its aims, the Law establishes that all companies are automatically included in the Chamber's Census. In order to promote active

participation in those institutions whose scope of management coincides with the general interests of the Chamber, the Chamber participates in various Entities with Representation. The control of expenditure is ensured by the external audit and by the supervision of all accounting and budgetary operations by the Supervising Administration, the Department of Tourism, Trade and Consumer Affairs of the Basque Government.



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Objectives:

- To improve the competitiveness of tourism as an economic activity which generates wealth and employment.
- To improve the position of the Basque Country in strategic segments.
- To consolidate the Basque Country brand as a tourist destination in emerging markets.
- Adaptation of the offer and development of Basque tourism products through management and issues promotion to the different market segments.
- Monitoring of the destination "Basque Country" through analysis and studies for its correct management.

6.1.3. Shopping Working Group



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We promote tourism in the city and attend to the people who visit us, with the aim of increasing its weight in the local economy and employment. At the same time, we are committed to trade as a catalyst for economic activity in the city. This is an area of work in which we focus our efforts on supporting the sector in the face of the challenge of innovation and changes in consumption models through projects and programmes or actions to stimulate commerce.



bilbaodendak is a platform that brings together 12 trade associations, the Ribera Market, Zubiarte, El Corte Inglés, the Bilbao Chamber of Commerce and Bilbao City Council, with the support of the

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Purpose: "Promoting a competitive and innovative commercial sector that creates jobs in the city, positioning Bilbao as a commercial city, and ensuring a complete and balanced trade offer in all districts".

Strategic goals

- Strengthen Bilbao's position as a commercial city through promotion and communication

- Encourage the development of a competitive, unique, specialized and integrated commercial offer
- Improving the competitiveness and innovation of the sector, helping companies to cope successfully with changes (technological changes, new outlet models, etc.)
- Creating collaboration strategies to strengthen Bilbao's shopping centers

CÁMARABILBAO



The Chamber of Commerce is a corporation under public law and private management whose mission is to:

- To represent, promote and defend the general interests of commerce, industry, services and the maritime sector.
- To provide services to companies.
- To carry out as many activities as necessary to promote the economy of Bizkaia.

The Chamber is a consultative and collaborative body with the Public Administrations, before which it represents the general interests of companies. Given the social and economic importance of its aims, the Law establishes that all companies are automatically included in the Chamber's Census. In order to promote active participation in those institutions whose scope of management coincides with the general interests of the Chamber, the Chamber participates in various Entities with Representation. The control of expenditure is ensured by the external audit and by the supervision of all accounting and budgetary operations by the Supervising Administration, the Department of Tourism, Trade and Consumer Affairs of the Basque Government.



Gernika Merkatari Elkartuak

Gernika traders' association.

Getxo  **Enpresa**

The association of commerce, hotel and catering trade and other services from the municipality of Getxo. "Getxo Company" arose from the union of a group of local companies, in order to add resources generating synergies in profit, so much individually as of the managerial set of Getxo. Our affiliation groups an important number of companies in Getxo.



The BilbaoCentro Business Grouping represents shops, bars/restaurants and services companies situated in the Abando district. Its main objective is to

promote Bilbao as a reference for shopping and leisure, both for the city's inhabitants and for its visitors and tourists. We have all of the elements necessary in order to create that magic which happens in the city centre. A modern and cultural setting, high quality commerce and luxury restaurants and hotels.

The strategy implemented by BilbaoCentro is, after all, the essence of associationism, strength through unity. We know and we are sure that united commerce does not add but rather multiplies its results. As such BilbaoCentro has started up many activities aimed at supporting the different sectors which participate in the association and to promote and boost Bilbao as reference for urban shopping and leisure.

BilbaoCentro, the professional association of traders, restaurants and hotels, and services companies in the city centre, becomes a necessary tool for the companies in their necessary interlocution with the administration, both on individual issues and in favour of improving the city from the commercial perspective. The processing and advice on grants, professional consultancy and the value added services, as well as the continuous improvement of the company positioning on the internet, all make BilbaoCentro the support reference for the sector.



The Association of Traders of the Old Quarter of Bilbao is the commercial group in the heart of the town, the Seven Streets (Zazpi Kaleak, in Basque), the largest urban, open and pedestrianised shopping centre on the Cantabrian coast. It brings together shops of all kinds, from fashion and footwear to home, craft, jewellery or pharmacy, among many others, as well as hotels and various services such as banking or tourism.

Since it was founded in 1969, making it the oldest trade association in Spain, the mission of the Traders' Association has been to look after the interests of traders in the Old Quarter, as well as working to promote and encourage Bilbao's oldest enclave and its social and urban revitalisation.



The Bizkaia Business Confederation of Commerce CECOBI was set up in 1987 with the clear objective of contributing to the improvement of the commercial fabric of Bizkaia and defending its interests in all areas.

CECOBI is made up of 45 trade and area associations in Bizkaia, which makes us a benchmark for associations in the territory. As a result, we have achieved greater representativeness, which gives us the impetus to achieve our goals.



As of today, Ezkerraldenda brings together the 8 associations of traders and hotel and restaurant owners that exist in our region, which are as follows:

- ACHA - ABANTO TRADERS AND HOTEL AND CATERING ASSOCIATION
- ACE BARAKALDO - BARAKALDO URBAN BUSINESS AND COMMERCE ASSOCIATION
- MUSKIZ TRADERS' ASSOCIATION
- ORTUUELLA TRADERS' ASSOCIATION
- PORTUGALETE PROFESSIONAL AND COMMERCIAL ASSOCIATION
- SANTURTZI UNITED BUSINESS ASSOCIATION
- SESTAO TRADERS' ASSOCIATION
- BATURIK - TRAPAGARAN TRADERS AND HOTEL AND CATERING ASSOCIATION



Ace Barakaldo, Association of Commerce and Urban Enterprise of Barakaldo was born in 2011 as a result of the grouping of the different commercial and hotel and catering associations of Barakaldo: the Association of

Traders of Arteagabeitia-Zuazo, the Association of Traders and Entrepreneurs of Beurko Bagatza, the Association of Traders of Cruces and the Association of Traders of Arrandi. They decided to merge into one to be able to fight for the common interests of all the urban commerce and business in Barakaldo.

AceBarakaldo represents more than 200 small businesses and associated companies and continues to grow day by day to encourage the local economy and protect their rights, as Barakaldo is currently the town with the highest number of large supermarkets.

From the Association, we seek to maintain the largest possible number of associated businesses and companies, as we believe that the union of all of them is the strength that helps the local development of Barakaldo. We want to avoid empty premises and ensure that the economy of our citizens results in growth for the city itself. We want Barakaldo to be a large urban shopping centre, where quality establishments can be found and where stable employment is generated



The Federation was created with clearly defined OBJECTIVES, which are detailed below (art. 2 Statutes), based on its "character as an employers' organisation" to "intervene in labour relations, contributing to the defence and promotion of economic and social interests (...) as a coordinating body (...) of general interests", developing the following aims, among others:

a) The representation, management, defence and promotion of the economic, professional, social and cultural interests of commerce (...).

c) To defend, for the public good, the interests of the federated Associations as a whole, as well as those of the sectors represented, in the economic, social and financial spheres.

e) To contribute to the economic promotion (...).

6.1.4. Air Connectivity Working Group



AENA Bilbao Airport Bilbao airport is one of the most outstanding expressions of the renewal and new strength of the city of Bilbao. It is located 12 kilometres from the capital of the Biscay province.

Over the last few years, Bilbao's airport has effectively faced constant traffic growth, primarily domestic, but also increasingly international, thanks to its good connecting flights to the continent's major hub airports and the main tourist cities and business centres.



The Chamber of Commerce, with the support of the Provincial Council of Bizkaia, works from Bilbao Air to make the airport a European reference among regional airports for the integral quality of the services it provides to passengers, aircraft and goods. It also contributes to the socio-economic development of the geographical environment in which it is located.



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Objectives:

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- To consolidate the Basque Country brand as a tourist destination in emerging markets.
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- Monitoring of the destination "Basque Country" through analysis and studies for its correct management.



Within the Department of Economic Development, Sustainability and Environment, the Directorate of Transport Planning carries out its

functions in the following areas of action of the Vice-Ministry of Infrastructures and Transport:

- Road network.
- Rail, land, sea, river and cable transport.
- Airports, heliports.



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6.1.5. Inclusive Tourism Working Group



AZERI Natura Guztiontzat is a small social initiative cooperative. During this time, it has received the first prize in the "Business Projects Competition" organised by WORK-LAN in 2015 and the second prize URRATSBAT 2016.

It has also received recognition from FEKOOR, for promoting inclusion in nature and the Bihotza Saria '16 in the field of entrepreneurship. Our experiences are unique and in many cases unforgettable due to their pioneering and/or innovative nature.



At Puntodis, as experts in accessibility in communication, we have been working in the world of Signage since 1995 and in 2004 we specialised in Design for All. The knowledge acquired during this time has allowed us to develop our own manufacturing and design patents.

We participate as expert advisors in different competitions for the Accessibility of the built environment and tourism as well as with our experience in specialised training courses such as the International University of Catalonia "Postgraduate in Universal Accessibility", University of La Salle and University of Jaén (Madrid Accessibility week).

We are members of standardisation committees as spokespersons for the development of UNE technical standards related to the requirements of Universal Accessibility and CTN 170.



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IMPRCIBL#'s mission is to generate positive social impact, contributing to the transformation of society, embracing diversity and promoting human and sustainable development.

Developing high social impact events that showcase the unique spirit of each organisation, based on the creation of specific and complementary work teams that capture and transmit the essence of what we want to communicate. We believe in the

causes we defend, we get personally involved and we become the trusted partner that strengthens organisations and provides effective and imaginative solutions.



BIDAIDEAK is a Basque organisation of people with functional diversity constituted as a non-profit association, independent of public administrations and other private or para-state organisations, whose mission is to eradicate the elements that generate handicaps and prevent the equal social participation of people with disabilities. Likewise, it tries to continuously improve the quality of life of the people who make up its reference group and to be a social agent with proposals for progress towards a fairer, more inclusive and supportive society.

Bidaideak develops a varied set of programmes and activities that are based on associative initiative and collective work, with the aim of articulating specific proposals that enable progress to be made towards the objectives over which it presides.

BIDAIDEAK is a founding member of the Federation of Associations of People with Disabilities of Bizkaia HELDU, of the Saiatu-Rehabilitation and Sports Foundation, and is also a member of the ECOM Federation.



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6.1.6. Cruise Tourism Working Group



The tourism area within Getxo town council responsible for sustainable development of tourism in the municipality.



Our goal is to maintain and strengthen the Port of Bilbao's role as the main intermodal logistics hub in the north of the peninsula and southwest of the French state, extending its logistics hinterland to these territorial areas.

To do this, we seek to promote the development of the Port of Bilbao as a comprehensive offer of services to meet the needs of our customers, and to boost economic activity in our area of influence, within a framework of innovation and sustainability.



In 1992 the Basque Government, the Provincial Council of Bizkaia and Getxo Town Council set up the Sociedad Publica Puerto Deportivo el Abra - Getxo S.A. with the aim of building and operating the Getxo Marina.

After the infrastructure works were completed, in December 1994 the Bilbao Port Authority granted the administrative concession for the operation of the Getxo Marina to the Sociedad Publica Puerto Deportivo el Abra - Getxo S.A., for a period of 30 years, which expires on 4 January 2025.

The Getxo Marina is currently operated by the company Getxo Kaia S.A. by virtue of the surface right it holds.

At present, the Getxo Marina is one of the tourist gateways to the Basque Country, thanks to the three cruise terminals that exist and which provide a tourist traffic of close

to 100,000 visitors. It is also one of the leading marinas in the Basque Country and one of Getxo's tourist, commercial, sporting and social centres of attraction.



**BILBAO
BIZKAIA**

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NORTH INCOMING SERVICE

North Incoming Services since 1992 we create experiences that will amaze you

Experiences: We do not seek the passive traveller who is blown willy-nilly throughout an infinity of tourist spots in Euskadi. Rather, what we seek out is a tourist who blends in with their environment while partaking of pleasurable activities to truly feel our destination close to the heart.

MICE: At NIS we specialise in incentive programmes. Your participants will remember their stay in Baskland as one trip not to be forgotten. The team building activities have been proven over time given the resounding success achieved with an uncountable number of companies.

Wine & Food: You can go on a pintxo route, attend a pintxo workshop to see first-hand how to make them, or even cook shoulder-to-shoulder with a Michelin star chef. Participate in a blind wine-tasting session and dine in a winery, among many other possibilities.



At BILBAO PASO A PASO we are one of the oldest inbound tourism companies in the Basque Country, with more than twenty years of experience. We specialise in MICE tourism, incentives, business travel, events, cruises, LGTB+ and Basque diaspora with special emphasis on the Basque Country, Navarre, Cantabria, La Rioja and the French Basque Country,

and we are the leading specialists in group management for the Japanese market in the Basque Country.

Travel Tailoring: We also coordinate cruise ship stopovers for different companies in the ports of Asturias, Cantabria and the Basque Country.

We consider ourselves a "Travel Tailor" because we design each and every trip to measure, making them unique and exclusive.



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6.1.7. LGTBQ+ Working Group



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Bilbao has been hosting Bilbao Bizkaia HARRO since 2015, a "city and Territory" initiative to celebrate sexual and affective diversity and the solidarity of citizens in favour of the rights of LGBTI people around the world.

Bilbao Bizkaia HARRO wants to turn Bilbao and Bizkaia into an international reference point, mainly in the Atlantic axis.

We are also committed to building a proud Bizkaia. We want to encourage each municipality to have its own programme offering them different activities (theatre plays, cinema, entertainment activities,...).

Bilbao Historiko

Association for the promotion of the historic neighbourhoods of Bilbao (Casco Viejo, San Francisco, Bilbao La Vieja, Zabala and Atxuri) that seeks to dynamise and build bridges between these areas through socio-cultural activities.



A pioneering Destination Management Organisation (DMO) in the Basque Country, with 20 years of experience in the fields of planning, management and promotion of tourist destinations.

Our consultancy and management service covers the study, development and execution phases of the project, thus supporting the entire tourism cycle.



Asociación Ortzadar LGBT Elkarte. The aims of this Association are:

1. To promote in society in general and among young people in particular, respect for human rights and the values of equality and diversity. Especially those related to family, affective, sexual and gender diversity.
2. Defend the rights of all LGBT people - gays, lesbians, bisexuals, trans,...- by strengthening the conditions that allow for their full personal fulfilment and their social integration and social participation on equal terms.
3. Actively promote the education and research system to train, research, disseminate and transfer knowledge on the basis of human rights and, in particular, respect for human rights and especially respect for the rights of the LGBT community.
4. To collaborate so that any person can live their sexual orientation or identity in a harmonious and satisfactory way, both on a personal and social level.
5. Work to inclusively incorporate affective and sexual diversity in youth organisations and spaces.

6.1.8. Txakoli Working Group



The department of Sustainability and Natural Environment takes part in this working group.



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The Hotel and Catering Association of Bizkaia is a sectoral organisation that represents the business interests of the owners of the hotel and catering subsectors and their respective activities.

A significant part of the membership is represented by what are commonly known as self-employed workers who, in turn, are owners of companies in the SME and micro-enterprise sector.



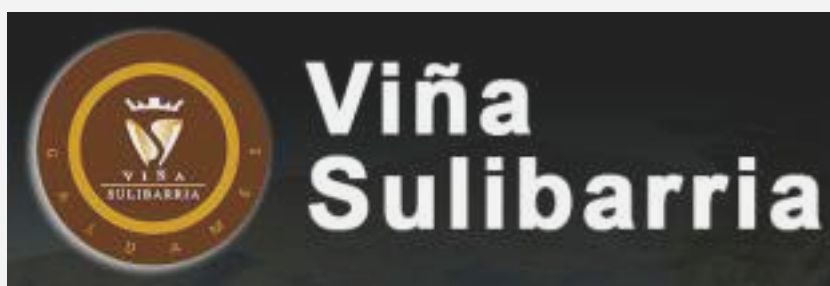
The Regulatory Council of the Bizkaiko Txakolina Designation of Origin is the body responsible for protecting and overseeing the authenticity of the wines produced by the registered wineries. Our Txakoli wine had a splendid past and had enormous social and economic importance. However, towards the end of the 19th century, there was a slow decline that eventually led to a whole different situation.

It was at the beginning of the 80's when a group of wine producers formed the Txakoli Winemakers' Association (BIALTXA) and with support from the local Basque administration (the Basque Government and the Biscay Provincial Government), the recovery of this exquisite and unique libation was begun. The result of all this work and collaboration came about in 1994 with the appellation contrólée entitled "Chacolí de Bizkaia – Bizkaiko Txakolina" (Bizkaia Txakoli).

This appellation contrôlée came about to let people know about this ancestral wine and to appreciate and protect this fruit of Atlantic winegrowing that features local varieties of grapes and the know-how of our farms (traditional cultivation of rural Bizkaia where txakoli is produced).



Located in Gernika, the Winery is just like the Urdaibai Biosphere Reserve to which it belongs: constantly evolving, full of diversity, natural and complex. The restless and innovative spirit of the team has led to a new concept for Txakoli stemming from respect for the natural environment. We have small 2000, 5000 and 10,000 litre tanks so we can use the grapes from each of our plots separately. We have all of the technology necessary to make quality white wines. We see our Winery and technology as the tools to make sense of our work in the vineyard. We make our wines with an intelligent blend of art and technology, entwined with sensitivity. Practising respectful oenology forms the bridge between Nature and a great wine.



Bodegas de Galdames is a modern and avant-garde winery in which we have the most modern technology and at

the same time we maintain the most natural procedures to obtain high quality Txakolis. They produce three types of Txakoli within the Bizkaiko Txakolina D.O.: Errota Zaharra, Torre de Loizaga Bigarren And Torre de Loizaga selección.



Concern for the proper management of the important cultural heritage of Bizkaia has been a constant feature of the actions of the Provincial Bodies of the Historical Territory of Bizkaia.

In this sense, in 2009, the Department of Culture of the Provincial Council of Biscay resorted to collaboration with one of the most prestigious cultural consultancy entities in the world to carry out a diagnosis of the situation of the dissemination of the cultural heritage of Biscay and a proposal for future action in this field.

Thus, an analysis was made of the infrastructures aimed at disseminating the cultural heritage in Bizkaia (museum offer in the broadest sense of the term; that is, provincial entities -owned and/or shared- as well as private ones subsidised by the Provincial Institution aimed at the dissemination of Biscay's cultural heritage, avant-garde art, and even the internal structure of the Provincial Department of Culture itself as regards the management of cultural heritage), which was then sifted through a comparison of the reference management models, concluding on the need to create a common management unit for all these entities or infrastructures in Bizkaia, both from the point of view of efficiency in their management, as well as from the point of view of maximising the investment made in them by the Provincial Council of Bizkaia. Based on this context, the creation of a Management Unit in Bizkaia offered a series of very important opportunities for the DFB.



ATRAE is the joint venture of the most important receptive agencies of the entire Basque Country.

At the end of 2014 we created the association ATRAE with a total of 20 agencies throughout the Basque territory with some very clear ends:

- To contribute to defending and promoting the economic and social interests inherent in the activity of its Associates.
- To contribute to the promotion and development of the Basque Country as a tourist destination for Package Tours.
- To promote professionalisation and improvement of the Basque Tourism Sector and mainly that referring to Receptive Travel Agencies and existing tourist elements.
- To be a channel for the Basque Receptive Sector in all kinds of problems and/or needs to defend and help their resolution.
- To promote the representativeness, presence and improvement of the image of the Basque Receptive Sector for civil society, the media and Institutions.
- To act as formal and legal Representation of its Members and of the Basque Receptive Sector for any type of official or private Institution or Entities



Aktiba is the Basque Association of Active Tourism, Adventure Sports and Nature Companies, created in 2004 to bring together the key players in the Basque

Country's active tourism and adventure sports industry in rural and urban environments.

Aktiba represents the Basque Country's active tourism and adventure sports industry by taking part in events, negotiations and other forums considered of interest for the industry and its associated companies.

Aktiba is committed to integrating active tourism into the general tourism framework, providing companies with tools and services to enhance management, promoting professional training in the industry and fostering joint projects to absorb innovation into the industry.

Aktiba promotes regulation and standardisation in the industry as the key measure in its commitment to quality and safety in activities, and to prevent unfair competition.



October 1991 saw the creation of the "NEKAZALTURISMOA-LANDATURISMOA" association which brings together rural farmhouses and rural guesthouses in the Basque Region.

The aims of the Association are the following:

- Foster the development of products (accommodation and services), grouped under the name NEKAZALTURISMOA - LANDATURISMOA.
- Standardised definition and classification of the existing products presently under the mentioned name, as well as carrying out commercial research studies to improve existing products or create new ones with the needs-desires of the customers.
- Control the quality of the equipment and services offered by these lodgings and their proprietors, through collaboration in drawing up a regulation considered necessary, and the mandatory fulfilment of this on behalf of all the members.
- Motivate the organisation and cooperation among the members, as well as their training and professional qualification.
- Carry out technical-economic organisation activities of the different products, with the aim of contributing to achieving maximum efficiency in carrying out the activity.
- Ensure promotion and advertising, as well as the commercialisation and distribution of the products, through the creation of their own agency, of a computerised booking service, contracts with public and/or private entities, etc.
- Establish agreements and arrangements with all types of public and/or private interlocutors in terms of the objective set out.

- Similarly, carry out as many action permitted by the regulation in force, considered necessary to defend all types of interests of the members.



The Encartaciones Tourism Association - ENKARTUR was set up in Balmaseda with the aim of carrying out all kinds of promotional and study activities aimed at giving greater tourist and economic projection to the geographical area of Las Encartaciones, defined as a social and economic reality. Founded in November 1999, the Encartaciones Tourism Association, ENKARTUR, is made up of public institutions, as well as companies, individuals and cultural and sports associations, thus bringing together the different social spheres of the geographical area of Encartaciones.

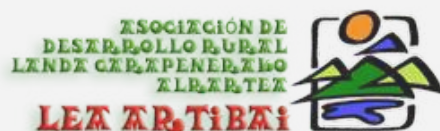


Gorbeialde is a non-profit association whose purpose is to promote the socioeconomic development of the Arratia-Nerbión region. This association, which has been active for more than 20 years, was created with the conviction that it was necessary to work for the maintenance of the primary sector as the main asset of the rural economy. Today rural development encompasses other areas than the purely agrarian. Rural development is therefore that effort aimed at improving the quality of life of the inhabitants of these geographical areas.



The Urkiola Rural Development Association is an association that works to promote rural development projects in Durango and make the social fabric sensitive to rural development activities.

Its activity is to establish agreements with public administrations and liaise with other Rural Development organizations to carry out projects.



The Lea-Artibai Rural Development Association operates mainly in the Lea-Artibai region of Bizkaia, covering the municipalities of Amoroto, Aulestia, Berriatua, Etxebarria, Gizaburuaga, Ispaster, Lekeitio, Markina-Xemein, Mendexa, Munitibar-Arbatzegi-Gerrikaitz, Ondarroa and ziertza-Bolibar.

The aims of the Rural Development Associations are to achieve the general and sectoral objectives set out in Law 10/1998 of 8 April, on Rural Development.



JATA-ONDO
URIBEKO LONDRA GERRA-PENEREKO ELKARTEA

Jata-Ondo is the Association for Rural Development (A.D.R.) which is responsible for the development of the rural areas of the Uribe

region, working in different areas such as land management, agriculture and forestry, health, environment and tourism, among others. To this end, it has set up various projects and programmes that facilitate the achievement of the objectives set for the region, as well as being the collaborating entity, and therefore recognised, for the management of aid for rural development in the region of Uribe.



Urremendi is a Rural Development association whose sole objective is to promote the development of the region of Busturialdea, which is understood to include the municipalities of Ajangiz, Arratzu, Bermeo, Busturia, Ea, Elantxobe, Ereño, Errigoiti, Forua, Gautegiz-

Arteaga, Gernika-Lumo, Ibarangelu, Kortezubi, Mendata, Morga, Mundaka, Murueta, Muxika, Nabarniz and Sukarrieta.



URDUÑA
ORDUÑA

The tourism area within Orduña city council responsible for sustainable development of tourism in the municipality.

BASQUE
TOUR

turismoaren
euskal agentzia
agencia vasca
de turismo

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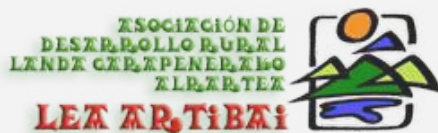
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JATA-ONDO
URIBEKO LONDRA GERRA-PENEREKO ELKARTEA

Jata-Ondo is the Association for Rural Development (A.D.R.) which is responsible for the development of the rural areas of the Uribe region, working in different areas such as land management, agriculture and forestry, health, environment and tourism, among others. To this end, it has set up various projects and programmes that facilitate the achievement of the objectives set for the region, as well as being the collaborating entity, and therefore recognised, for the management of aid for rural development in the region of Uribe.



Urremendi is a Rural Development association whose sole objective is to promote the development of the region of Busturialdea, which is understood to include the municipalities of Ajangiz, Arratzu, Bermeo, Busturia, Ea, Elantxobe, Ereño, Errigoiti, Forua, Gautezegiz-Arteaga, Gernika-Lumo, Ibarangelu, Kortezubi, Mendata, Morga, Mundaka, Murueta, Muxika, Nabarniz and Sukarrieta.



The tourism area within Orduña city council responsible for sustainable development of tourism in the municipality.



Concern for the proper management of the important cultural heritage of Bizkaia has been a constant feature of the actions of the Provincial Bodies of the Historical Territory of Bizkaia.

In this sense, in 2009, the Department of Culture of the Provincial Council of Biscay resorted to collaboration with one of the most prestigious cultural consultancy entities in the world to carry out a diagnosis of the situation of the dissemination of the cultural heritage of Biscay and a proposal for future action in this field.

Thus, an analysis was made of the infrastructures aimed at disseminating the cultural heritage in Bizkaia (museum offer in the broadest sense of the term; that is, provincial entities -owned and/or shared- as well as private ones subsidised by the Provincial Institution aimed at the dissemination of Biscay's cultural heritage, avant-garde art, and even the internal structure of the Provincial Department of Culture itself as regards the management of cultural heritage), which was then sifted through a comparison of the

reference management models, concluding on the need to create a common management unit for all these entities or infrastructures in Bizkaia, both from the point of view of efficiency in their management, as well as from the point of view of maximising the investment made in them by the Provincial Council of Bizkaia. Based on this context, the creation of a Management Unit in Bizkaia offered a series of very important opportunities for the DFB.



ATRAE is the joint venture of the most important receptive agencies of the entire Basque Country.

At the end of 2014 we created the association ATRAE with a total of 20 agencies throughout the Basque territory with some very clear ends:

- To contribute to defending and promoting the economic and social interests inherent in the activity of its Associates.
- To contribute to the promotion and development of the Basque Country as a tourist destination for Package Tours.
- To promote professionalisation and improvement of the Basque Tourism Sector and mainly that referring to Receptive Travel Agencies and existing tourist elements.
- To be a channel for the Basque Receptive Sector in all kinds of problems and/or needs to defend and help their resolution.
- To promote the representativeness, presence and improvement of the image of the Basque Receptive Sector for civil society, the media and Institutions.
- To act as formal and legal Representation of its Members and of the Basque Receptive Sector for any type of official or private Institution or Entities



Aktiba is the Basque Association of Active Tourism, Adventure Sports and Nature Companies, created in 2004 to bring together the key players in the Basque

Country's active tourism and adventure sports industry in rural and urban environments.

Aktiba represents the Basque Country's active tourism and adventure sports industry by taking part in events, negotiations and other forums considered of interest for the industry and its associated companies.

Aktiba is committed to integrating active tourism into the general tourism framework, providing companies with tools and services to enhance management, promoting

professional training in the industry and fostering joint projects to absorb innovation into the industry.

Aktiba promotes regulation and standardisation in the industry as the key measure in its commitment to quality and safety in activities, and to prevent unfair competition.



nekatur

October 1991 saw the creation of the

"NEKAZALTURISMOA-LANDATURISMOA"

association which brings together rural farmhouses and rural guesthouses in the

Basque Region. The aims of the Association are the following:

- Foster the development of products (accommodation and services), grouped under the name NEKAZALTURISMOA - LANDATURISMOA.
- Standardised definition and classification of the existing products presently under the mentioned name, as well as carrying out commercial research studies to improve existing products or create new ones with the needs-desires of the customers.
- Control the quality of the equipment and services offered by these lodgings and their proprietors, through collaboration in drawing up a regulation considered necessary, and the mandatory fulfilment of this on behalf of all the members.
- Motivate the organisation and cooperation among the members, as well as their training and professional qualification.
- Carry out technical-economic organisation activities of the different products, with the aim of contributing to achieving maximum efficiency in carrying out the activity.
- Ensure promotion and advertising, as well as the commercialisation and distribution of the products, through the creation of their own agency, of a computerised booking service, contracts with public and/or private entities, etc.
- Establish agreements and arrangements with all types of public and/or private interlocutors in terms of the objective set out.
- Similarly, carry out as many action permitted by the regulation in force, considered necessary to defend all types of interests of the members.



Asociación
de Hostelería
Bizkaia
Ostalaritzako
Elkartea

The Hotel and Catering Association of Bizkaia is a sectoral organisation that represents the business interests of the owners of the hotel and catering subsectors and their respective activities.

A significant part of the membership is represented by what are commonly known as self-employed workers who, in turn, are owners of companies in the SME and micro-enterprise sector.



The Regulatory Council of the Bizkaiko Txakolina Designation of Origin is the body responsible for protecting and overseeing the authenticity of the wines produced by the registered wineries. Our Txakoli wine had a splendid past and had enormous social and economic importance. However, towards the end of the 19th century, there was a slow decline that eventually led to a whole different situation.

It was at the beginning of the 80's when a group of wine producers formed the Txakoli Winemakers' Association (BIALTXA) and with support from the local Basque administration (the Basque Government and the Biscay Provincial Government), the recovery of this exquisite and unique libation was begun. The result of all this work and collaboration came about in 1994 with the appellation contrôlée entitled "Chacolí de Bizkaia - Bizkaiko Txakolina" (Bizkaia Txakoli).

This appellation contrôlée came about to let people know about this ancestral wine and to appreciate and protect this fruit of Atlantic winegrowing that features local varieties of grapes and the know-how of our farms (traditional cultivation of rural Bizkaia where txakoli is produced).

Bizkaytour



Association of agrotourism properties in Bizkaia.

The agrotourism properties offer the enjoyment of the rural environment at the same time that visitors can learn from the traditional tasks of Basque farming.

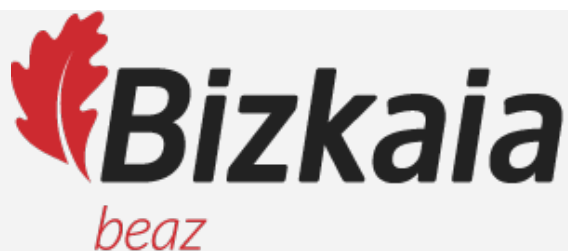


XARMA

Xarma, the association of charming hotels in the Basque Country

Xarma is an association of selected charming accommodation of reduced size linked to the cultural, historical and geographical identity of the Basque Country.

All of them have been carefully selected for their gastronomic values, environment, design and historical interest and provide their guests with inspiration in the art of living.



Beaz is a public company of the Provincial Council of Bizkaia which aims to support enterprises and entrepreneurs in their efforts to create new projects, innovate and internationalise.

A goal that lines up with the Provincial Department of Economic and Territorial Development, on which we directly depend: to contribute to the growth of economic activity and the creation of qualified jobs.

To that end, we participate in the definition and management of aid programmes granted by the Department to support an entrepreneurial path whose starting point is the creation of new companies, and its consolidation the final objective.



Basquetour is the public company of the Ministry for Tourism, Trade and Consumer of the Basque Government, created in 2006 to head the promotion and implementation of the strategy for

competitiveness established for the Basque Country, defined nowadays in the "Strategic Plan for Basque Tourism, 2020", in conjunction with the public and private organisations which make up the tourism industry in the Basque Country and according to the "Responsible Tourism Strategy of the Basque Country".

Objectives:

- To improve the competitiveness of tourism as an economic activity which generates wealth and employment.
- To improve the position of the Basque Country in strategic segments.
- To consolidate the Basque Country brand as a tourist destination in emerging markets.
- Adaptation of the offer and development of Basque tourism products through management and issues promotion to the different market segments.
- Monitoring of the destination "Basque Country" through analysis and studies for its correct management.



The University of Deusto within its Faculty of Social and Human Sciences for more than 50 years has been offering the BA on Tourism.

The University of Deusto was founded in 1886 by the Society of Jesus. Its birth coincided with the cultural concerns and interests of both the Basque Country to have its own university and the Society of Jesus to establish higher education in some part of Spain. Bilbao, a port and commercial city that was experiencing considerable industrial growth at the time, was chosen. Bilbao is the centre of a metropolitan area with more than a million inhabitants, a city traditionally open to Europe.

Beyond individual research and those coordinated from chairs such as Law and the Human Genome or Leisure and Disabilities, there is, at the institutional level, a clear option for social issues of interdependence, distribution of resources, migrations, human rights, development, poverty and the environment, ethics and society, as well as studies on cultural identity (individual and collective) and European integration processes, taking part in several international research groups.



