



Cross-Border Regional Labour Market Analysis

Case study
Region Navarre and Basque Country – New Aquitaine
(Spain – France)

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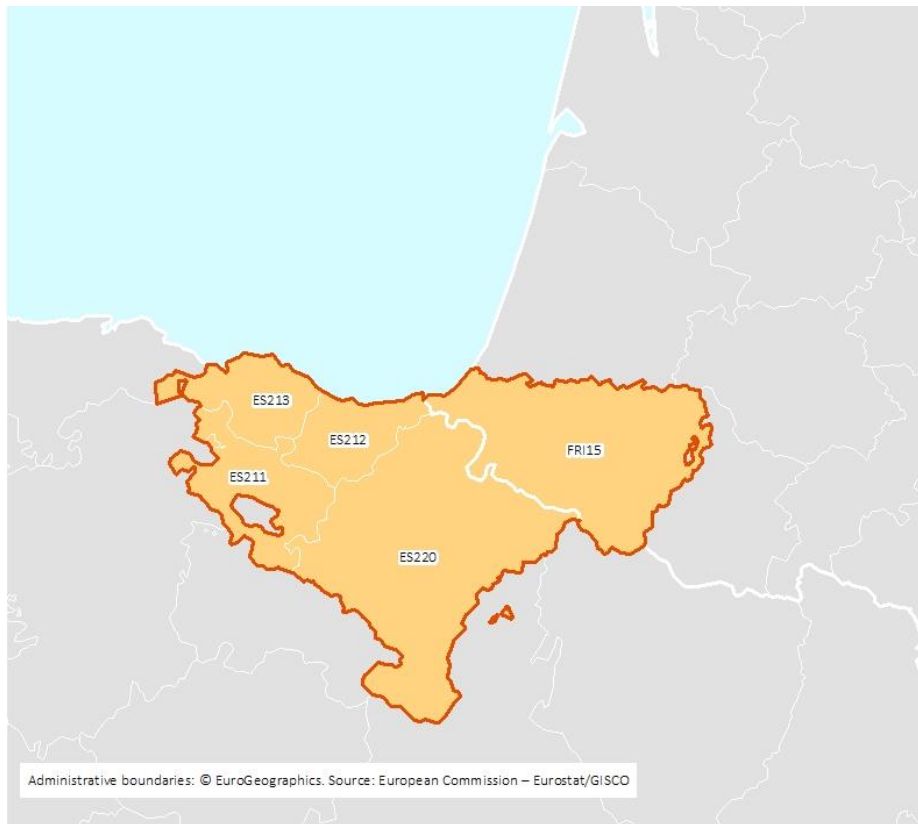
Data for the cross-border region as a whole has been calculated based on estimation techniques building mainly on aggregation of existing data sources as well as weighted-average approaches. Comparability of base data has been verified and only estimations with a reasonable degree of accuracy have been included in the case. Details on the calculation methods are outlined in the handbook delivered in the context of the project. Please interpret the corresponding results with care.

Introduction

This report falls within the scope of a DG REGIO project “Cross-border regional labour market analysis” which investigates, on a pan-European level, the state of play and specificities of cross-border (CB) labour market analyses practices. The ultimate objective of the project is to provide a knowledge basis, highlighting the potentials and hindering factors of cross-border areas employment (and related data analysis), thereby allowing for a strengthening and better integration of the area as a common labour market.

For this specific case study, the region of analysis is the following:

- New Aquitaine, Navarre and Basque Country Euroregion (France-Spain)
- Territorial scope: FRI15, ES21, ES22



Map 1: Map of the examined region

Source: ÖIR 2024 – Note: For France, due to data limitations, the entire region of New Aquitaine has been considered for some calculations. Qualitative information rather focuses on the French department (Pyrénées Atlantiques) which is highlighted on this map

1. Summary of the main results

The New Aquitaine-Basque Country-Navarre Euroregion brings together the New Aquitaine Region (France), the Autonomous Community of the Basque Country (Spain), and the Autonomous Community of Navarre (Spain) with three different official languages: Spanish, French and Basque, and in the French region, Occitan is also spoken. In this paper, the focus of the quantitative analysis will be on the Basque Country and New Aquitaine regions, although the qualitative analysis will also involve Navarre.

The Euroregion was officially recognised in 2011, including the Basque Country and New Aquitaine, and extended in 2016 with the incorporation of Navarre, forming a geographical area divided by the Atlantic Pyrenees. In 2020, the Euroregion accounted for a population of 8.7 million inhabitants, of which 1.3 million lived in the Gipuzkoa and Pyrénées Atlantiques, the two cross-border provinces, respectively part of the Basque Country and New Aquitaine regions. Within that population, 3,863 people were cross-border workers. Most of these workers (3,212) are Spanish nationals who reside permanently in France and cross the border to work in their country of origin. This situation was created by the lower cost of housing in France compared to Spain in the 1980s and 1990s, which led many Spaniards to purchase properties along the border but within French regions. By contrast, only 261 workers commute from Spain to France, working mainly in the construction sector and crossing the border due to the higher minimum wage (Interview type 4 – EGTC, Spain 2024).

The leading sector in the Basque Country and New Aquitaine regions is services, followed by industry, which is most prominent in the Basque Country. The employment rate is the highest in the French region, exceeding 70%, while gender disparities are most significant in the Spanish region. The highest unemployment rate is recorded in the 15-24 age group, around 17% in both regions (2022). Recently, the Basque Country's average gross wage surpassed that of New Aquitaine. This is a historic overtaking, considering that, in the last five years, the value has initially had a gap of a few thousand euros and then gradually decreased thanks to the increase in wages in the Basque country region and the stabilisation of wages in New Aquitaine.

The region shows clear complementarities in skills, i.e. a highly educated workforce in New Aquitaine which partially struggle to find fitting employment, while on the other hand a significant gap in skilled labour exists in both Navara and Basque country. However, difficulties in recognition of vocational training and other degrees – based on national level legislation – hinder the free flow of skilled labour to where it is required within the region.

The region's major problems include the presence of a poorly permeable border, poor communication between the parties when it concerns political and socioeconomic cooperation, and a lack of infrastructure to cross the border, such as trains or buses. This leads to the isolation of communities and prevents the development of the territory's potential. Additionally, the laws regulating cross-border workers are outdated and need renewal. It is important to promote the learning of French among Spaniards to facilitate job searches and encourage the exchange of workers through greater data sharing between national employment agencies; language is a more significant problem in Spain because there is no obligation to study a second foreign language at school, while in France this obligation exists. Therefore, it is much more common for citizens of New Aquitaine to know Spanish than for citizens of the autonomous region of the Basque Country to know French.

The Euroregion has presented a new action plan for the 2021-2027 period, which aims to increase territorial cohesion, create cross-border governance, and improve the management of the Euroregion. The region represents a case of unique circumstances, with considerable CB-workforce however mainly consisting of Spanish nationals who moved within the CB region to another country. It is a small working community with great potential for development and exchange, and measures are being taken to create new

opportunities, however significant shortcomings in terms of high-level cooperation and policy development as well as to actual cross-border analyses still pose a considerable risk.

1.1. Summary of the main results – Español

La Eurorregión Nueva Aquitania-País Vasco-Navarra, reúne a la Región de Nueva Aquitania (Francia), la Comunidad Autónoma del País Vasco (España) y la Comunidad Foral de Navarra (España) con tres lenguas oficiales diferentes: español, francés y vasco, y en la región francesa también se habla occitano. En este documento, el análisis cuantitativo se centrará en las regiones del País Vasco y Nueva Aquitania, aunque el análisis cualitativo también incluirá Navarra.

La Eurorregión fue reconocida oficialmente en 2011, incluyendo el País Vasco y Nueva Aquitania, y ampliada en 2016 con la incorporación de Navarra, formando un área geográfica dividida por los Pirineos Atlánticos. En 2020, la Eurorregión contaba con una población de 8.7 millones de habitantes, de los cuales 1.3 millones vivían en Gipuzkoa y Pirineos Atlánticos, las dos provincias transfronterizas, que forman parte respectivamente de las regiones del País Vasco y Nueva Aquitania. Dentro de esa población, 3,863 personas eran trabajadores transfronterizos. La mayoría de estos trabajadores (3,212) son españoles que residen permanentemente en Francia y cruzan la frontera para trabajar en su país de origen. Esta situación fue creada por el menor coste de la vivienda en Francia en comparación con España en los años ochenta y noventa, lo que llevó a muchos españoles a adquirir propiedades a lo largo de la frontera del lado francés.

Por el contrario, sólo 261 trabajadores se desplazan de España a Francia, trabajando principalmente en el sector de la construcción y cruzando la frontera debido al salario mínimo más elevado (Interview type 4 – EGTC, Spain 2024).

En las regiones del País Vasco y Nueva Aquitania, el sector líder es el de los servicios, seguido de la industria, más destacada en el País Vasco. La tasa de empleo es la más alta en la región francesa, superando el 70%, mientras que las disparidades entre hombres y mujeres son más significativas en la región española. La tasa de desempleo más elevada se registra en el grupo de edad de 15 a 24 años, en torno al 17% en ambas regiones (2022). Recientemente, el salario bruto medio del País Vasco superó al de Nueva Aquitania. Se trata de un adelantamiento histórico, teniendo en cuenta que en los últimos 5 años el valor ha tenido inicialmente una diferencia de algunos miles de euros y luego ha disminuido progresivamente gracias al aumento de los salarios en la región del País Vasco y a la estabilización de los salarios en Nueva Aquitania.

Según los entrevistados, los principales problemas de la región son la presencia de una frontera poco permeable, la escasa comunicación entre las partes cuando se trata de cooperación política y socioeconómica y la falta de infraestructuras para cruzar la frontera, como trenes o autobuses. Esto conduce al aislamiento de las comunidades e impide el desarrollo del potencial del territorio. Además, las leyes que regulan a los trabajadores transfronterizos están anticuadas y necesitan una renovación. Es importante promover el aprendizaje del francés entre los españoles para facilitar la búsqueda de empleo y fomentar el intercambio de trabajadores a través de un mayor intercambio de datos entre las agencias nacionales de empleo; el idioma es un problema mayor en España porque no existe la obligación de estudiar una segunda lengua extranjera en la escuela, mientras que en Francia sí existe esta obligación, por lo que es mucho más común que los ciudadanos de Nueva Aquitania sepan español que los de la región autónoma del País Vasco sepan francés.

La Eurorregión ha presentado un nuevo plan de acción para el periodo 2021-2027 cuyo objetivo es aumentar la cohesión territorial, crear una gobernanza transfronteriza y mejorar la gestión de la Eurorregión. En resumen, la región es una pequeña comunidad de trabajo

con un gran potencial de desarrollo e intercambio, y se están tomando medidas para crear nuevas oportunidades.

1.2. Summary of the main results – Français

La Nouvelle-Aquitaine-Pays Basque-Navarre Euro Région rassemble la région de la Nouvelle-Aquitaine (France), la Communauté Autonome du Pays Basque (Espagne), et la Communauté Autonome de Navarre (Espagne) avec trois langues officielles différentes : l'espagnol, le français et le basque, et dans la région française, l'occitan est également parlé. Dans cet article, l'analyse quantitative se concentrera sur les régions du Pays Basque et de la Nouvelle-Aquitaine, bien que l'analyse qualitative impliquera également la Navarre. L'Euro Région a été officiellement reconnue en 2011, incluant le Pays Basque et la Nouvelle-Aquitaine, et étendue en 2016 avec l'incorporation de la Navarre, formant une zone géographique divisée par les Pyrénées Atlantiques. En 2020, l'Euro Région comptait une population de 8.7 millions d'habitants, dont 1.3 million vivaient dans les provinces transfrontalières de Gipuzkoa et des Pyrénées-Atlantiques, respectivement parties des régions du Pays Basque et de la Nouvelle-Aquitaine. Dans cette population, 3,863 personnes étaient des travailleurs transfrontaliers. La plupart de ces travailleurs (3,212) sont des ressortissants espagnols résidant en permanence en France et traversant la frontière pour travailler dans leur pays d'origine. Cette situation a été créée par le coût moins élevé du logement en France par rapport à l'Espagne dans les années 1980 et 1990, ce qui a conduit de nombreux Espagnols à acheter des propriétés le long de la frontière française. En revanche, seulement 261 travailleurs font la navette de l'Espagne vers la France, travaillant principalement dans le secteur de la construction et traversant la frontière en raison du salaire minimum plus élevé (Entretien de type 4 – EGTC, Espagne 2024).

Dans les régions du Pays Basque et de la Nouvelle-Aquitaine, le secteur dominant est celui des services, suivi de l'industrie, plus important dans le Pays Basque. Le taux d'emploi est le plus élevé dans la région française, dépassant 70%, tandis que les disparités entre les sexes sont les plus importantes dans la région espagnole. Le taux de chômage le plus élevé est enregistré dans le groupe d'âge 15-24 ans, autour de 17% dans les deux régions (2022). Récemment, le salaire brut moyen du Pays Basque a dépassé celui de la Nouvelle-Aquitaine. Il s'agit d'un dépassement historique, étant donné que ces dernières années, la valeur avait initialement un écart de quelques milliers d'euros puis a progressivement diminué grâce à l'augmentation des salaires dans la région du Pays Basque et à la stabilisation des salaires en Nouvelle-Aquitaine.

Selon les personnes interrogées, les principaux problèmes de la région incluent la présence d'une frontière peu perméable, une mauvaise communication entre les parties en ce qui concerne la coopération politique et socio-économique, et un manque d'infrastructures pour traverser la frontière, telles que les trains ou les bus. Cela conduit à l'isolement des communautés et empêche le développement du potentiel du territoire. De plus, les lois régissant les travailleurs transfrontaliers sont obsolètes et nécessitent une mise à jour. Il est important de promouvoir l'apprentissage du français parmi les Espagnols pour faciliter la recherche d'emploi et encourager l'échange de travailleurs grâce à un partage accru de données entre les agences nationales pour l'emploi ; la langue est un problème plus important en Espagne car il n'y a pas d'obligation d'étudier une deuxième langue étrangère à l'école, alors qu'en France cette obligation existe, et donc il est beaucoup plus courant que les citoyens de la Nouvelle-Aquitaine connaissent l'espagnol que pour les citoyens de la région autonome du Pays Basque de connaître le français. L'Euro Région a présenté un nouveau plan d'action pour la période 2021-2027 qui vise à accroître la cohésion territoriale, à créer une gouvernance transfrontalière et à améliorer la gestion de l'Euro Région. En résumé, la région est une petite communauté de travail avec un grand potentiel de développement et d'échange, et des mesures sont prises pour créer de nouvelles opportunités.

2. Main characteristics of the region's labour market

2.1. Location and key features of the cross-border region

The Euroregion “New Aquitaine-Basque Country-Navarre” is a transborder and transnational space, a European Grouping of Territorial Cooperation involving three regions: New Aquitaine (in France) Basque Country and Navarre (in Spain), where different biogeographical zones, governance systems and policies coexist (Gemma García Blanco, 2020). In this paper, the authors refer to the entire Euroregion. Still, the detailed quantitative analysis is focused on the French region of New Aquitaine and the Spanish region of Basque Country, which together concentrate the highest share of the population in the Euroregion (68% in New Aquitaine and 25% in the Basque Country, according to (NAEN, 2017) and possess the most robust cross-border communication networks. Specifically, when the data allows, consideration will be given to two specific geographic areas: the province of Gipuzkoa (Basque Country) and the Pyrénées-Atlantiques department (New Aquitaine), which, within the respective regions, are the NUTS3 units located in the border.

The idea of a cross-boundary community arose in 1983 with the creation of the Working Community of the Pyrenees. It was then fully developed in 2004 when the PLAÉ (Aquitaine-Basque Country Logistics Platform) tool was shaped in the form of a European Economic Interest Grouping (EEIG). This structure got the name of European Grouping for Territorial Cooperation (EGTC) by signing a joint declaration of the two regional presidents in 2009 and the official creation of the Aquitaine-Basque Country Euroregion with headquarters in Hendaye in 2011 (Euroregion, Euroregion history, s.f.). In 2016, the Navarre region adhered to the agreement, leading to the current configuration of the Euroregion.

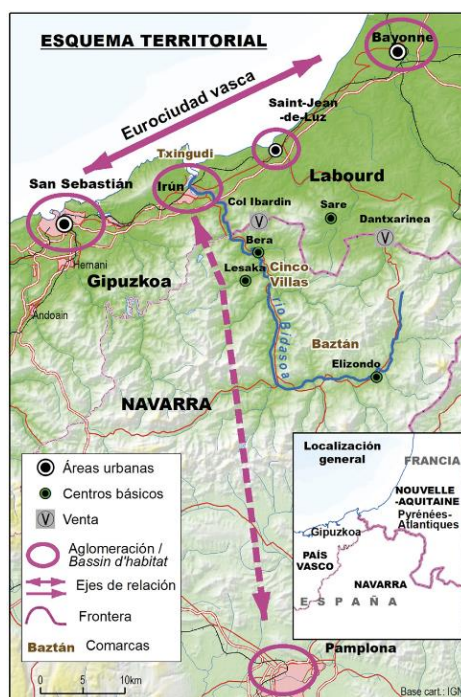
From a geographical point of view, the Euroregion formed by the Basque Country, Navarre and New Aquitaine is in the Atlantic Ocean area, crossed by the Atlantic Pyrenees chain. It comprises 101,678 km² and has a population of approximately 8,745,000 inhabitants (2020) (Euroregion, Euroregion history, s.f.), of which 1.4 million (2022) live in the Gipuzkoa and Pyrénées Atlantiques (own elaboration from INE and INSEE databases)¹, the two cross-border departments, respectively part of the Basque Country and New Aquitaine region.

“Due to the presence of the Pyrenees, the border is difficult to cross, and the number of registered cross-border workers is only 3,863” (Interview type 4 – EGTC, Spain 2024). The Pyrenees create a natural delimitation of the border, except for the eastern and western extremes, where the chain leaves room for the circulation of international flows, which has also motivated the socio-economic and development differences in the area (Lorenzo López-Trigal, 2021).

In the Basque Country, the population is concentrated in the metropolitan areas of the three provincial capitals, and the rest is distributed in the polycentric system of medium-sized cities. On the French side, the dominance of urban centres is less pronounced. (DATAPASS Database, s.f.)

The territorial system is shaped by a “coastal conurbation”, a strip where the population and activities deriving from transport, industry and services are concentrated. It is composed of the interconnected basins of San Sebastián, Bidasoa (ES), Nivelle (Saint-Jean-de-Luz) and Bayonne-Anglet-Biarritz (FR) (Lorenzo López-Trigal, 2021).

¹ INE: <https://www.ine.es/jaxiT3/Datos.htm?t=33783>, INSEE: <https://www.insee.fr/fr/statistiques/1405599?geo=DEP-64>



Map 2: Map of the Euroregion

Source: (Lorenzo López-Trigal, 2021)

The population of the Euroregion New Aquitaine-Basque Country-Navarre in 2023 is estimated at 8.84 million inhabitants, of which 93% is in the first two regions (New Aquitaine and Basque Country), with a higher density in the north of the Euroregion, close to the littoral coast where most of the population lives, in contrast with the high degree of depopulation observed in the central area of the Euroregion. (DATAPASS Database, s.f.)

Regarding population dynamics, the Euroregion is experiencing an ageing process, observed on both sides of the border, with currently around 20% of inhabitants older than 65 (Interview type 4 – EGTC, Spain 2024).

Specifically in the Basque Country, 63% of the population resides in the metropolitan areas of the three biggest cities: Bilbao, Vitoria and San Sebastián. The remaining population is distributed across the polycentric system of medium-sized cities that define the urban structure of the region (DATAPASS Database, s.f.). On the French side, urban centres appear to have less dominance. Notably, the coastal conurbation from Boucau to Hendaya hosts 58% of the total French population. Pau and its surrounding urban areas within the Pau-Béarn-Pyrénées agglomeration account for 44% of Béarn's total population (DATAPASS Database, s.f.).

The fundamental communication network is represented by road transport in the corresponding sections of the AP-8 and NI motorways, which connect through the Behobia/Bébobie pass with the French road network, and by rail transport, served by three companies and three railways (RENFE, SNCF, Basque Railways) (Lorenzo López-Trigal, 2021).

With regards to the GDP, this accounted for 79.35 million euros in the Basque Country and 199.57 million euros in New Aquitaine in 2022, according to Eurostat data. In terms of GDP per capita, the Basque Country holds the highest figures, with 36.45 thousand euros per capita, compared to 32.73 thousand euros per capita in New Aquitaine.

To take into account the purchase power, data on gross domestic product measured in million purchasing power standard is compared. In 2022, it was around 85 million for the Basque Country and 184 million for New Aquitaine. This indicator has slowly grown in the period 2018-2020, with the exception of a decrease in 2020, due to the Covid-19 pandemic, in both regions.

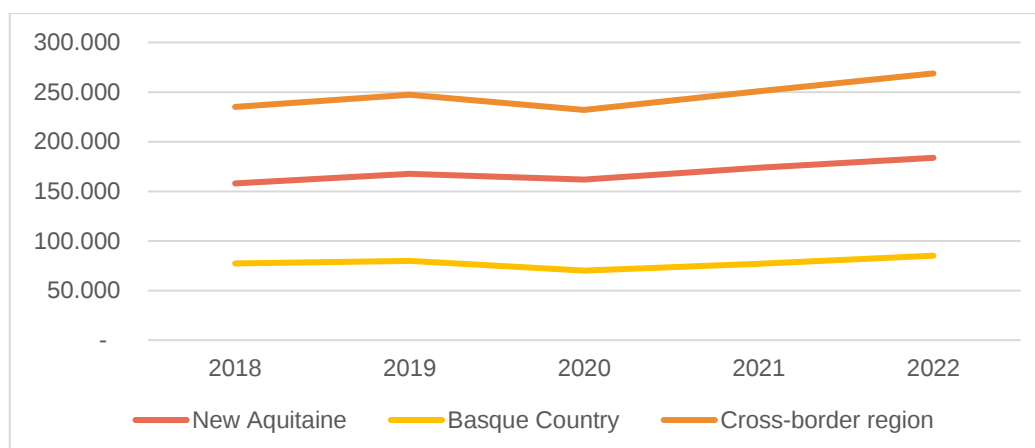


Figure 1: Evolution of the regional gross domestic product 2018-2022, measured in million purchasing power standards, for Basque Country and New Aquitaine

Own elaboration based on EUROSTAT:

<https://ec.europa.eu/eurostat/databrowser/view/tgs00004/default/table?lang=en>²

Once more, if we look at the purchasing power standard per inhabitant, the numbers are higher in the Basque Country, with 38.60 PPT/inhab, compared to 29.90 PPT/inhab in New Aquitaine in 2022. Focusing on the two specific cross-border provinces in both countries, Figure 2 shows a higher PPS in the Spanish cross-border province of Gipuzkoa, compared to the French counterpart. Similarly to the GDP, in 2020 the PPS also had a decrease in its value.

The educational attainment of the Euroregion's population is high, surpassing the European mean. Specifically, in 2016, 31% of individuals aged 25 to 64 in New Aquitaine possessed tertiary education, whereas in the Basque Country, the proportion was 49%, contrasting with the EU-28 average of 31%. In the 30 to 34 age group in the Basque Country, 57% held at least tertiary education, while New Aquitaine recorded a rate of 39%. The situation differs concerning intermediate qualifications across the different regions of the Euroregion. New Aquitaine slightly exceeds the European average, with 49% of individuals possessing such qualifications, but the Basque Country faces a deficit, with 22% of individuals with these qualification levels. (Interview type 1 – PES, France, 2024).

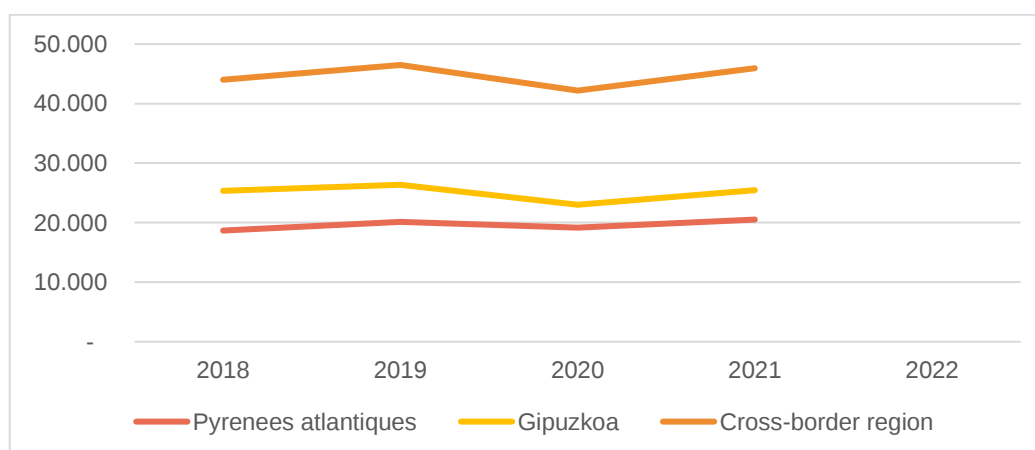


Figure 2: Gross domestic product (million PPS) evolution (2018-2022) for Gipuzkoa and Pyrénées Atlantiques.

Own elaboration from EUROSTAT: <https://ec.europa.eu/eurostat/databrowser/view/tgs00004/default/table?lang=en>³

The region's official languages include Basque, Spanish, and French; in addition, Occitan is spoken mainly on the French side (Interreg Europe, s.f., págs. 20-23). Regarding

² Data for the cross-border region has been calculated based on aggregation

³ Data for the cross-border region has been calculated based on aggregation

language learning, available data shows that learning Spanish is more common among Aquitanian students than learning French in Basque Country and Navarre. “For several years now, the learning of French has been ‘abandoned’ in Spain in favour of English” (Interview type 1 – PES, France, 2024). The primary reason for this situation lies in the differences between the two educational systems in the Euroregion (Interreg Europe, s.f., págs. 20-23); “in France the study of a second foreign language is compulsory, while in Spain it is not” (Interview type 4 – EGTC, Spain 2024).

2.2. Evolution and trends of the labour market

As explained in section 2.1, the number of registered cross-border workers is slightly below 4,000. Most of the transit of workers occurs from France to Spain: out of 3,863 identified cross-border workers, 3,212 are French residents who cross the border to work in Spain, mainly Spanish workers who bought houses in France during the 1980s and 1990s because the price of land was lower in France at that time, compared to the Spanish side. They relocated their homes and residency while continuing to work in their home country, where they kept all their social links. Many have been cross-border workers for 10-15 years and are open to international mobility, having previously moved within Spain or to other EU countries.⁴ By contrast, in the other direction, the flow of workers is very low, with approximately 390 individuals commuting from the Basque Country and 261 from Navarre to the New Aquitaine region, all bound for France. It is important to note that when assessing the total number of commuting workers, identifying self-employed workers is extremely challenging, which may result in imprecise data.⁵ Nevertheless, most of the existing employment in the Euroregion (80-85%) is salaried, while the remaining 15-20% corresponds to self-employment (Interreg Europe, s.f., pág. 28).

According to the interviews held with the representatives of the Euroregion “the small number of Spanish workers who choose to work in France do it because of the higher wages, particularly in the construction and industrial sectors, where they benefit from the higher French minimum wage, compared to the Spanish one.”

To characterise the profile of commuter workers, it is important to note the level of education of the population in the Euroregion, explained in section 2.1. This is resumed in a high share of the population with tertiary education, especially in the Basque Country, and a deficit of people with intermediate qualifications in this region.

Additionally, the differences in language training can be especially relevant for some professions: “this is an obstacle for certain scarce professions (health or transport), together with the recognition of diplomas or driving licences” (Interview type 1 – PES, France, 2024). The French Employment Service also pointed out that “in some sectors, such as agriculture, the influx of seasonal labour is an important factor for the region beyond the border area” (Interview type 1 – PES, France, 2024).

The closure of the border between France and Spain due to the COVID-19 emergency impacted the work lives of those who lived between New Aquitaine and the Basque Country or Navarre, as well as the cross-border cooperation projects. To understand and mitigate this impact, the NAEN Euroregion surveyed the residents of these places. Of those surveyed, 62.3% live in New Aquitaine and 20.6% in the province of Gipuzkoa (Basque Country), the majority of whom cross the border weekly for socioeconomic and work reasons.

The main obstacles identified during the pandemic include the loss of freedom of movement for face-to-face services or meetings with clients, delays in cross-border work and insecurity

⁴ Information from Euroregion interview

⁵ Finding from Euroregion interview

about being able to meet working hours, difficulties in the processing of ERTes (temporary lay-off schemes), or the financing procedures and preparation for the reopening of the activity, and lack of means, resources or space necessary for agile teleworking. In companies with cross-border workers, 56.3% have taken extraordinary measures to address the COVID-19 situation, highlighting teleworking (54.2%) and ERTes (39.1%).

According to the French Employment Service, “the COVID period highlighted the differences in social protection on both sides of the border. Spanish employees took a long time to receive benefits from the Spanish employment services, while partial unemployment benefits were paid by the companies, which therefore continued to receive their salaries monthly. An added difficulty was the management of these benefits for employees in Spain with a bank account in France, who had to wait even longer before receiving state aid” (Interview – PES, France, 2024). This period therefore highlighted some coordination problems in administrative procedures for cross-border workers and the need to improve this coordination (Impacto socioeconómico del cierre de la frontera - Euroregion, 2021)

The results of the COVID-19 impact study highlight the difficulties faced by cross-border citizens, who live between different administrative and legal systems. The aim of the European Groupings of Territorial Cooperation is to facilitate and promote territorial cooperation, and therefore the authorities of the Euroregion have taken note of the results of the study and have put particular emphasis on access to cross-border information and on the casuistry of cross-border workers. (Impacto socioeconómico del cierre de la frontera - Euroregion, 2021).

2.3. Differences, imbalances and complementarities across the border

The Basque Country and New Aquitaine present differences in many aspects, the first being their weight in the population of the Euroregion, the population density and the population growth in the last few years.

In 2023, the population of these two regions was 2,216,302 inhabitants in the Basque Country and 1,250,891 in New Aquitaine.⁶ The population density in 2021 was 304 inhabitants per square kilometre and 72⁷, respectively. Upon closer examination of the provinces nearest to the border, Gipuzkoa and Pyrénées-Atlantiques, it is observed that both regions have a higher population density compared to the regional averages, especially Gipuzkoa, with a population density of 385 inhabitants per square kilometre, while Pyrénées-Atlantiques has 91⁸

When considering the population change over the last five years, as shown in Figure 3, we observe that in New Aquitaine the growth rate has been higher compared to the Basque Country, where it has remained nearly unchanged. However, it is still limited in both regions.

⁶ Data from: Eurostat <https://ec.europa.eu/eurostat/databrowser/view/tgs00096/default/table?lang=en>

⁷ Data from: Eurostat https://ec.europa.eu/eurostat/databrowser/view/tgs00024_custom_12039650/default/table?lang=en

⁸ Own Elaboration from EUROSTAT data: https://ec.europa.eu/eurostat/databrowser/view/demo_r_d3dens_custom_12052447/default/table?lang=en

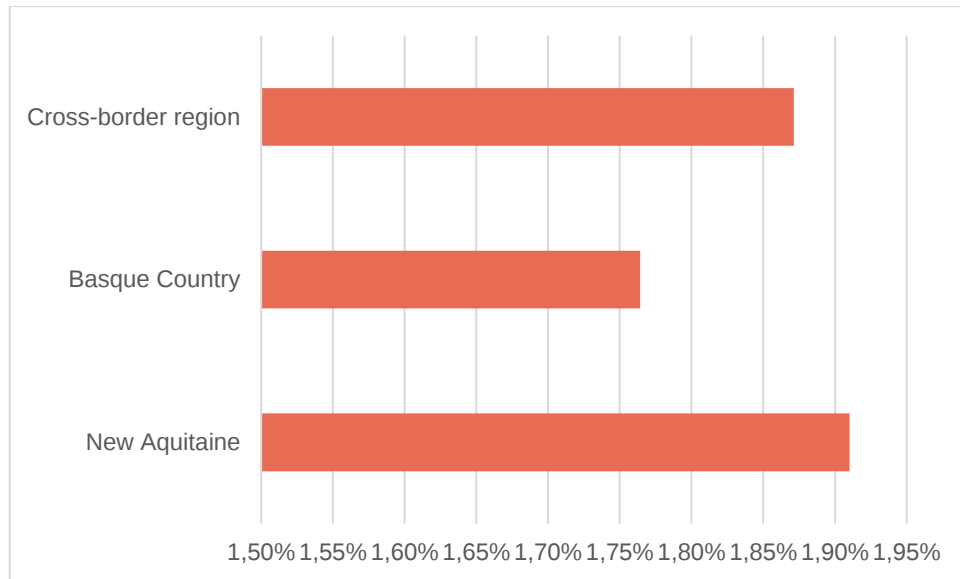


Figure 3: Population growth trend in New Aquitaine and Basque Country 2019-2023; unit: %

Own elaboration from EUROSTAT: <https://ec.europa.eu/eurostat/databrowser/view/tgs00096/default/table?lang=en>⁹

The demographic dynamics observed in the region result in very limited natural population growth, characterised by a relatively low birth rate and high mortality. Consequently, there is little potential for future growth. Additionally, the region has fewer young people compared to the European average, contributing to demographic ageing. According to data provided by the Euroregion, the percentage of people over 65 was 23.2% in New Aquitaine and 18.2% in Basque Country (NAEN, 2017).

Regarding employment, between 35% and 50% of the employment generated in the Euroregion is concentrated in companies with fewer than 20 employees. In New Aquitaine, this figure reaches 70%, while in the Basque Country, the highest share corresponds to companies with more than 100 workers, where 40% of the total workforce is employed, while only 33% is in this type of company in New Aquitaine. (Interreg Europe, s.f., pág. 28)

Data on employment per activity sector shows that services and industry are the two main sectors of the Euroregion. As indicated in Figure 4, those two sectors are even more relevant in the Basque Country while the construction sector and agriculture have a higher share in New Aquitaine, compared to the Spanish counterpart, with double and triple share of workers in these sectors, respectively.

⁹ Data for the cross-border region has been calculated based on aggregation

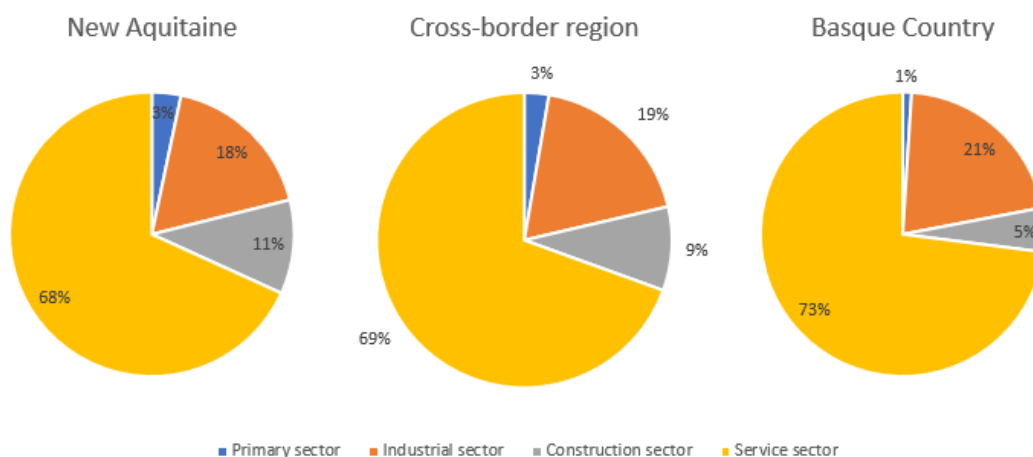


Figure 4: Workers sectoral distribution in the economy of New Aquitaine, Basque Country and the Cross-border region 2021; unit: %

Own elaboration from: INSEE (https://www.insee.fr/fr/statistiques/8201660?geo=REG-75&sommaire=8205898&g=Emploi+salari%C3%A9%20selon+le+secteur+d%27activit%C3%A9%20et+la+taille+d+e+la+zone+d%E2%80%99emploi+en+2020#ancr-EMP2_V1_ENS) and INE ([Ocupados por sector económico, sexo y comunidad autónoma. Valores absolutos\(4228\)](https://ine.es/jaxi/servlets/INEBase.do?_method=doAcceso&from=1&format=1&lang=es&path=1§or=1&tipo=1&valor=1)) (ine.es)

Public administration covers a significant share of employment within the services sector, reaching 25% of total employment in the Basque Country and 35% in New Aquitaine (NAEN, 2017). According to the interview conducted with “Proyecto de Empleo” (Employment project), around 13% of French residents who cross the border to work in Spain are employed within the service sector or as public officials (NAEN, 2017). “Recently we have also seen a new trend of young French specialists in engineering choosing the Basque Country as a place for their first job because the sector is more attractive”¹⁰. The French Employment Service also reported that Gipuzkoa’s industrial sector attracts an influx of skilled workers resident in France” (Interview – PES, France, 2024).

The study carried out within the framework of the Employment project analysed, on the basis of other studies developed at regional level, the prospects for the evolution of employment, including the prospects for the types of activity most in demand. The study concluded that in New Aquitaine the sector of activity with the greatest job creation will be the tertiary sector, with an average annual increase of 16,600 jobs and that, taking into account expected retirements, the number of jobs would be 5 times higher overall. The most recent estimates identify future growing needs for jobs related to home care, nurses, skilled professionals (painters, plumbers, bricklayers, carpenters, and industrial professionals), vehicle drivers, hotel and catering professionals, and salespeople.

In the Basque Country, studies carried out by Lanbide show that the volume of annual job opportunities will be around 11,241 jobs between 2023 and 2033, considering those arising from the expansion of the economy and the need for replacement due to retirements. In terms of the predominant sectors, as in New Aquitaine, the bulk will be in the service sector. Industry, on the other hand, will present opportunities for the replacement of workers due to retirement, although the expected economic development will lead to a contraction of jobs in this sector. The occupations that will concentrate the greatest long-term employment opportunities are catering and commercial workers, scientific and intellectual technicians and professionals in health and education, support technicians, accountants, clerical workers and skilled personnel in the primary sector.¹¹

Regarding employment rates, the data provided by Eurostat indicates that in 2023, the employment rate for New Aquitaine region was 70,7%, slightly higher than in the Spanish

¹⁰ Information from “proyecto de empleo” interview

¹¹ <https://futurelan.eus/es/>

counterpart. Focusing on the Spanish region, Figure 5 shows that the employment rate between 2019 and 2022 has slightly grown, likely driven by the significant job losses during the pandemic period. Gender disparity is shown in Figure 6 and represents the differences between the employment rates for men and women. Data shows a strong increase of the disparity after the pandemic, especially in the Basque Country. It means that most the increased workforce in recent years corresponds to men, while the rate for women remains constant.

A similar trend can be seen in the employment rate on the French side. Apart from the temporary decline observed around the time of the pandemic, in the last five years the employment rate has grown by approximately 3%. The gender gap in the workforce is undoubtedly smaller compared to the Spanish counterpart. Gender disparity in New Aquitaine has undergone a parallel trend to the Basque Country's in the first part of the period 2019-2023, but with a softer increase of disparity after the pandemic.

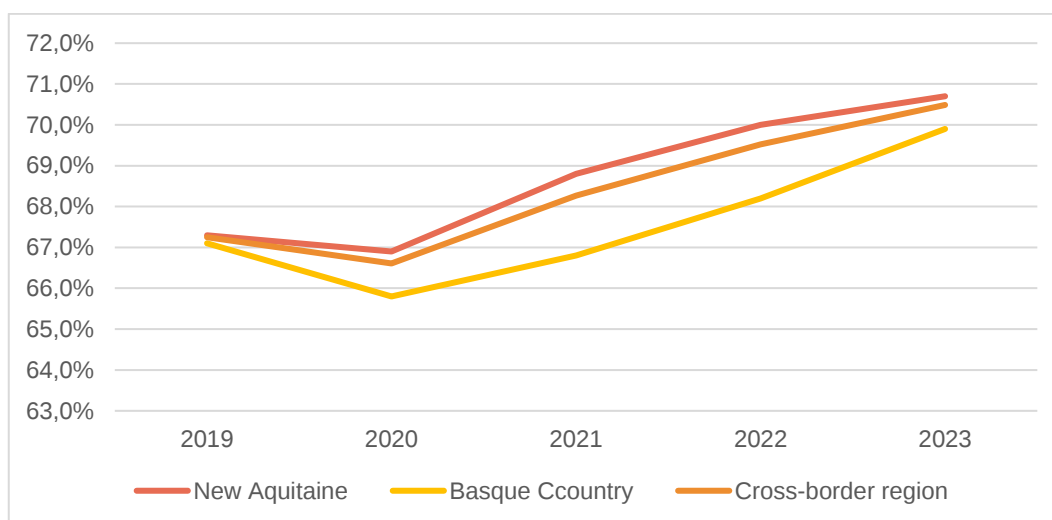


Figure 5: Employment rate for age 15-65, Basque Country vs New Aquitaine; unit: %

Own elaboration from:

https://ec.europa.eu/eurostat/databrowser/view/lfst_r_lfe2emprr_custom_12021742/default/table?lang=en¹²

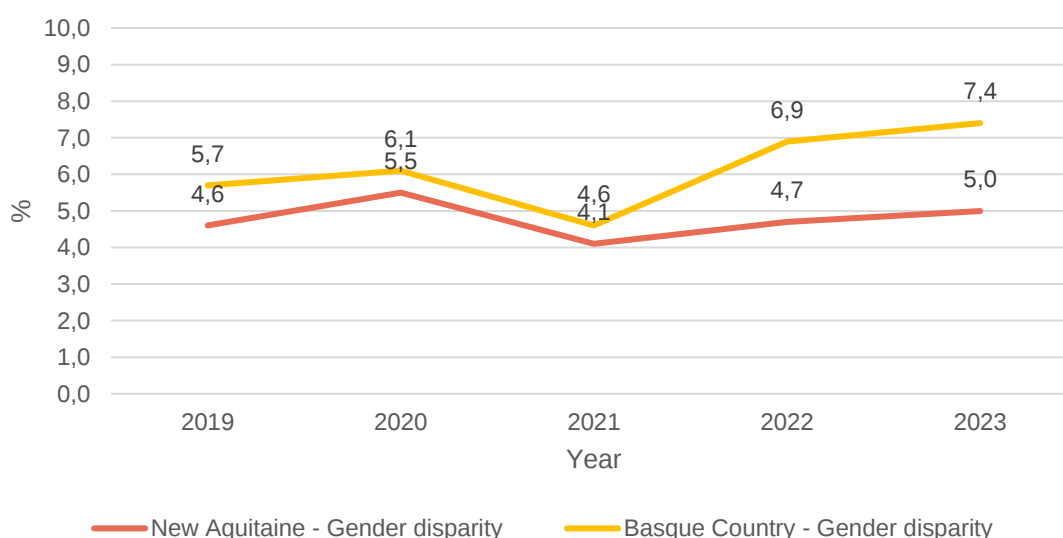


Figure 6: Gender disparity rate, male-female age 15-65 (2019-2023), Basque Country vs New Aquitaine; unit: %

Own elaboration from:

https://ec.europa.eu/eurostat/databrowser/view/lfst_r_lfe2emprr_custom_12021742/default/table?lang=en

¹² Data for the Cross-border region has been calculated based on employment-weighted average

The unemployment rate has decreased in the last five years in the Basque Country after initial growth during the pandemic. Regarding age, the age group 16-24 has the highest absolute unemployment rate, reaching proportions significantly higher during the pandemic compared to other analysed categories. In New Aquitaine the unemployment rate hovers around 20% for individuals aged up to 25 in New Aquitaine. In other age groups, 25-49 and over 50, the unemployment rate hovers at around 5%. Meanwhile, in New Aquitaine, the unemployment rate between men and women remains relatively constant in the French region, with a bias towards higher figures for men. In contrast, in the Basque Country, we find a higher unemployment rate for women. Overall the unemployment of the cross-border region generally lies between 8,9 and 11,6% as shown by Figure 7.

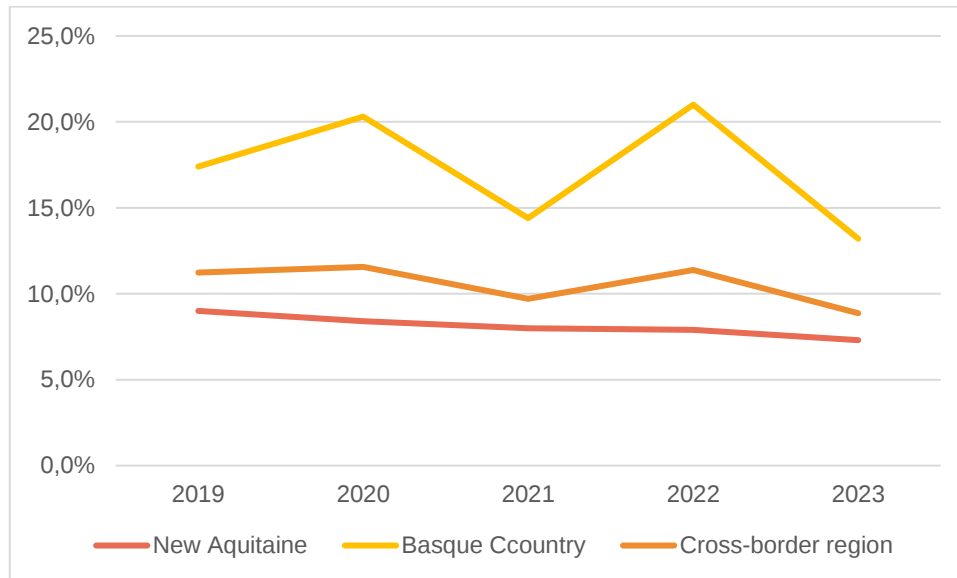


Figure 7: Unemployment rate of the population of age 15-64 in the Cross-border region, year 2019-2023; unit: %

Own elaboration from EUROSTAT data:

https://ec.europa.eu/eurostat/databrowser/view/lfst_r_lfur2qan_custom_12036605/default/table?lang=en, INE (https://www.ine.es/jaxi/Tabla.htm?path=/t20/p311/serie/base_2011/&file=01049.px) and INSEE (https://www.insee.fr/fr/outil-interactif/5367857/territoires/50_MTS/53_SRA)¹³

Hence, regarding the unemployment rate, which could be a driver for mobility, there are no significant differences in this indicator across borders, especially in the last years, where the indicator tends to equalise on both sides of the border.

It is worth noting that although the unemployment rate in New Aquitaine was 7.3% in 2023, the interviewee from the PES on the French border indicated a 5.9% unemployment rate in the French side of the cross-border region (Interview– PES, France, 2024). More precise data from the specific cross-border areas could be useful to refine the analysis.

A key factor to explain workers' flows is the difference in the average salary. The average gross annual wage in the Basque Country was EUR 28,084 in 2021, with an increase in the last five years of 16.2%. For New Aquitaine, data shows that between 2016 and 2020, the average salary increased by 10%. Unfortunately, there is no data available after 2020 that could allow us to see how salaries have evolved after the COVID-19 pandemic. Figure 8 below shows the evolution of the average gross annual salary in the Basque Country and in New Aquitaine as well as in the Cross-border region.

¹³ Data for the Cross-border region has been calculated based on employment-weighted average

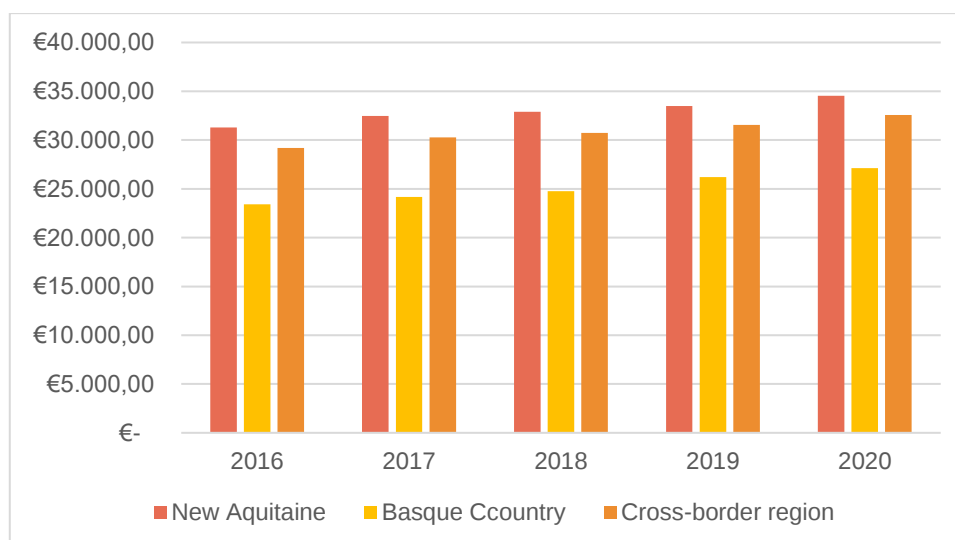


Figure 8: Average gross annual wages from main job in the Cross-border region; unit: EUR/year

Own elaboration from INE database (<https://www.ine.es/jaxiT3/Tabla.htm?t=28191>) and INSEE (<https://www.insee.fr/fr/statistiques/5404038>)¹⁴

These data show that the average gross salaries are significantly higher on the French side of the border, although they are increasing more rapidly on the Spanish side. Exploring differences in net salaries could provide valuable insights into worker movements. Indeed, during the interview conducted with the Proyecto Empleo, the interviewees mentioned that: “there is no salary lever between the countries, it exists only for jobs closely linked to the minimum wage, mostly in the construction sector, pushing a flow from Spain to France in this case”.

In addition to studying the average annual gross salary, another indicator that provides an interesting overview of differences between countries and regions is the national minimum wage (NMW). The NMW applicable in Spain is set by the Ministry of Labour and Social Economy, which for 2024 has been established at EUR 1,134 per month, based on 40 hours of work per week and 14 payments, and therefore amounting to EUR 15,876 annually (BOE, BOLETÍN OFICIAL DEL ESTADO, 2024). In France, the applicable NMW is established annually by the Ministry of Employment through Decree, and for the year 2024 amounts to EUR 1,766.92 per month, therefore EUR 21,203/year, based on a 35-hour workweek (Gouvernement, 2024). The difference is very significant, but it is worth noting that the NMW was at a very low level until 2018 (EUR 735.9/month) and has rapidly increased since then, so the current trend is to approach French levels.

While those crossing the border from France to Spain tend to have a relatively high level of education, the workers who cross the border from Spain into France typically have low educational qualifications, and they are attracted by the French minimum wage. This differentiating effect of wages does not exist for the average salary in more technical jobs or those requiring higher training or experience. In fact, in the latest obtained for 2023¹⁵, the average gross salary in Basque Country and Navarre is already beginning to exceed that of New Aquitaine. Therefore, mobility from North to South is influenced by net salary, effect of tax contributions and social security.

Another element of disparity is taxation, specifically the issue of where personal income tax is paid, and Social Security contributions are made. Social Security is paid at the place of work and income tax is paid at the place of residence according to the Double Taxation Convention. Social Security contributions are much higher in France than in Spain (18% or 20% of social security on the payroll in France, while in Spain, it is approximately 7%,

¹⁴ Data for the Cross-border region has been calculated based on employment-weighted average

¹⁵ Data From Euroregion interview

depending on the sector). In contrast, personal income tax is much lower in France than in Spain, especially in the Basque Country and Navarre where the personal income tax is higher than the Spanish average. These opposing differences would have a balanced net effect on the net salary and the purchasing power of two people living and working in the same country (the higher personal income tax compensates for the lower social security contribution, and vice-versa). However, for commuters, there is an imbalance in the net salary (after all taxes), which can amount to up to EUR 300-700 per month (Interview – EGTC, Spain 2024). From the perspective of the overall tax burden, it is more advantageous for a Spanish national to live in France and work in Spain than to live in Spain and work in France. (NAEN, 2017, pág. 106)

One additional aspect that contributes to hindering labour mobility is language. Knowledge of French or Spanish is usually required to work. In the Basque Country and Navarre educational systems, the choice of one foreign language is mandatory, but a second foreign language is optional, while in the French educational system, it is compulsory to choose two. Considering this significant difference, the percentage of students in New Aquitaine aged 11 to 18 (collège and lycée levels) studying Spanish as a foreign language represents 66% of the total enrolments recorded in the 2017 academic year, with 3.5% studying it as the first foreign language and 62.5% as the second foreign language. In the case of the Pyrénées-Atlantiques Department, based on data corresponding to enrolment in secondary education (collèges), 73% of students study Spanish as a foreign language (16% as the first foreign language and 58% as the second foreign language). The situation in the southern part of the Euroregion is quite different. In the 2016-2017 academic year, 16% of students aged 12 to 18 (secondary education and baccalauréat) studied French as a foreign language (3% as a compulsory subject and 13% as an elective subject). In Gipuzkoa, these percentages slightly increase to 19% of enrolled students (1% choosing French as a compulsory subject and 18% as an elective subject) (NAEN, 2017). It results in a greater knowledge of the Spanish language among the French people than the other way around, and this element favours north to south mobility, rather than the opposite direction (Interview – EGTC, Spain 2024). The EGTC Euroregion declared multilingualism as one of its key issues, and hence the EGTC invests in promoting the study of the three official languages spoken in the area. One of the actions taken by the Euroregion has been a schooling programme to train French- and Basque-speaking bilingual primary school teachers (Engl, October 2020).

More generally, regarding education and unemployment, it is necessary to identify skills needed throughout the region. For example, in Basque Country and Navarre, there is a lack of professionals who graduate from vocational training, while in New Aquitaine there are above the European average share of people who finish with a vocational training degree. In this sense, the interviewees identified the problems that exist with the recognition of vocational training titles.

The remaining territorial challenges identified in the Euroregion can be summarised as follows:

- Greater cooperation between New Aquitaine and the Basque Country would allow the area to function as an employment basin (Interview – EGTC, Spain 2024).
- The Euroregion, in the north-eastern area overlooking the sea, is heavily touristed. Job opportunities in this sector are high, and there is great potential that is currently unexpressed (PES, Spain, 2024).
- Lack of infrastructure as transport services: people are forced to move only by private means because there is a lack of connection infrastructures, such as bus or train lines that connect both sides. “Although there is not a very significant flow of individuals crossing the border daily, governments have recognised it as necessary and a priority to increase the infrastructural development of the area” (PES, Spain, 2024).

3. Cross-border policy framework

3.1. Governance structure and key actors of the labour market

New Aquitaine, the Basque Country and Navarre form an institutionally recognised Euroregion founded in 2011 based on Regulation (EC) no. 1082/2006, which created the European Grouping for Territorial Cooperation (EGTC). This institution collaborates with European institutions, such as the Interreg program, and with the French and Spanish governments to create greater cohesion and development. In this context, the strategic plan for 2014-2020 was first developed, followed by the strategic action plan for the Euroregion 2021-2027.

The governance structure of the Euroregion is based on two bodies that define the priorities and validate the strategy and action plan, with equal representation of the three regions (New Aquitaine, Basque Country, and Navarre). These bodies are the assembly, composed of 18 members and an executive committee with 6 members. The presidency is biannual, held alternately by each of the regions.

As regards the individual regions, focusing specifically on the labour market, the key actors in the regions of Navarre, Basque Country and New Aquitaine include various entities and organisations that play significant roles in shaping employment policies, regulations, and support systems:

- For New Aquitaine, the Regional Council (Conseil régional) works around five main axes, one of them being economic development and employment. The Regional Council oversees labour market policies, vocational training, and economic development initiatives (Conseil régional, s.f.). The French Public Employment Service (France Travail, former Pôle Emploi) operates at the national level but has regional branches and plays a critical role in connecting job seekers with employers (Pôle emploi, s.f.). Outside the governmental bodies, trade unions represent workers in the negotiation of labour conditions, with 8 main national-level trade unions (CGT, CFDT, FO, CFE-CGC, CFTC, UNSA, FSU, l'Union syndicale solidaire)¹⁶, while business interests are represented by 24 different employers' organisations¹⁷.
- In the Basque Country, the Department of Work and Employment takes charge of labour market policies, coordinates the Social Dialogue Table and manages actions that strengthen the social economy. To achieve its objectives, the Department relies on the Labour Inspectorate, the Basque Institute of Occupational Health and Safety-Osalan, and the Basque Public Employment Service-Lanbide (Departamento de Trabajo y Empleo Gobierno Vasco, s.f.). Vocational training is the responsibility of the Department of Education (Departamento de Educación Gobierno Vasco, s.f.). Regarding the workers' representation, the main trade unions in the Basque Country are ELA (Eusko Langileen Alkartasuna), LAB (Langile Abertzaleen Batzordeak), UGT (Unión General de Trabajadores) and CCOO (Comisiones Obreras). Their task is to defend and promote the interests of workers, and they have a key role in reconciling family and work, through collective bargaining. In turn, employers' interests are represented and defended by CONFEBASK (Confederación Empresarial Vasca), the main business organisation in the region.
- In Navarre, the Department of Social Rights, Social Economy and Employment holds regional competences in the areas of the right to social inclusion and

¹⁶ <https://www.cse-guide.fr/listing-des-syndicats-en-france/>

¹⁷ <https://syndicat-national-ge.fr/annuaire-groupement-employeur/#Aquitaine-Limousin-Poitou-Charentes>

guaranteed income, the promotion of active employment policies, information, guidance, training, support and labour integration, intermediation between employment supply and demand, the organisation of labour relations and the promotion of social dialogue, the promotion of health and safety conditions at work and social responsibility, the promotion of the social economy and self-employment, among others. The Navarre Employment Service-Nafar Lansare is an autonomous body attached to this department. (LEXNAVARRA, 2023) Vocational training policies and plans are the responsibility of the Department of Education (DECRETO FORAL 245/2023, 2023). In terms of trade unions, they are the same as in the Basque country, while CEN (Confederación Empresarial Navarra), formed by 49 business associations, is the main interlocutor for business.

Beyond the national and regional structures, the Euroregion acts as a coordinating body with the aim to promote economic, social, and cultural development of the cross-border territory, fostering exchange between the two sides of the border. To do so, it seeks to build on existing strengths and complementarities between regions, developing multi-annual plans that seek to generate synergies to help achieve better results in various thematic areas. The current strategic plan (2021-2027) builds upon 5 axes: (1) Euroregional citizenship, (2) smart, competitive, inclusive, and sustainable development, (3) territorial sustainability and cohesion, (4) cross-border governance and (5) advanced management of the Euroregion. All these axes are linked to mobility across borders, but axis 2 is especially related to the promotion of citizen skills and the effectiveness of Euroregional employment, while axis 1 addresses the promotion of multilingualism, which is one of the drivers for cross-border mobility (STRATEGIC PLAN OF THE EGTC, 2020).

3.2. Main policies and good practices from the cross-border region

Different formal agreements have been signed around the Euro-region to overcome some of the barriers or difficulties for cross-border commuters, such as:

- The Spanish–French agreement to avoid double taxation (BOE 12 June 1997, 1997): In the tax sphere, there is no Community provision that determines the taxation to be applied to cross-border workers. The current agreement, signed in 1995 between France and Spain, establishes the taxation of employment income in the State of residence. The agreement on double taxation considers a cross-border worker to be someone who justifies this quality through the possession of a border document created by a special agreement between the contracting States. The requirements for applying for recognition of the status of frontier worker are that the person has his/her habitual residence in one of the municipalities of the French border area included in the list included in the complementary agreement between Spain and France on frontier workers of 25 January 1961, and that he/she works as an employed person in one of the municipalities of Navarre included in this list. The problem is that the list of municipalities has not been changed since 1961, but in practice, the territory has changed. This lack of updates on the law has generated many doubts about the implementation of the agreement.
- Given the lack of initiative by the competent authorities in France and Spain, the Provincial Council of Gipuzkoa (Basque Country) in 1996 and more recently the Community of Navarre in 2011 (ORDEN FORAL 59/2011, 2011), have regulated this matter in their territorial area, establishing different requirements for the application of the frontier workers' regime. In the specific case of Gipuzkoa, the provincial government created a Register of Cross-border Workers by means of Provincial Decree 90/1996, of 10 December (DECRETO FORAL 90/1996, 1996), in which all those persons who wish to assert their status as cross-border workers must

register, with this registration being conditional upon the possession of the following requirements:

- Have your habitual residence in France.
- Obtain in the territory of Gipuzkoa salaries, wages or other remuneration derived from the exercise of work as an employee¹⁸
- Regularly return every day to your usual place of residence.

However, this procedure is not followed in the three regions, and despite the efforts of the regional governments to clarify the terms of the agreement, there are currently no common rules to grant the cross-border worker condition. Even within the Basque Country, other regions different from Gipuzkoa do not count with the Register of Cross-border Workers and use, instead, other criteria to define a cross-border worker. France, in turn, uses the list of municipalities included in the Franco-Spanish border area in accordance with the complementary agreement between France and Spain of 1961. In short, all the above highlights the need to clarify, streamline and update the conceptual and geographical delimitation of the term “cross-border worker”.

- Regarding the regulation of pension rights, a cooperation agreement was signed in 2017 by the French Caisse Nationale d'Assurance Vieillesse (CNAV), through CARSAT AQUITANE, and the Spanish National Social Security Institute (INSS). This agreement provides reciprocal support for the control of the INSS pensioners resident in France and the CNAV pensioners resident in Spain. This agreement frees pensioners from the obligation to submit an annual proof of life certificate to receive their pension (La revista de la seguridad social, s.f.).
- Derived from the home-office experience due to the pandemic and the closure of the borders, a group of countries, including Spain and France, signed the Framework Agreement on the application of Article 16(1) of Regulation (EC) No 883/2004 in cases of habitual cross-border teleworking (Regulation (EC) No. 883/2004, 2004). This Framework Agreement is only applicable to situations where both the state of the employer's seat and the state of residence are signatories to it, and work is divided between remote and on-site work. The fact that both countries have signed the agreement has facilitated the legal interpretation of many cases where teleworking complicated the situation of frontier workers. In particular, the Framework Agreement (Interview – EGTC, Spain 2024):
 - Allows an exception to article 13 § 1 a), which provides for affiliation to the Social Security scheme of the State of residence when a worker carries out a substantial part of his professional activity in that State and the rest of his activity in another State.
 - Only affects cross-border teleworking situations where teleworking represents less than 50% of the total working time (i.e. a maximum of 49%).
 - Can only be requested for a worker with a single employer or whose various employers are all established in the same country.
 - Does not apply to self-employed workers.

Regarding employment services, the recruitment services oriented towards job search are France Travail in France (formerly Pôle Emploi), Lanbide in the Basque Country and Nafar Lansare in Navarre.

According to the Empleo project report (NAEN, 2017) Pôle Emploi and Lanbide used to work together to support cross-border employment, but their actions were mainly focused

¹⁸ Data From Euroregion interview

on the Spanish side of the border. However, progress has somewhat stalled due to complications arising from data sharing issues, among other factors. This agreement pertains to a collaborative effort aimed at fostering mutual understanding, facilitating the exchange of insights, and similar objectives. France Travail is currently negotiating a similar agreement with the employment service in Navarre. (Interview – EGTC, Spain 2024).

Regarding information exchange between the French and Spanish employment services, “a data exchange agreement was studied and worked on, but never materialised” “This exchange of data could allow us to establish a diagnosis to better target the actions to be taken to support cross-border workers and to promote cross-border jobs among job seekers” (Interview – PES, France, 2024).

In addition to the formal arrangements set out above, there is POCTEFA project, a program for cross-border cooperation created to promote the sustainable development of the border territory of Spain, France, and Andorra. It co-finances cross-border cooperation projects designed and managed by stakeholders from both sides of the Pyrenees and the coastal areas participating in the Programme, preserving the intelligent, sustainable, and inclusive development of the territory. Within this program, we find the development of various projects:

- Employment Project 1: at the end of Employment Project 1, the coordinators from the Euroregion remained the contact point for cross-boundary workers. During 2019-2020, several information days were organised for cross-border workers with discussion tables composed of the Spanish and French Social Security Organisation, administrations responsible for taxes in Gipuzkoa (Basque Country), France and Navarre, and employment services from both sides of the border. The information days were aimed at workers, companies, and the organisations themselves (to see how they treated the issue differently). One of the objectives was to identify reference people in each entity, considering the problem that people are changing (now people who have been there for more than 20 years are retiring), and there was a need for updating.
A key result of the project was the network of contacts that the Euroregion could make with the organisations on both sides of the border, making it easier to find responses to the questions of cross-border workers. About 60-80 workers are received in a year to inform them about benefit issues (unemployment, retirement, Social Security, etc.), generic information before accepting a job on the other side of the border, problems with the recognition of qualifications such as vocational training, etc. (Interview – EGTC, Spain 2024).
- Employment Project 2: After completing the Employment 1 project in 2018, the network created with all public organisations was maintained. In this second project, which has presently been initiated, employment services will be the official partners of an event that the Euroregion plans to create soon. The main types of actions included in the project are:
 - Update of data from the 2017 study: Profiles of cross-border workers, analysis of changing trends, with the aim of trying to systematise this update, to have at least general data every year.
 - Create an observatory at the job offer level: Job demands, identification of complementary sectors/synergies and be able to develop a pilot action.
 - Consolidate the network of actors.
 - Signing of agreements to share data of jobs and job searchers. Production of information guides available on the web and the continued organisation of information days, webinars, etc.
- Training initiatives: one of the issues the employment services are working on is analysing potential complementarities and synergies between sectors on both sides

of the border to understand to what extent and in which sectors it makes sense to promote cross-border mobility. To solve this issue, an Interreg POCTEFA project called NAEN, “Development of cross-border training to facilitate professional integration in the Euroregional labour market”, is born. This project is aimed at promoting mobility and professional insertion in sectors with labour shortages in the Euroregion through the development of a qualified and specific offer adapted to cross-border realities. Specifically, four actions will be developed: the design of a cross-border administrative management module to promote and facilitate labour and commercial relations between the regions, the validation of competencies and certification of training, the design of a training course on technical vocabulary in the different languages for the administrative management and automotive sectors, and awareness-raising actions aimed at students and teachers to analyse professional development opportunities in the Euroregion.

- Pilot projects involving people with labour insertion difficulties. In New Aquitaine, right in the area closest to the border, many residents have difficulties integrating into the labour market. They are nationals, Spaniards, who cannot work in France because they do not speak the language. The objective of the project is to see how they could be encouraged to cross the border and accompany them in certain types of employment.
- Promoting the emergence of an integrated public transport network. This project facilitates access to transport networks by integrating ticketing systems and improves the information available through a cross-border mobility guide, enabling users to view all the transport offers in the territory. More generally, it aims to make multilingual passenger information more accessible in French, Basque and Spanish. (transfrontier, 2022)
- BlueSARE, a Euroregional collaboration project in the sector of Marine Renewable Energies: BlueSARE is a project supported by the Aquitaine-Basque Country Euroregion, which aims to promote the development of a Euroregional offer of marine renewable energies (MRE), which could position companies and institutions in the territory as an international benchmark in this emerging sector (BFP, BlueSARE, a Euroregional collaboration project in the sector of Marine Renewable Energies, 2021). Given the 870 km of coastline of the Euroregion, it holds a considerable potential for MRE practices. The project has generated a new marine energy value chain and related business opportunities, and it also promotes and strengthens cross-border collaboration between companies and technological bodies at Euroregional level.
- B-solutions’ third call for proposals: labour mobility is the most critical area directly affected by border obstacles. These hurdles have negative impacts, especially on frontier commuters, and they usually relate to a lack of cooperation between public employment services in border regions: difficulties in accessing general information and vacancies in the cross-border labour market; the recognition of diplomas and skills; taxation, social security and pension rights issues (BFP, b-solutions' third call for proposals: advice cases selected under "Employment", 2020).

4. Conclusions and recommendations

This section synthesises the key findings from the study, identifies the key strengths and weaknesses and provides recommendations to enhance the integration and efficiency of the cross-border labour market.

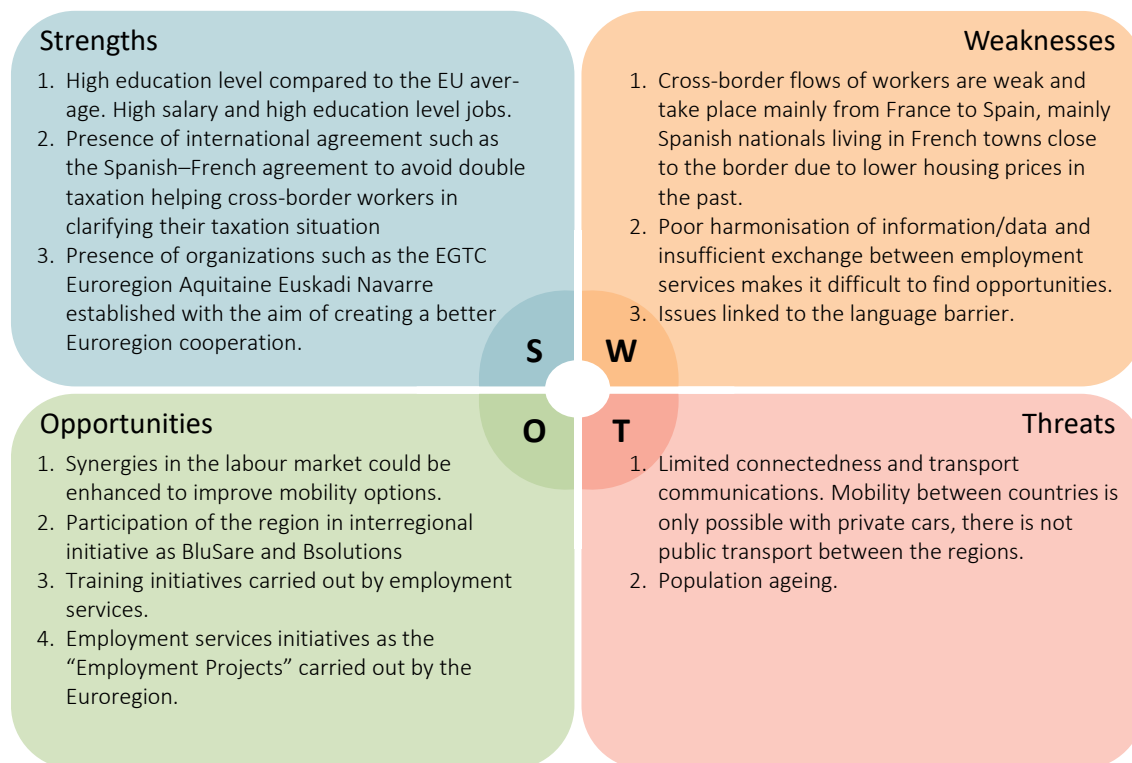


Figure 9: SWOT analysis

Source: own elaboration

4.1. Lessons learnt and improvement suggestions

The study carried out has allowed the characterisation of the Euroregion New Aquitaine – Basque Country – Navarre in terms of employment, with the identification of the drivers and hindering factors of mobility across borders.

Generally, the three regions share a trend towards demographic ageing, also observed in France and Spain as a whole, and similar unemployment rates. One of the strengths of the Euroregion is its high level of education, higher than the EU average, with a particularly high percentage of people with tertiary education on the Spanish side of the border. Regarding the labour markets of the three regions, there are some differences in terms of economic specialisation (greater weight of the service sector in New Aquitaine and of the industrial sector in the Basque Country and Navarre).

Despite the three regions’ geographic, cultural, and historical proximity, cross-border flows of workers in the Euroregion are weak and take place mainly from France to Spain. This mobility is very marked by the high number of people of Spanish nationality living in French towns close to the border because of the difference in housing prices in the 80’s and 90’s. Flows from Spain to France are scarcer and are more determined by employment opportunities. Additionally, although wage levels are increasingly similar on both sides of the border, there are significant differences in the minimum wage, which is higher in France, and this may attract lower qualified workers crossing in the south-north sense. Another driving factor might be the differences between France and Spain in direct tax rates and

social contributions, which also influence the choice of country of residence and country of work.

Among the weaknesses or obstacles to cross-border movements is the language barrier, especially for Spaniards who want to work in France. A low percentage of people who know French in the Basque Country and Navarre exist.

Secondly, there is an insufficiently developed transport network, with a lack of adequate public transport that forces commuters to use individual cars.

Another difficulty encountered is the administrative or fiscal obstacles involved in cross-border work, such as the existence of different requirements depending on the region for being considered a cross-border worker. Moreover, the national social security systems are not harmonised (criteria for granting benefits, access to health care, exportability of certain benefits, etc.), which may hinder cross-border mobility. In terms of agreements between the two countries, the prevailing frameworks remain antiquated.

Moreover, one of the main obstacles is the lack of adequate information for workers and insufficient coordination between competent administrations in the field of employment. There is also a lack of homogeneous and comparable statistical information on employment parameters, which hampers cooperation between cross-border employment-related institutions. At present, the Euroregion is actively engaged in data collection endeavours through research and interviews with the population, the findings of which will be published soon.

In short, despite the willingness of institutions at the Euroregion level to foster cooperation and make the most of synergies among the cross-border regions in terms of employment, in general, the progressive similarity in living and working conditions between northern Spain and south-western France means that the expected benefits in terms of wages or opportunities are limited and do not outweigh the administrative, economic and social disadvantages of cross-border mobility.

From the results and conclusions of the analysis, some recommendations can be derived to stimulate the movement of workers between the regions that make up the Euroregion:

- Promote the learning of the neighbouring language.
- Improve coordination in the field of apprenticeship and vocational training, seeking synergies and working on the homologation of professional qualifications.
- Improve the information provided to the population on employment opportunities on the other side of the border.
- Accompanying cross-border workers, helping them to resolve doubts and resolve the necessary formalities arising from their cross-border situation.
- Promote interaction between the tax and labour administrations of the three regions so that smooth collaboration can be developed between them, and in particular, increase collaboration between public employment services. This collaboration includes the development or review of agreements to harmonise procedures in both countries.
- Improve the availability and harmonisation of statistical information on the labour market in the three regions, allowing a more reliable monitoring of the evolution of the labour market.

4.2. Lessons learnt and improvement suggestions – Español

El estudio realizado ha permitido la caracterización de la Euroregión Nueva Aquitania-País Vasco-Navarra en términos de empleo, con la identificación de los impulsores y obstáculos a la movilidad transfronteriza. En términos generales, las tres regiones comparten una tendencia hacia el envejecimiento demográfico, también observado en Francia y España en su conjunto, y tasas de desempleo similares. Una de las fortalezas de la Euroregión es su alto nivel educativo, superior al promedio de la UE, con un porcentaje particularmente alto de personas con educación terciaria en el lado español de la frontera. En cuanto a los mercados laborales de las tres regiones, existen algunas diferencias en términos de especialización económica (mayor peso del sector de servicios en Nueva Aquitania y del sector industrial en el País Vasco y Navarra).

A pesar de la proximidad geográfica, cultural e histórica de las tres regiones, los flujos transfronterizos de trabajadores en la Euroregión son débiles y se producen principalmente de Francia a España. Esta movilidad está muy marcada por el alto número de personas de nacionalidad española que viven en ciudades francesas cercanas a la frontera, debido a la diferencia en los precios de la vivienda en los años 80 y 90. Los flujos de España a Francia son más escasos y están más determinados por las oportunidades laborales. Además, aunque los niveles salariales son similares en ambos lados de la frontera, existen diferencias significativas en el salario mínimo, que es más alto en Francia, y esto puede atraer a trabajadores menos cualificados que cruzan en sentido sur-norte. Otro factor impulsor podría ser las diferencias entre Francia y España en las tasas impositivas directas y las contribuciones sociales, que también influyen en la elección del país de residencia y del país de trabajo.

Entre las debilidades u obstáculos para los movimientos transfronterizos, está la barrera del idioma, especialmente para los españoles que trabajan en Francia, existiendo un bajo porcentaje de personas que conocen el francés en el País Vasco y Navarra. En segundo lugar, existe una red de transporte insuficientemente desarrollada, con falta de transporte público adecuado que obliga a los trabajadores a usar vehículos individuales.

Otra dificultad encontrada son los obstáculos administrativos o fiscales involucrados en el trabajo transfronterizo, como la existencia de diferentes requisitos dependiendo de la región para ser considerado trabajador transfronterizo. Además, los sistemas nacionales de seguridad social no están armonizados (criterios para la concesión de prestaciones, acceso a la atención médica, exportabilidad de ciertas prestaciones, etc.), lo que puede dificultar la movilidad transfronteriza. En términos de acuerdos entre los dos países, los marcos predominantes siguen siendo obsoletos.

Pero uno de los principales obstáculos es la falta de información adecuada para los trabajadores y la insuficiente coordinación entre las administraciones competentes en el campo del empleo. También existe una falta de información estadística homogénea y comparable sobre parámetros de empleo, lo que dificulta la cooperación entre las instituciones relacionadas con el empleo transfronterizo. En la actualidad, la Euroregión está activamente comprometida en esfuerzos de recopilación de datos a través de investigaciones y entrevistas a la población, cuyos hallazgos se publicarán pronto.

En resumen, a pesar de la voluntad de las instituciones a nivel de Euroregión de fomentar la cooperación y aprovechar al máximo las sinergias entre las regiones transfronterizas en términos de empleo, en general, la progresiva similitud en las condiciones de vida y trabajo entre el norte de España y el suroeste de Francia significa que los beneficios esperados en términos de salarios u oportunidades son limitados y no compensan las desventajas administrativas, económicas y sociales de la movilidad transfronteriza.

A partir de los resultados y conclusiones del análisis, se pueden derivar algunas recomendaciones para estimular el movimiento de trabajadores entre las regiones que conforman la Euroregión:

- Promover el aprendizaje del idioma vecino.
- Mejorar la coordinación en el ámbito de la formación profesional, buscando sinergias y trabajando en la homologación de cualificaciones profesionales.
- Mejorar la información proporcionada a la población sobre las oportunidades de empleo en el otro lado de la frontera.
- Acompañar a los trabajadores transfronterizos, ayudándolos a resolver dudas y resolver las formalidades necesarias derivadas de su situación transfronteriza.
- Promover la interacción entre las administraciones fiscales y laborales de las tres regiones, para que se pueda desarrollar una colaboración fluida entre ellas, y en particular, aumentar la colaboración entre los servicios públicos de empleo. Esta colaboración incluye el desarrollo o revisión de acuerdos para armonizar los procedimientos en ambos países.
- Mejorar la disponibilidad y armonización de la información estadística sobre el mercado laboral en las tres regiones, lo que permite un seguimiento más fiable de la evolución del mercado laboral.

4.3. Lessons learnt and improvement suggestions – Français

L'étude réalisée a permis la caractérisation de l'Euro-région Nouvelle-Aquitaine-Pays Basque-Navarre en termes d'emploi, avec l'identification des moteurs et des freins à la mobilité transfrontalière. En termes généraux, les trois régions partagent une tendance au vieillissement démographique, également observée en France et en Espagne dans leur ensemble, ainsi que des taux de chômage similaires. Une des forces de l'Euro-région est son niveau élevé d'éducation, supérieur à la moyenne de l'UE, avec un pourcentage particulièrement élevé de personnes ayant une éducation tertiaire du côté espagnol de la frontière. En ce qui concerne les marchés du travail des trois régions, il existe quelques différences en termes de spécialisation économique (plus grand poids du secteur des services en Nouvelle-Aquitaine et du secteur industriel au Pays Basque et en Navarre).

Malgré la proximité géographique, culturelle et historique des trois régions, les flux transfrontaliers de travailleurs dans l'Euro-région sont faibles et se déroulent principalement de la France vers l'Espagne. Cette mobilité est très marquée par le grand nombre de personnes de nationalité espagnole vivant dans des villes françaises proches de la frontière, en raison de la différence de prix des logements dans les années 80 et 90. Les flux de l'Espagne vers la France sont plus rares et sont davantage déterminés par les opportunités d'emploi. De plus, bien que les niveaux de salaire soient similaires des deux côtés de la frontière, il existe des différences significatives dans le salaire minimum, qui est plus élevé en France, ce qui peut attirer des travailleurs moins qualifiés traversant du sud au nord. Un autre facteur déterminant pourrait être les différences entre la France et l'Espagne en termes de taux d'imposition directs et de cotisations sociales, qui influent également sur le choix du pays de résidence et du pays de travail.

Parmi les faiblesses ou les obstacles aux mouvements transfrontaliers, il y a la barrière de la langue, notamment pour les Espagnols travaillant en France, avec un faible pourcentage de personnes connaissant le français au Pays Basque et en Navarre. Deuxièmement, il existe un réseau de transport insuffisamment développé, avec un manque de transports publics adéquats qui oblige les navetteurs à utiliser des voitures individuelles. Une autre

difficulté rencontrée est les obstacles administratifs ou fiscaux liés au travail transfrontalier, tels que l'existence de différentes exigences selon la région pour être considéré comme travailleur transfrontalier. De plus, les systèmes nationaux de sécurité sociale ne sont pas harmonisés (critères pour l'octroi de prestations, accès aux soins de santé, exportabilité de certaines prestations, etc.), ce qui peut entraver la mobilité transfrontalière. En termes d'accords entre les deux pays, les cadres prédominants restent désuets.

Mais l'un des principaux obstacles est le manque d'informations adéquates pour les travailleurs et une coordination insuffisante entre les administrations compétentes dans le domaine de l'emploi. Il existe également un manque d'informations statistiques homogènes et comparables sur les paramètres de l'emploi, ce qui entrave la coopération entre les institutions liées à l'emploi transfrontalier. À l'heure actuelle, l'Euro-région s'engage activement dans des efforts de collecte de données par le biais de recherches et d'entretiens avec la population, dont les conclusions seront bientôt publiées.

En bref, malgré la volonté des institutions au niveau de l'Euro-région de favoriser la coopération et de tirer le meilleur parti des synergies entre les régions transfrontalières en termes d'emploi, en général, la similitude progressive des conditions de vie et de travail entre le nord de l'Espagne et le sud-ouest de la France signifie que les avantages attendus en termes de salaires ou d'opportunités sont limités et ne compensent pas les inconvénients administratifs, économiques et sociaux de la mobilité transfrontalière.

Des résultats et conclusions de l'analyse, quelques recommandations peuvent être formulées pour stimuler le mouvement des travailleurs entre les régions composant l'Euro-région :

- Promouvoir l'apprentissage de la langue voisine.
- Améliorer la coordination dans le domaine de l'apprentissage et de la formation professionnelle, rechercher des synergies et travailler sur l'homologation des qualifications professionnelles.
- Améliorer l'information fournie à la population sur les opportunités d'emploi de l'autre côté de la frontière.
- Accompagner les travailleurs transfrontaliers, les aider à résoudre les doutes et à régler les formalités nécessaires découlant de leur situation transfrontalière.
- Promouvoir l'interaction entre les administrations fiscales et du travail des trois régions, afin qu'une collaboration fluide puisse se développer entre elles, et en particulier, accroître la collaboration entre les services publics de l'emploi. Cette collaboration inclut le développement ou la révision des accords pour harmoniser les procédures dans les deux pays.
- Améliorer la disponibilité et l'harmonisation des informations statistiques sur le marché du travail dans les trois régions, permettant un suivi plus fiable de l'évolution du marché du travail.

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Annex: List of interviewees

Country/region	Interviewee type	Date of the interview
Spain	Employment service	06/02/2024
Spain	Data Provider	12/02/2024
Spain	Employment service	08/02/2024
France	Employment service	29/02/2024
France	Data Provider	13/03/2024

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