



Faculty of Social and Human Sciences

**PhD Programme in Human Rights, Social Values and Ethics applied to
social reality**

**The role of social values in shaping a shared vision on
competitiveness for wellbeing. The case of the Basque
Country**

PhD Dissertation

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ESKERRAK

Marijo Arangureni, idazten dudana idazten dudala motz geratuko naiz, baina mila esker nigan nik baino gehiago sinesteagatik, tesi hau zure prioritate ere egiteagatik, nire lekua aurkitzen laguntzeagatik, eta lau urte hauetan partekatutako momentu guztiengatik. Benetan gozamina eta zorte bat izan da zurekin eskuz-esku lan egitea.

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Abstract

This dissertation explores the ways in which social values influence the construction of a shared vision in the field of competitiveness for wellbeing, using the case study Euskadi 2040, a regional visioning exercise in the Basque Country. Employing action research for territorial development methodology, a conceptual and analytical framework is developed, by integrating theoretical knowledge (which bridges social values and futures domain literature strands) and key experiential learnings from the case study. The framework is tested and elaborated further via mixed methods, utilising European Values Study data alongside qualitative analysis of the process. Findings reveal that social values limit preferable futures, and determine where, if any, the shared vision is positioned. The distribution of values across the population enables or disables the existence of a shared vision in the territory. The study identifies three key stages where values play a role: visioning values (influencing the process), vision values (shaping the outcome), and vision-action values (guiding implementation). Moreover, while the level of values—whether individual, organisational, or territorial—is significant, the role in the process of those who “own” these values, particularly as leaders or participants, also needs to be considered as it has differential impact. The societal alignment on visioning, vision and vision-action values is fundamental for the development of a truly transformative vision that sets the direction of the competitiveness for wellbeing model of the territory in line with the three main transitions.

Keywords: values; shared vision; competitiveness; wellbeing; futures

Resumen

Esta tesis explora de qué manera influyen los valores sociales en la construcción de una visión compartida en el ámbito de la competitividad para el bienestar, utilizando el estudio de caso Euskadi 2040, un ejercicio regional de construcción de una visión compartida para el País Vasco. Utilizando la metodología de investigación-acción para el desarrollo territorial, se desarrolla un marco conceptual y analítico, integrando el conocimiento teórico (que aúna las ramas de la literatura sobre valores sociales y futuros) y los aprendizajes experienciales clave del estudio de caso. El marco es testado mediante métodos mixtos, utilizando datos de la Encuesta Europea de Valores junto con un análisis cualitativo del proceso. Los hallazgos revelan que los valores sociales limitan los futuros preferibles y determinan dónde se posiciona la visión compartida, si la hubiera. La distribución de valores entre la población posibilita o inhabilita la existencia de una visión compartida en el territorio. El estudio identifica tres etapas clave en las que los valores juegan un papel: valores de visionado, valores de visión (que dan forma al resultado) y valores de visión-acción (que guían la implementación). Además, si bien el nivel de valores (ya sea individual, organizacional o territorial) es significativo, también debe considerarse el papel en el proceso de quienes “poseen” esos valores, en particular como líderes o participantes, ya que tiene un impacto diferencial. El alineamiento social en torno a los valores de visionado, visión y visión-acción es fundamental para el desarrollo de una visión

verdaderamente transformadora que marque la dirección del modelo de competitividad para el bienestar del territorio en línea con las tres grandes transiciones.

Palabras clave: valores; visión compartida; competitividad; bienestar; futuros

Laburpena

Doktoretza tesi honek gizarte-balioek ongizaterako lehiakortasunaren arloan bisio partekatu baten eraikuntzan nola eragiten duten aztertzen du, Euskadi 2040 kasua erabiliz, Euskadiren bisio partekatua eraikitzeke ariketa, lurralde mailan. Lurralde garapenerako ekintza-ikerketa metodologia erabiliz, esparru kontzeptual eta analitiko bat garatzen da, ezagutza teorikoa (balio sozialen eta etorkizunaren inguruko literatura adarrak biltzen dituen) eta kasuaren bitartez eginiko funtsezko ikasketa batzuk integratuz. Esparrua metodo mistoak erabiliz frogatu eta garatzen da, Europako Balioen Inkestaren datuak erabiliz prozesu kualitatiboaren azterketarekin batera. Ikerketak agerian uzten du balio sozialek hobetsitako etorkizunaren limite gisa funtzionatzen dutela eta bisio partekatua, halakorik balego, non kokatzen den zehazten dutela. Biztanleriaren artean balioen banaketak lurraldean bisio partekatu bat izatea ahalbidetzen edo desgaitzen du. Prozesuan hiru fase gako identifikatzen dira balioek eragin nabarmena dutenak: bisio eraikuntzaren inguruko balioak, bisio-balioak (emaitza moldatzen dutenak) eta bisio-ekintza-balioak (inplementazioa gidatzen dutenak). Gainera, balioen maila (banakakoa, erakundekoa edo lurraldekoka) esanguratsua den arren, balio horien "jabe" direnek prozesuan duten papera ere kontuan hartu behar da, batez ere lider edo parte-hartzaile gisa, eragin ezberdina duelako. Bisio eraikuntzaren, bisioaren, eta bisio-ekintzaren balioen inguruan gizarte-lerrokatzea ezinbestekoa da hiru trantsizio handiekin bat etorriz lurraldearen ongizaterako lehiakortasun-ereduaren norabidea ezartzen duen bisio partekatu eta benetan eraldatzaile bat garatzeko.

Hitz gakoak: balioak; bisio partekatua; lehiakortasuna; ongizatea; prospektiba

Index

List of tables	10
List of charts	13
List of figures.....	15
List of abbreviations and acronyms.....	17
Introduction	18
Object of study and its relevance	18
Research objectives and hypotheses	22
Structure of the dissertation	23
1. METHODOLOGY, METHODS AND THEIR ETHICAL DIMENSION	25
1.1. Methodology	26
1.1.1. Action research.....	26
1.1.2. Positionality of the researcher in the process	28
1.1.3. Validity.....	29
1.2. Methods	31
1.2.1. Conceptual framework development	31
1.2.2. Analysis: mixed methods.....	33
1.3. Ethical considerations	44
1.4. In short.....	47
2. STATE OF THE ART	48
2.1. Social values	49
2.1.1. Definition	49
2.1.2. Main characteristics	51
2.1.3. Classifications of values	53
2.1.4. Values measurement frameworks	53
2.1.5. Evolutionary modernization theory (Inglehart).....	59
2.1.6. Values: a generational perspective	63
2.1.7. Social values and wellbeing.....	67
2.1.8. Social values and competitiveness.....	74
2.1.9. In short.....	79
2.2. Futures domain.....	81
2.2.1. Terminological undefinition	81
2.2.2. Historical delimitation of the field	82

2.2.3. Epistemological approaches.....	84
2.2.4. Categories of futures	86
2.2.5. Complementarity between the futures and planning approaches.....	88
2.2.6. Foresight in the futures domain.....	89
2.2.7. Futures methods	91
2.2.8. In short.....	99
2.3. Social values in the futures domain	100
2.3.1. Fundamental, but understudied	100
2.3.2. Existing interactions.....	101
2.3.3. Social values and normative futures	106
2.3.4. In short.....	108
3. EUSKADI 2040: REGIONAL VISIONING IN THE BASQUE COUNTRY	110
3.1. Euskadi 2040 initiative	111
3.1.1. Project leadership	111
3.1.2. Key characteristics	112
3.2. The process of Euskadi 2040, from the optic of social values in the futures domain.....	114
3.2.1. Diagnosis.....	115
3.2.2. Shared visioning and backcasting	121
3.2.3. Shared agenda towards the shared vision	143
3.3. Key experiential learnings	146
3.4. In short.....	149
4. CONCEPTUAL-ANALYTICAL FRAMEWORK.....	150
4.1. Rationale for the framework.....	151
4.2. Values as limits of normative foresight	151
4.3. From a level-based paradigm into a level and role-based paradigm in the value holding subjects.....	156
4.4. Three stages in how values influence normative foresight processes	157
Stage 1: Visioning values.....	158
Stage 2: Vision values.....	159
Stage 3: Vision-action values.....	160
4.5. Influence of social values in shared visioning: a conceptual-analytical framework.....	161
5. ANALYSIS AND CONTRAST OF THE CONCEPTUAL-ANALYTICAL FRAMEWORK.....	162
5.1. Structure of the analysis	163
5.2. Visioning values	164
5.2.1. Quantitative perspective	164
5.2.2. Qualitative perspective.....	172

5.2.3. <i>Visioning values conclusions</i>	179
5.3. Vision values.....	181
5.3.1. <i>Quantitative perspective</i>	181
5.3.2. <i>Qualitative perspective</i>	201
5.3.3. <i>Vision values conclusions</i>	208
5.4. Vision- action values.....	210
5.4.1. <i>Quantitative perspective</i>	210
5.4.2. <i>Qualitative perspective</i>	237
5.4.3. <i>Vision-action values conclusions</i>	249
5.5. Contrast of the conceptual-analytical framework.....	250
6. CONCLUSIONS AND RECOMMENDATIONS	255
6.1. Main results and contributions.....	256
6.2. Implications and recommendations	261
6.3. Further research	265
Bibliography	267
Appendix I Leader's questionnaire	296
Appendix II Table of equivalences EVS 2008 and 2017-2019 waves	304
Appendix III Presentation example	306
Appendix IV Document factsheets.....	307
Appendix V Vision Statement (Spanish)	310
Appendix VI Panel of indicators (Spanish)	322
Appendix VII Letter of informed consent.....	329

List of tables

Table 1.1 Validity (Karlsen & Larrea, 2015).....	30
Table 1.2 Overview of social values subjected to analysis.....	37
Table 1.3 Equivalence of generation with birth years employed for the analysis	38
Table 1.4 Typologies of participant observation.....	39
Table 1.5 The differences and similarities between the observer and co-generation positions (Karlsen & Larrea, 2018)	40
Table 1.6 Overview of number of contrast sessions per process phase.....	41
Table 1.7 Themes, categories and subcategories with their respective logic	44
Table 2.1 Values definitions by chronological order	49
Table 2.2 Hofstede's cultural dimension definitions	54
Table 2.3 Delimitation of generations	64
Table 2.4 Characteristics of each generation.....	65
Table 2.5 Three categories of futures by Roy Amara (1972, 1974,1981)	86
Table 2.6 Characteristics of forecasting, strategic and applied foresight.....	90
Table 2.7 Summary of value models by level.....	104
Table 3.1 Foresight "style" of the Euskadi 2040 initiative	112
Table 3.2 Overview of multi-level sessions with participants.....	126
Table 3.3 Summary of inputs at bilateral meetings during the multi-level visioning process by contributor regarding the vision in general	128
Table 3.4 Summary of inputs at bilateral meetings during the multi-level visioning process by contributor to the specific challenges	128
Table 3.5 Summary of inputs during multi-actor visioning process by contributor regarding the vision in general	135
Table 3.6 Summary of inputs during the multi-actor visioning process by contributor to the specific challenges	135
Table 3.7 Summary of inputs during interdepartmental visioning process by contributor regarding the vision in general.....	137
Table 3.8 Summary of inputs during the interdepartamental visioning process by contributor to the specific challenges.....	138
Table 3.9 Euskadi 2040 Objectives.....	142
Table 3.10 Examples of leveraging bets of Euskadi 2040	143
Table 3.11 Evidence-based key learnings.....	146
Table 4.1 Analytical factors by type of method.....	154

Table 4.2 Conceptual-analytical framework.....	161
Table 5.1 Locus of control descriptives by country and time	165
Table 5.2 Locus of control descriptives by country and gender.....	166
Table 5.3 General trust descriptives by country and time	168
Table 5.4 General trust descriptives by country and gender	168
Table 5.5 Trust in government descriptives by country and time.....	170
Table 5.6 Trust in government descriptives by country and gender	170
Table 5.7 Locus of control and general trust comparison between leaders and territory	171
Table 5.8 Visioning values qualitative analysis overview	172
Table 5.9 Visioning values citation distribution by role in the process.....	172
Table 5.10 Country's objectives in 10 years in Euskadi (2019)- Part 1	183
Table 5.11 Country's objectives in 10 years in Euskadi (2019)- Part 2	183
Table 5.12 Postmaterialist index (4-item) in Europe and Euskadi.....	184
Table 5.13 Adequacy of competition descriptives by country and time.....	189
Table 5.14 Adequacy of competition descriptives by country and gender	190
Table 5.15 Individual vs state responsibility for providing livelihoods descriptives by country and time	192
Table 5.16 Individual vs state responsibility for providing livelihoods descriptives by country, time and gender	193
Table 5.17 Preferred welfare state provisions descriptives by country.....	195
Table 5.18 Preferred welfare state provisions descriptives by country and gender	196
Table 5.19 Territorial and leader's post materialism index values – Part 1	198
Table 5.20 Territorial and leader's post-materialism index values – Part 2	199
Table 5.21 Territorial and leaders' adequacy of competition value	201
Table 5.22 Territorial and leaders' preferred welfare provisions.....	201
Table 5.23 Vision values qualitative analysis overview	202
Table 5.24 Vision values citation distribution by role in the process.....	202
Table 5.25 Leadership preferable values evolution	204
Table 5.26 Summary vision characteristics values by participants	205
Table 5.27 Evolution into the resulting Euskadi 2040 vision dimensions.....	207
Table 5.28 Environmental protection vs. personal income descriptives by country and time.....	212
Table 5.29 Environmental protection vs. economic growth and job creation descriptives by country and time	213

Table 5.30 Environmental protection vs. personal income descriptives by country and gender	213
Table 5.31 Environmental protection vs. economic growth and job creation descriptives by country and gender.....	214
Table 5.32 Good/bad decrease work importance descriptives by country and gender	224
Table 5.33 Immigrants (not) strain on welfare system descriptives by country and time	226
Table 5.34 Immigrants (not) strain on welfare system descriptives by country and gender.....	227
Table 5.35 Immigrants (not) maintain customs descriptives by country and time	229
Table 5.36 Immigrants (not) maintain customs descriptives by country and gender	230
Table 5.37 Importance of speaking the language descriptives by country and time	232
Table 5.38 Importance of speaking the language descriptives by country and gender	233
Table 5.39 Territorial and leaders' environmental vision-action values	234
Table 5.40 Territorial and leaders' importance of life aspects values	235
Table 5.41 Territorial and leaders' importance of job qualities.....	235
Table 5.42 Territorial and leader's good/bad work importance decrease	236
Table 5.43 Territorial and leaders' environmental vision-action values	236
Table 5.44 Vision-action values qualitative analysis overview.....	237
Table 5.45 Vision-action values citation distribution by role in the process	237
Table 5.46 Contrasted conceptual-analytical framework	252

List of charts

Chart 5.1 Evolution of locus of control distribution in Euskadi	166
Chart 5.2 Locus of control descriptives (mean) by country and generation	167
Chart 5.3 General trust descriptives by country and generation	169
Chart 5.4 Trust in government descriptives (mean) by country and generation	171
Chart 5.5 Importance of high economic growth by country (% , 2017-2019).....	185
Chart 5.6 Qualities that children should learn at home in Euskadi (% , 2008 and 2019)	186
Chart 5.7 Qualities that children should learn at home in Euskadi by gender (% , 2019).....	187
Chart 5.8 Qualities that children should learn at home in Euskadi by generation (% , 2019)	188
Chart 5.9 Qualities that children should learn at home by country (%)	188
Chart 5.10 Evolution of distribution of adequacy of work	190
Chart 5.11 Adequacy of competition descriptives (mean) by country and generation.....	191
Chart 5.12 Evolution of distribution individual vs state responsibility	193
Chart 5.13 Individual vs state responsibility for providing livelihoods descriptives (mean) by country, time and generation.....	194
Chart 5.14 Preferred welfare state provisions (mean) by country and generation.....	197
Chart 5.15 Territorial and leaders' preferred qualities that children should learn at home (%)	200
Chart 5.16 Evolution of distribution of environmental protection vs. income in Euskadi	212
Chart 5.17 Environmental protection vs. personal income descriptives (mean) by country and generation (2017-2019).....	215
Chart 5.18 Environmental protection vs. economic growth and job creation descriptives (mean) by country and generation	215
Chart 5.19 Importance of life aspects descriptives (mean) by country and time	216
Chart 5.20 Importance of life aspects descriptives (mean) by country and gender	218
Chart 5.21 Importance of life aspects in Euskadi evolution (mean) by generation	219
Chart 5.22 Importance of job qualities in Euskadi by time (%).....	220
Chart 5.23 Importance of job qualities by country (% , 2017-2019).....	221
Chart 5.24 Importance of job qualities in Euskadi by gender (% , 2017-2019).....	222
Chart 5.25 Importance of job qualities in Euskadi by generation (% , 2017-2019).....	223
Chart 5.26 Good/bad decrease work importance descriptives (mean) by country and generation	225
Chart 5.27 Evolution of distribution of immigrants (not) strain on welfare system	227
Chart 5.28 Immigrants (not) strain on welfare system descriptives (mean) by country and gender.....	228

Chart 5.29 Evolution of distribution of immigrants (not) maintain customs	230
Chart 5.30 Immigrants (not) maintain customs descriptives (mean) by country and generation....	231
Chart 5.31 Evolution of distribution of importance of speaking the language	232
Chart 5.32 Importance of speaking the language descriptives (mean) by country and gender	233

List of figures

Figure 0.1 Dissertation structure by chapter and specific objectives addressed	24
Figure 1.1 Co-generative model of ARTD (Karlsen & Larrea, 2014).....	27
Figure 1.2 Quantitative and qualitative analysis relationship positions	34
Figure 1.3 Chronology of qualitative analysis	39
Figure 1.4 Atlas.ti 24 software screenshot	42
Figure 1.5 Euskadi 2040 qualitative analysis word cloud.....	43
Figure 1.6 Overview of methodology and methods by chapter	47
Figure 2.1 Cultural onion by Edgar Schein	51
Figure 2.2 Circular structure of the ten basic values by Schwartz	56
Figure 2.3 Similarities between Inglehart, Schwartz and Hofstede frameworks (by Kaasa).....	58
Figure 2.4 The Inglehart-Welzel World Cultural Map 2023	60
Figure 2.5 Economic Development and Value Change World Map	62
Figure 2.6 Values Influencing the Sources of Subjective Wellbeing	70
Figure 2.7 European and American welfare values (Walker,2008).....	73
Figure 2.8 Economic effects of culture (Roland, 2020)	77
Figure 2.9 Culture and place-based development (Huggings & Thompson, 2015)	78
Figure 2.10 Evolution of the futures domain (Kuosa, 2012)	83
Figure 2.11 Typology of five evolving futures approaches (Gidley, 2017).....	85
Figure 2.12 The Futures Cone	87
Figure 2.13 Foresight Diamond (Popper, 2008)	92
Figure 2.14 Foresight framework, with representative methods (Voros, 2003).....	92
Figure 2.15 Six pillars of futures studies, with representative methods (Inayatullah, 2008)	93
Figure 2.16 Visioning process by the Manoa school (Dator, 2019)	97
Figure 2.17 Shared vision visualization (MDT, 2010)	99
Figure 2.18 Competing Values Framework (Cameron & Quinn, 2006)	103
Figure 3.1 Roles of the driving group of Euskadi 2040.....	112
Figure 3.2 Euskadi 2040 process timeline	114
Figure 3.3 The diagnosis triangle	115
Figure 3.4 Competitiveness for wellbeing framework	116
Figure 3.5 Euskadi 2040 Futures trend diagnosis list.....	119
Figure 3.6 Competitiveness keys from the past.....	120

Figure 3.7 First version developed by researchers.....	122
Figure 3.8 Second version developed by policymakers	123
Figure 3.9 Leader's first joint proposal for the Vision Euskadi 2040	125
Figure 3.10 Multi-level visioning and backcasting: institutions involved	125
Figure 3.11 Euskadi 2040 Vision statement	140
Figure 3.12 Provincial government Mandate plan dimensions alignment with Euskadi 2040	145
Figure 4.1 Futures cone (Voros, 2022)	152
Figure 4.2 Examples of distribution of the postmaterialist index	153
Figure 4.3 Shared vision value-distribution types	154
Figure 4.4 Visualisation of value distributions in the Future Cone	155
Figure 4.5 Level and role-based paradigm visualization.....	157
Figure 4.6 Three stages of the ways social values influence normative foresight.....	157
Figure 5.1 Analysis steps visualization summary.....	163
Figure 5.2 Visioning values and process role Sankey diagram	173
Figure 5.3 Vision values and process role Sankey diagram	203
Figure 5.4 Vision-action values and process role Sankey diagram	238
Figure 5.5 Evolved three stages of the ways social values influence normative foresight	253

List of abbreviations and acronyms

ARTD	Action research for territorial development
CAQDAS	Computer Assisted Qualitative Data Analysis Software
CLA	Causal Layered Analysis
EU	European Union
EU-27	27 countries of the European Union
EUDEL	Association of Basque municipalities
EUSTAT	Basque Institute of Statistics
EVS	European Values Study
GDP	Gross domestic product
HR	Human Rights
IJAR	International Journal of Action Research
IPBES	Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services
NIMBY	Not in my backyard
OECD	The Organization for Economic Cooperation and Development
OHCHR	Office of the High Commissioner for Human Rights
RIS3	Research and Innovation Smart Specialisation Strategy
RSA	Regional Studies Association
SME	Small and medium enterprises
STI	Science, Technology and Innovation
SWB	Subjective wellbeing
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organization
USA	United States of America
WVS	World Values Study
ZAP	Preferred Action Areas

Introduction

Object of study and its relevance

An aging population, the rise of artificial intelligence and quantum computing (among other emerging technologies), the intensifying impact of climate change, and the polarisation of society are only a few of the phenomena, already present today, and expected to highly impact our futures.

The world is experiencing unprecedented uncertainty, volatility, and rapid change (Tse & Esposito, 2017). Complexity is the norm rather than the exception in contemporary systems (Tonurist & Hanson, 2020), and events once deemed impossible now define our reality (Pohl, 2023). This hyperconnected and interdependent global context has been starkly highlighted by recent crises, including socio-sanitary, energy, economic, political, and humanitarian disruptions. Simultaneously, human action continues to push against environmental thresholds, driving the climate crisis to a critical juncture.

The urgency to address three global transitions—technological-digital, energy-climate, and socio-demographic—has significantly accelerated. Although certain structural elements persist, the contemporary futures field recognises that the future is not predetermined. Instead, it emphasises the potential for human agency to influence and, to some degree, direct the future trajectories. Public policies and governments play a central role in tackling these challenges, as evidenced by initiatives such as the European Green Deal, the Just Transition Mechanism, and policies fostering smart specialisation strategies (S3). These approaches aim for economic growth that is not only innovative but also equitable and sustainable.

The shift is also evident in academic discourse, where critiques of classical economic paradigms have gained momentum. Alternative metrics like Amartya Sen's Human Development Index, the United Nations (henceforth, UN) Sustainable Development Goals, and the OECD's Better Life Index emphasise dimensions beyond mere economic progress (OECD, 2020). This evolving narrative underscores the importance of competitiveness framed within a broader agenda of wellbeing and sustainability.

Similar to many other regions around the globe, the Basque Country faces significant need for transformation, including reshaping the business fabric to align with climate neutrality and sustainability standards, and the responsibility to ensure the wellbeing of both current and future generations. Addressing these complex issues necessitates transformative public policies that go beyond conventional planning methods, alongside the establishment of broad social consensus to support these efforts.

In this context, the transformative research project “Competitiveness for Inclusive and Sustainable Wellbeing for the Future of Euskadi post Covid-19” (hereinafter, 'Euskadi 2040'), in which this dissertation is based, was initiated. It is a collaborative research project developed by the Orkestra-Basque Institute of Competitiveness (the research institute, I, the author of this dissertation work for), in conjunction with the Basque Government (concretely, Presidency and the Department of Economic Development, Sustainability and Environment). The overarching objective of the project was: **to identify what the main competitiveness challenges of the Basque Country are, and how they are evolving, in order to build a sustainable and inclusive wellbeing model for the next generation.** From this objective arise several key concepts that require clarification, which are outlined below.

Competitiveness for inclusive and sustainable wellbeing

A comprehensive analysis of the concept of competitiveness for inclusive and sustainable wellbeing falls beyond the scope of this study. Still, a working definition is required and provided below to orient the reader and clarify the intended use of the term within the Euskadi 2040 case and this research. Inclusive and sustainable wellbeing has been defined as:

“The result of a systemic and dynamic process by which all individuals within a society have their fundamental human needs met, enabling them to realise their full potential as individuals, collaboratively building the future they want for their territory, in a sustainable way over time and in solidarity with the rest of the inhabitants of the planet, among all the actors of their community” (Aranguren Querejeta & Canto Farachala, 2021, p. 8).

Competitiveness is an abstract concept, which complicates its definition (Ketels, 2016, p. 7). When defining competitiveness in relation to inclusive and sustainable wellbeing, Wilson (2021) provides a brief overview of the evolution of the concept in both academic literature and public policies. In its colloquial usage, competitiveness is often understood as the ability to outperform others. This definition aligns well with business competitiveness, where firms seek to be more competitive than their counterparts. However, “the competitive dynamics of territories unfold within the need to balance a wide range of interests in pursuing various dimensions of success, making the win-lose dynamic of competition far less relevant and much more difficult to assess” (Wilson, 2021, p. 39).

This dissertation focuses on territorial competitiveness, a concept popularised primarily by Porter in the 1990s. Within the territorial framework, which extends beyond cost efficiency to emphasise value creation and productivity, the study adopts a subnational perspective, specifically regional competitiveness. It is essential to note that regions are not smaller-scale versions of national competitiveness; rather, they are structurally distinct (Ketels, 2016, p. 11) and have the capacity to select their own specific strategic positions (Valdaliso & Wilson, 2015).

While the concept of competitiveness inherently carries an economic logic, alternative perspectives have emerged advocating for a broader scope that transcends purely economic considerations (beyond GDP approaches) (Wilson, 2021). These perspectives emphasise a more holistic understanding of competitiveness. It is from this comprehensive viewpoint that this dissertation

approaches competitiveness, considering it as the process (particularly highlighting its economic dimension) that enables and fosters inclusive and sustainable wellbeing¹.

The next generation

The objective of Euskadi 2040, in addition to introducing the concept of competitiveness for wellbeing, also highlights the need to work toward the wellbeing of the next generation of the region. The World Commission on Environment and Development already warned in 1987, that the acts or omissions of current generations widely impact the rights and liberties of future generations. Thus, the responsibility of current generations towards ensuring future wellbeing has increasingly been recognised as a function of futures studies (Fitzgerald & Davies, 2022), together with a human rights (henceforth, HR) issue.

Given the urgency of the climate crisis, the legal question in vogue is how should the interests of Future Generations be protected (Düwell & Bos, 2016; Page, 2006; Szabó, 2023; Tremmel, 2009). Building on earlier frameworks like the 1997 UNESCO Declaration, the 2021 UN report *Our Common Agenda* proposed two main mechanisms:

- The **integration of long-term intergenerational thinking in policymaking**. Tools include the conduction of future impact assessment of policies and programmes, the incorporation of foresight experts in the UN system, megatrend analysis, and collaboration with wider communities of stakeholders to boost strategic foresight.
- On the other hand, the **representation of future generations interests in decision-making**. Tools could include the establishment of Declaration on Future Generations and, in terms of institutions, the creation of Committees or Commissioners for Future Generations. These institutions could guarantee the interests of future generations by being embedded in policy processes, a much more viable and guaranteeing option than limiting the protection of the interests to the judiciary arena (Düwell & Bos, 2016, p. 246). There are already examples at the national level of such measures, such as the Hungarian Ombudsman for Future Generations (Szabó, 2023).

Although the UN mandate was non-binding, Euskadi 2040 responds to the first line of action by incorporating the next generation into the logic of the development of the competitiveness for wellbeing model. More recently, on the 22nd of September 2024, although not without reluctance from certain countries, the UN General Assembly adopted the Pact for the Future, including a Global Digital Compact and a Declaration on Future Generations. The latter points out at strategic foresight, multi-stakeholder cooperation and a whole-of-government approach as important actions to be carried out in order to achieve the protection of future generations.

Euskadi 2040 project is, therefore, congruent with numerous international logics, encompassing the economic sphere (the beyond-GDP movement through the promotion of competitiveness for wellbeing) and the protection of wellbeing of future generations, following HR principles and regulations.

¹ The expression “competitiveness for wellbeing” will be employed throughout the dissertation as a short form synonym of competitiveness for inclusive and sustainable wellbeing as defined in this section.

The construction of a shared vision and the influence of social values

This being said and going back to the main objective of the project, which was to identify the competitiveness challenges for the inclusive and sustainable wellbeing model for the next generation. However, as members of the research team leading the Euskadi 2040 project, it soon became apparent that prior to identifying the challenges, it was imperative to define the desired future wellbeing model, since the challenges would depend on the preferred wellbeing model selected.

Thus, as a research team we started to work on identifying the desired shared vision for the future of the territory in order to identify the existing competitiveness challenges to achieve it. Shared visions are pragmatic tools that allow territories to define their own preferable trajectories. In this context, **there is a growing need to understand how visions guiding collective action are developed or constructed** (Sotarauta & Beer, 2021).

In the process of establishing a shared vision of competitiveness for wellbeing for the Basque Country, it became evident that there existed disparate conceptions of the territory's optimal future trajectory, and that this, in addition to the particular interests of the different stakeholders, could be linked to a diversity of values existing in the territory. As Kuosa (2011, p. 331) previously observed engaging in visioning involves "taking its stance on different alternatives and describing its own desired futures images, instead of aiming for value neutralism".

Taking a stance and avoid value neutralism (if it exists) raises a multitude of critical questions: How do we define what is preferable? Who decides it? Whose values are we following, and therefore, whose vision are we developing? How can we ensure that all values are reflected in the process and that power imbalances are mitigated in the visioning exercise?

Drawing on literature, we found that, values, although relatively stable over the short term (R. Inglehart & Welzel, 2005a; Schwartz, 2006), do evolve over time (Jenkin, 2016; Pettersson & Esmer, 2008a; Sen, 2004). Generational shifts reveal trends such as increasing individualism, post materialism, conformism, and a growing tendency toward immediacy (T. Francis & Hoefel, 2018; R. Inglehart & Welzel, 2005a). This resonated with the concerns voiced by some policymakers and economic stakeholders during the Euskadi regional visioning exercise over a perceived decline in proactive ambition and a growing preference among younger generations, who opted for secure and long-term stable positions (Murcia, 2021). Additionally, there is evidence of a diminishing emphasis on the value of work, accompanied by a rising prioritisation of leisure and free time (Lozano, 2020; Reinicke, 2022). This reconfiguration of values could have implications for the future competitiveness for wellbeing model pursued in the region.

As noted in the futures domain literature, social values are inherently present in "every approach to futures studies" (E. Masini, 2006, p. 1163), and more prominently so than in other disciplines (Mannermaa, 1986). Kuosa (2012) highlights that "creating visions and studying values" lies at the core of futures studies. Amara (1991) even suggests that making values explicit is a **quality criterion** when conducting research in the field of futures.

The existence of a connection between values and futures (particularly normative futures) is undeniably recognised. Nevertheless, there is a significant absence in the extant literature concerning the specific values that influence the formation of shared visions and the manner in which they influence the process. For this purpose, the main aim of this dissertation is to **bridge different strands of the literature (on social values and futures domain) in order to develop a new integrated framework explaining the impact of social values in shared visioning exercises in the field of competitiveness for wellbeing.**

The developed framework has a dual function: on one hand, advancing the theoretical knowledge frontier on this fundamental yet understudied intersection between social values and futures domain, which would pave the way for higher-quality futures research (following Amara's argument); and on the other hand, from a pragmatic standpoint, to enhance the capacity to build a shared vision for the Euskadi region that aligns more closely with its values, and thus, has the potential to be more transformative, moving toward a more desirable future.

Research objectives and hypotheses

After having justified the topic of the dissertation, its relevance and its connection with the HR corpus, the **general objective** of the dissertation is summarised as follows:

"To understand how social values influence shared vision development processes in the field of competitiveness for wellbeing".

In order to achieve the general objective, six **specific objectives**, also known as operative objectives or intermediary intellectual objectives, are enumerated below, organised by domain:

On the topic of social values

- *Specific objective 1:* Define the concept of social values for a specific population group and temporal context.
- *Specific objective 2:* Analyse the evolution of values influencing normative futures in the domain of competitiveness for wellbeing in Euskadi, providing a comparative perspective with various European welfare culture models and incorporating gender and generational perspectives. For this objective, several literature-based hypotheses are proposed:
 - H1: There is a trend towards post-materialist values (of personal expression) in the Basque Country.
 - H2: The importance of the value of work is lower in younger generations.
 - H3: Euskadi has a higher locus of control than the European average.
 - H4: Gender differences on locus of control have decreased in the last decade in the Basque Country.

On the topic of shared vision

- *Specific objective 3:* Define the concept of a shared vision for a specific territory.
- *Specific objective 4:* Explore how a shared vision-building process can be effectively conducted within a specific territory.

On the intersection of social values and shared vision

- *Specific objective 5:* Conceptually and analytically understand how social values influence shared vision development processes at the territorial level.
- *Specific objective 6:* Identify key recommendations from the perspective of social values to enable policymakers to implement robust and effective shared vision-building processes that are transformative.

All these objectives represent intermediate intellectual goals aimed at advancing knowledge to establish a foundation for fostering a society that is culturally more prepared and cohesive for undertaking shared visioning processes capable of driving transformation toward more sustainable and inclusive futures.

After having articulated what this dissertation pursues, a couple of notes are added on what this thesis is *not* about. The object of this thesis is not to delve into the impact of social values on other types of futures exploration tools (trends, scenarios, projections, etc.), but rather to focus exclusively on the processes of shared vision generation. Additionally, the thesis does not directly address the ethical framework (or moral values) that futures researchers should adhere to in order to develop their profession in a proper manner. Furthermore, it does not analyse how social values will evolve in the future (Minkinen, 2022).

Structure of the dissertation

The rationale behind the designed structure is elaborated in detail in the methodological section, but it is briefly outlined here to provide the reader with an overview of the inquiry. The structure reflects, as closely as possible, the process undertaken to elaborate this dissertation.

Once this introduction is finalised, the dissertation begins with [Chapter 1](#), which focuses on the **methodology** and the methods employed in the study. Notwithstanding the prevalence of doctoral theses that commence with a theoretical framework and subsequently move on to the methodology, the structure of this thesis starts with the methodological chapter as it establishes the philosophical underpinnings that inspire the entire study. Next, there are two chapters that form the basis for constructing the conceptual and analytical framework object of this dissertation.

On one hand, [Chapter 2](#) presents a review of the **State of the Art** in the fields of social values, the futures domain, and their intersection, theoretically contextualising the research. This chapter serves to address *Specific Objectives 1 and 3*, which aim to conceptually define both social values and the shared vision.

On the other hand, [Chapter 3](#) describes the **Euskadi 2040 case study**, the regional visioning example of the Basque Country in which this dissertation is based. At the end of this chapter, six "key experiential learnings" are summarised, which have contributed to the development of the conceptual and analytical framework. This chapter addresses *Specific Objective 4*, by providing a detailed exemplary process of how a shared vision is constructed in a region, process that can serve as inspiration for other territories.

Additionally, the first three chapters include a specific section titled "in short" at the end of the chapter, summarising the key takeaways.

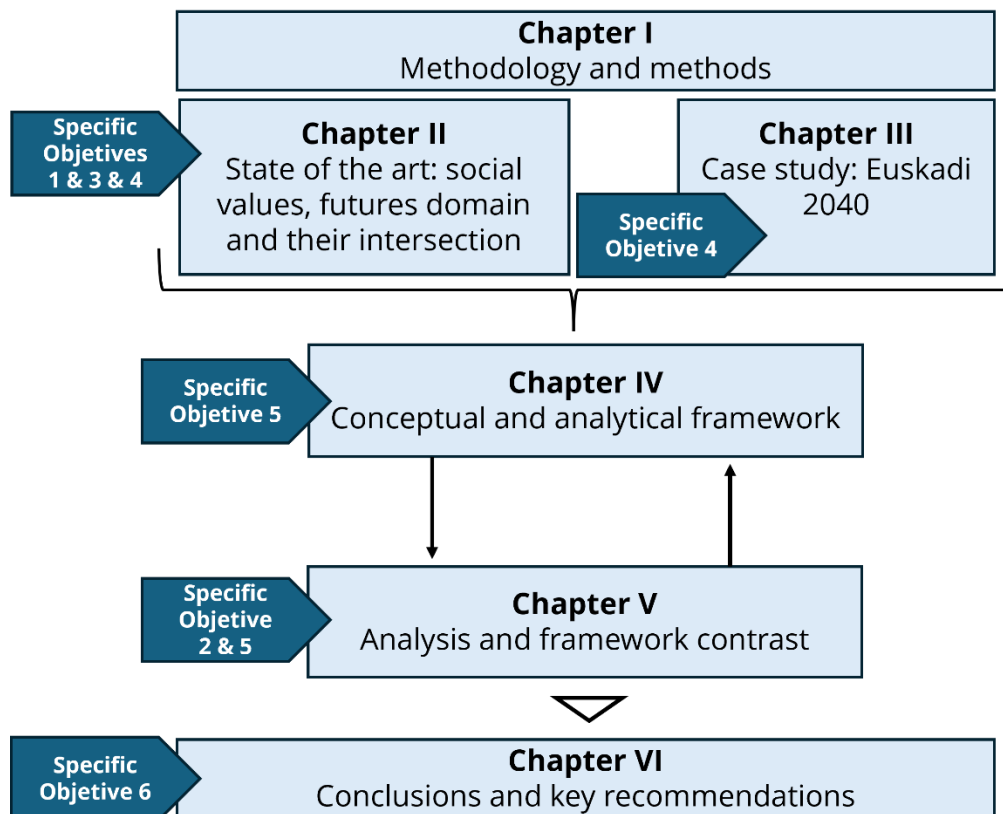
[Chapter 4](#) then introduces the **conceptual-analytical framework** developed to address the study's main research question and *Specific Objective 5*, regarding conceptually and analytically understanding how social values influence shared vision development processes at the territorial level.

[Chapter 5](#) focuses on **applying the conceptual-analytical framework** to the case study discussed in Chapter 3. This application helps analyse the existing social values in the Basque Country which have an impact on the competitiveness for wellbeing vision and how they have evolved. The analysis looks at factors such as time, age, and gender, fulfilling *Specific Objective 2* and contrasts the four hypotheses. Additionally, applying the framework allows for its refinement and improvement, which is addressed in the last section of the chapter. The result is the final version of the conceptual-analytical framework.

Finally, [Chapter 6](#) presents the main **conclusions** of the study and provides a series of key practice-oriented **recommendations** derived from the research, thus addressing *Specific Objective 6*. Lastly, it concludes by outlining potential directions for future research.

We conclude this introductory section by providing a visual representation of the dissertation structure below, which links each chapter to the specific objectives dealt with, as described earlier.

Figure 0.1 Dissertation structure by chapter and specific objectives addressed



Source: Own elaboration

Chapter I

Methodology, methods and their ethical dimension

The following chapter presents the methodological approach employed in the dissertation. It not only outlines the methods used to conduct the research but also elucidates the choices made and the researcher's positionality with respect to the research. In this study, the term 'method' is used to refer to the specific techniques and procedures employed to collect and analyse data (Harvey et al., 2023). The term 'methodology', on the other hand, encompasses the underlying philosophical stance and values of the researcher that inform the choice of these methods (Burton, 2001; Canto, 2019; Harvey et al., 2023).

Burton (2001) argues that the differentiation between methodology and method represents a significant contribution of critical and, in particular, feminist approaches to the scientific community. It serves to challenge the assumption that researchers can implement a method in an uninfluential way. Concurrently, each methodological and methodical selection entails an ethical dimension that must be duly considered. This will be elucidated in the third section of this chapter.

1.1. Methodology

Every choice is a value judgement. What matters in science is to make choices explicit and to justify them properly (W. Bell, 2017; Jackson, 2013). For this reason, the following section argues the choice of action research for territorial development as the underlying methodology of the dissertation, since it allows us to answer the research question by generating useful and transformative knowledge. First, the fundamentals of the methodology will be presented, followed by two highly relevant issues, for being the most predominantly questioned aspects of the methodology chosen: positionality of the researcher and validity of the knowledge generated in action.

1.1.1. Action research

A strategy for social change

Action research has been defined as a practice-based orientation to knowledge creation, where researchers collaborate with practitioners in order to generate transformative change (Bradbury Huang, 2010). Action research is therefore, in addition to a methodology for knowledge generation, a strategy to promote social change via research (Greenwood & Levin, 2007; Melero Aguilar, 2012).

It emerges as a response to the conventional models of knowledge creation, and in particular, in response to the way in which knowledge production has traditionally related to action. Kerkhoff and Lebel (2006) identify two conventional models that have historically framed the relationship between knowledge production and action:

- The trickle-down model assumes that a researcher's responsibility ends with the publication of peer-reviewed findings, which policymakers are then expected to adopt independently, without further engagement from the academic community.
- The knowledge transfer and translation model, goes beyond the first model, limiting the engagement of the academic community to ensuring that scientific findings are adopted by stakeholders, such as, civil society, governments, and the business sector.

Both of these conventional models see the process of knowledge production and its dissemination as linear, disregard the value of experiential knowledge actors are endowed with, ignore power structures and social and institutional dynamics of knowledge production, and overlook the socially constructed nature of knowledge (Gibney, 2011; van Kerkhoff & Lebel, 2006). In response to these limitations, new approaches to research have emerged, aiming to integrate diverse forms of knowledge and foster co-generated knowledge, such as action research.

The focus on action has been a key factor in the selection of this methodology for the development of this dissertation; since the futures domain, and in particular its normative approach (Kuosa, 2012), is concerned with conceptualising the future in order to facilitate change in the present. Action research is therefore a methodology that suits futures domain and strategic foresight purposes (Floyd, 2012; Ramos, 2017).

Action research for territorial development (ARTD)

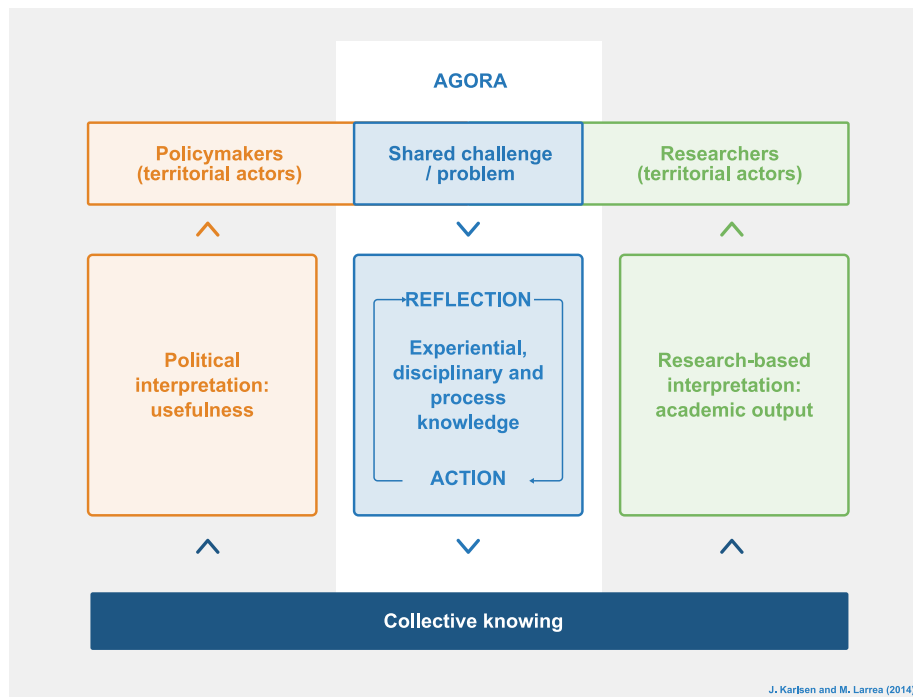
The expansion of action research has led to the emergence of varieties of action research (Greenwood & Levin, 2007), each drawing upon different theoretical schools or branches of literature to inform their foundations. In the intersection between action research and futures domain there is an specific approach denominated "action foresight", defined as the application of participatory

action research techniques to futures domain (Ramos, 2017). However, the present dissertation adopts the modality of action research for territorial development (henceforth, “ARTD”). This is the modality developed at the research institute I work for, and for which I have received both theoretical and practical training.

This approach draws heavily on regional innovation systems and competitiveness (and territorial development) literature, the educational principles of Paulo Freire, and the pragmatist traditions developed in Norway (J. Karlsen & Larrea, 2014, 2018). It is further shaped by the systemic perspective of the sociotechnical school and the co-generative model (Greenwood & Levin, 2007), as well as by the democratic school’s focus on dialogue as a pivotal tool for driving territorial transformations (Costamagna & Larrea, 2017).

The first step in an ARTD process is for researchers and policymakers to jointly define the shared problem (J. Karlsen & Larrea, 2018, p. 263). Afterwards, ARTD comprises a series of cycles of reflection, decision-making and action, in which researchers and policymakers engage in a joint process of knowledge generation with a focus on action-oriented outcomes, leading to collective knowing. Consequently, it is not assumed that the researcher is the repository of all knowledge and that this must be transferred to the actor. Rather, the objective is to construct knowledge collaboratively. This co-generated knowledge is conveyed to the academic community by researchers in the form of academic output, which is then translated into action or strategic plans by policymakers. This has been conceptualised and visualised in the Co-generative model by Karlsen & Larrea (2014). The researcher assumes the role of process facilitator, creating the necessary conditions to support the actors in reflection, decision-making and action (Costamagna & Larrea, 2017).

Figure 1.1 Co-generative model of ARTD (Karlsen & Larrea, 2014)



Source: Karlsen & Larrea (2014) at Orkestra corporate website

The objective of this chapter is to elucidate the methodological framework of the thesis, rather than to present a comprehensive theoretical framework of the methodology employed. Consequently, only the fundamental principles of ARTD will be enumerated without deep explanation of each. Some of these tenets will be reiterated in the section on positionality. The fundamental principles of ARTD include (Costamagna & Larrea, 2017, p. 32):

- Connection between action research and territorial development.
- Pragmatist approach.
- Claim of the social researcher as an actor who generates change.
- Interpretation of conflict as a natural situation in territorial development.
- Orientation towards the construction of collective knowledge in action.
- Absence of neutrality of researchers.
- Interpretation of dialogue as a basic process in territorial development and the agora as a space for dialogue.

Compatibility with multiple methods

Action research, and also ARTD as a methodology, is compatible with a variety of data collection methods and techniques (Coghlan & Shani, 2018). "Formal quantitative, qualitative, and mixed methods all are appropriate to differing situations" and action-researchers should not exclude any of them by default (Greenwood & Levin, 2007, p. 7).

In addition, the two thematic areas of inquiry of this dissertation have been the subject of investigation, with the application of diverse methodologies and corresponding methods. On the one hand, social values "are desirable, they can also be multiple, diverse, abstract, tacit, hidden, temporary and conflicting (...) makes them notoriously difficult to research in practice" (Espedal et al., 2022a, p. 2). They have been explored mostly from a positivistic paradigm, with examples such as Hofstede, Schwartz or Inglehart's work based on quantitative studies (see 2.1.4). However, a constructivist paradigm has also been explored for values-related research (Espedal et al., 2022b) with numerous methods and techniques, such as, participant observation, thematic analysis, discourse analysis, narrative approach, case studies and also the methodology of action research (Espedal et al., 2022b, p. 4).

On the other hand, in futures domain, a large corpus of the literature targets methods, following diverse logics. For Inayatullah (2012), the most interesting results emerge from the combination of predictive (quantitative), interpretative and critical perspectives (Inayatullah, 2012). The existing different epistemological approaches are explained deeper in the futures domain theory section (see 2.2.3) together with the approximation of this author, which is, **critical realism**, which is compatible with the employment of mixed methods for studying futures. To provide a short definition, the term critical realism refers to the position that the future is determinable by human agency, albeit only to a certain extent, insofar as there are also exogenous factors that influence the future (W. Bell, 2017; Gong, 2024).

1.1.2. Positionality of the researcher in the process

Positionality is a critical element in the methodology definition (Jackson, 2013). In essence, positionality reflects the researcher's lens and location within the research context, which influence the interpretation and outcomes of the study. It is connected with the identity and presence of the researcher (Swaminathan & Mulvihill, 2019). The most common approach in positionality is a

dichotomy between **insiders and outsiders** (Arrona Etzaniz, 2018). The insider or outsider position of the researcher results in different types of data (Swaminathan & Mulvihill, 2019).

From the action-research perspective, one of the most consolidated works on this topic is the positionality continuum proposed by Herr & Andersen (2015). They establish a continuum and not a hierarchical position, clarifying no positionality is ideal and they all have their limitations. The important aspect is that, by the establishment of the positionality, the researcher makes an exercise of self-reflection which is essential for the ethical standards and the trustworthiness of the inquiry. There is much debate in the literature about how deep reflexivity should dig, how much is too much, and where the in-between is. The in-between has also been referred to as pragmatic reflexivity, which makes the researcher aware of his or her history, biography, emotions, etc. but in a feasible manner (Luttrell, 2019).

In action-research, insiders are defined as those who "own" the problem (Greenwood & Levin, 2007). By this definition, I assume an insider position concerning the object of analysis. This is attributable to the fact that I have been involved in the research project and work for Orkestra, the research institute, that is an actor in the territory with the mission of promoting competitiveness for wellbeing of the Basque Country.

While the insider stance has been criticised for potentially compromising neutrality or objectivity, traditional notions of researcher neutrality are increasingly challenged. Scholars argue that neutrality is an unattainable ideal; researchers are always situated within specific histories, values, and social constructs that inevitably influence their perspective. According to Maxwell (2013, p. 70) "Any view is a view from some perspective and is therefore shaped by the location (social and theoretical) and lens of the observer".

Karlsen and Larrea (2015, p. 143), drawing on Paulo Freire's work, further elaborate on this concept within ARTD, arguing "no researcher in the agora is neutral, whatever research method is used (...) (*as researchers*) we cannot approach territorial development considering our reading of the territory as the true one, but neither can we approach it without a political position". Similarly, in the intersection of social values and futures domain, Bell (2017, p. 128) asserts "in any event, today there is precious little value-free science."

In addition to positionality, the dissertation also considers the voice employed in its writing. The analysis is presented in the **second person**, aligning with the perspective of mutual investigation. As Coghlan (2007, p. 337) notes, this approach contrasts with first- or third-person narratives and emphasises collaborative inquiry through dialogue and face-to-face conversations on matters of shared interest. This voice reflects the dialogical and participatory nature of the research, reinforcing the intertwined roles of the researcher and the community in the knowledge-generation process.

1.1.3. Validity

All research, irrespective of its methodological and methodical approach, must be subject to validity criteria (Eikeland, 2006; Greenwood & Levin, 2007; J. Karlsen & Larrea, 2015). Validity can be defined as "something "sound", i.e. well-grounded on principles or evidence, and able to withstand criticism or objection" (Eikeland, 2006, p. 197). Karlsen & Larrea (2015) employ the following table for a reflection on the validity of ARTD processes, connecting the concept of validity with others often used in (particularly qualitative) literature, such as credibility, transferability or viability of research:

Table 1.1 Validity (Karlsen & Larrea, 2015)

	Internal (for participants in the context where the concept or framework was developed)	External (for others, researchers and policymakers that did not participate in the context where the concept or framework was developed)
It makes sense	Internal credibility	External credibility / transferability
It has been applied to reflection processes in concrete actions	Viability	Connectivity

Notes: Translated from Spanish

Source: Karlsen & Larrea, 2015, p. 159

The development of this dissertation is aligned with and contributes to the 'Euskadi 2040' initiative, as will be discussed in greater detail later (see 1.2.1.2). The dissertation represents one of the outcomes of the research project, which is a more comprehensive endeavour and should be considered when evaluating the validity of the research conducted.

The main outcome of the Euskadi 2040 process is a shared vision statement document (Appendix V), encompassing a description of the visioning process and the resulting shared vision statement and framework (see Izulain Alejos et al., 2023). The process has been identified as a “best practice” in the futures domain by different external researchers and policymakers at the international level (see 1.2.1.2); therefore, it has proved credible externally or transferable to the external sphere as defined in Table 1.1. In addition, regarding viability, one of the main immediate impacts of the process has been the adoption of the Euskadi 2040 Shared Vision as a tool to frame the Biscay Mandate Plan 2023-2027, proving the multilevel alignment of the Provincial Council with the vision (see 3.2.3.2).

Regarding the validity of the dissertation, first it is interesting to highlight that the co-supervisors of the thesis held different positions with regard to the case study. One of the supervisors was external to the process, whereas the other co-supervisor has been part of the research team executing the visioning process in Euskadi 2040. This implies that each contrast of the work carried out to answer the research questions of the thesis underwent a double filtering feedback process: external and internal to the process.

External credibility of the dissertation has been guaranteed in a number of ways: first, throughout the process a peer-reviewed article has been published in *European Planning Studies* journal, and has developed three book chapters, promoted by various local and international universities, such as the Cities 2030 series promoted by the University of Deusto, the book titled “The Evolution of Action Research for Territorial Development: Nurturing an intergenerational and multicultural environment” (forthcoming) edited by two Orkestra researchers, and the third book of the Iñigo de Loyola Network promoted by the Catholic University of Cordoba.

Second, this author has taken part in three conferences presenting partial results of the present dissertation. The academic conferences were two on the topic of Regional Studies (RSA Conference 2022 and 2024), and one on the topic of Action Research (IJAR 2022).

Third, a session² was held with six predoctoral researchers to contrast the conceptual-analytical framework (Chapter IV) of the dissertation. Participants were invited to share their perspectives on the framework, indicating whether it made sense to them and suggested minor modifications. Fourth, for external validity of policymakers, the framework and key conclusions of the dissertation were shared with the Basque government team that monitors and evaluates the Euskadi 2040 project in a dedicated session³. They also resonated with the framework, providing interesting reflections that have been referred to in the conclusions section (see 6.2).

Lastly, the Euskadi 2040 project and this doctoral dissertation have been a seed for the launch of a new research line on the topic of futures domain within Orkestra- the Basque Institute of Competitiveness. Within this research line, a report examining the existing international foresight models employed by governments has been developed (Izulaín et al., 2025, forthcoming), with a view to facilitating the institutionalisation and mainstreaming of futures transdiscipline within Basque institutions, and particularly the Basque government.

1.2. Methods

Once the underlying philosophical approach has been established, the following section explicates the concrete techniques employed for answering the research questions and specific objectives of the dissertation. For the sake of clarity, two phases can be distinguished in the present dissertation: first, the process of development of the conceptual and analytical framework. Second, the process of applying the analytical framework into practice, to test its robustness.

1.2.1. Conceptual framework development

The conceptual-analytical framework ([Chapter IV](#)), which embodies the main contribution of the present dissertation has been developed by combining different types of knowledge, particularly the theoretical or disciplinary knowledge, and the experiential and process knowledge (J. Karlsen & Larrea, 2015). In particular, the framework has been constructed in accordance with the methodology described, integrating macro- and meso-scale learnings⁴ of the case study ([Chapter III](#)) into the existing debate in the literature or state of the art ([Chapter II](#)).

The explicit statement that the framework has been constructed from theory and practice in a combined way is an exercise of honesty and transparency in regard to the manner in which this thesis has been developed. To assert that it is derived exclusively from theory would be an artificial and fictitious representation, as the theoretical framework has been constructed concurrently with the

² The session was held on the 14th of October 2024.

³ The session was held on the 5th of November 2024.

⁴ Three types of learning emanating from the case can be distinguished:

- *Macro* learnings refer to the knowledge acquired through living the process.
- *Meso* learning refers to the knowledge generated through experiencing the process reflectively, thinking about the implications that the different reflections and actions are having.
- *Micro* learning refers to the knowledge generated through a thorough analysis of the case. The latter are addressed through the analysis chapter.

case study process. Consequently, the case study has significantly influenced the way theory has been perceived. Furthermore, it would mean neglecting to acknowledge the significant value experiential and process-based knowledge offers for the development of the researcher and their research (Flyvbjerg, 2006).

This framework development process might be unconventional, but is far from being novel, since there are doctoral dissertations that employ a similar logical framework (Costamagna, 2015). This logic has been reflected in the structure of the dissertation.

The methods used for each of the bases on which the conceptual framework is based are discussed in more detail below: the literature review for the theoretical framework, and the case study as a research design for acquiring practical knowledge.

1.2.1.1. Literature review

The second chapter on the state of the art was carried out through a literature review, which is not a mere summary of studies on the topic in question, but a selection of those studies that are “relevant” when making an argument of the dissertation (Maxwell, 2013, p. 189). The objective is to engage the authors in dialogue and tell a story (Bryman, 2012, p. 100).

The review was conducted through an exhaustive consultation of several of the most extensive online bibliographic databases, including Scopus and Google Scholar, along with the database of the University of Deusto, called Océano. In addition to keyword searches in the databases, the bibliographies of the studies identified as relevant were also consulted and backtracked.

The references have been managed with the support of a bibliography managing tool or software denominated Zotero. The software has proved valuable in organising the references according to thematic or theoretical approaches, as well as in identifying specific quotations pertinent to the theoretical framework of the thesis.

1.2.1.2. Case study

The research design of this dissertation is a **single in-depth case study**. Concretely, the visioning exercise of the Basque Country between 2021 and 2024 will be analysed, in short denominated “Euskadi 2040”. Two decisions adopted in this dissertation are argued below. The first concerns the suitability of the case study approach for this particular study. The second addresses the rationale behind the selection of the Euskadi 2040 case.

Why case study as research design?

The intersection of the two broad domains (i.e. social values and futures domain) presents significant complexity, further justifying the choice of a single case study (Flyvbjerg, 2006). This design allows for a focused exploration of this complexity within a manageable scope.

One of the main criticisms, that has become *vox populi* to case study research design is the difficulty of generalisation, even more when it is a single case study (and not comparative design). This argument is clearly disputed Flyvberg (2006). In the event that even this does not persuade critics, it is worth reminding that the objective of research, and also this dissertation, is not the generalisation of results, but the generation of solid theory (Bryman, 2012, p. 71), that can then be useful and tailored to other places. It can be reasonably concluded, therefore, that the case study approach is both appropriate and legitimate.

Additionally, the detailed description of the case itself holds intrinsic value, irrespective of the specific theory that can be extracted from it in this particular dissertation. Following Flyvberg (2006, p. 241), “despite the difficulty or undesirability in summarising case studies, the case-study method in general can certainly contribute to the cumulative development of knowledge”. To be more specific, the case, on its own, contributes for instance to the research question pointed out by Beer and Sotaratura (2021) there is a strong “need to know more about (...) how visions guiding shared activity emerge or are constructed” and answers Specific Objective 4.

This chapter aims to provide a faithful and contextualised ethnographic description of the case, highlighting key phases and interventions that have shaped the process, without delving into the interpretive depth of a thick description (Geertz, 2008). The descriptive focus is limited to macro and meso aspects of the process (see footnote 4), with more granular, analytical insights deferred to Chapter IV (Regarding analysis and contrast of the framework), which examines micro-level processes and specific values linked to level and roles.

Why was Euskadi 2040 case selected?

The research questioned posed on this dissertation, regarding the understanding of the influence of social values on visioning processes required the case to fulfil both domains, first, the actual undertaking of a normative foresight exercise in the territory, and second, the possibility to analyse values data. It was challenging to identify a case that exhibited both of these characteristics. However, Euskadi 2040 also possesses the following important features:

- Regional character and longitudinal potential: The study addresses a regional-level foresight process, which is increasingly spreading, but still novel at this point. The Basque Country is one of the few regions participating in the European Values Study, allowing for a longitudinal analysis of values.
- Recognition as good practice: The case has been acknowledged as a "good practice" by multiple multi-lateral institutions and other regional authorities⁵:
 - Recognised by the Flanders Chancellery & Foreign Office in the strategic foresight arena (Flanders, 2024).
 - Designated a "regional revelation" by the OECD (Stancova et al., 2024).
- Access to data and immersive perspective: This authors role as an insider co-generator from the inception of the case provides unique and immersive access to analyse the process.

The social, economic, and geographical characteristics of the region, as well as its relevance to the research, are discussed in detail in the introduction section of the corresponding chapter (see 3.1)

1.2.2. Analysis: mixed methods

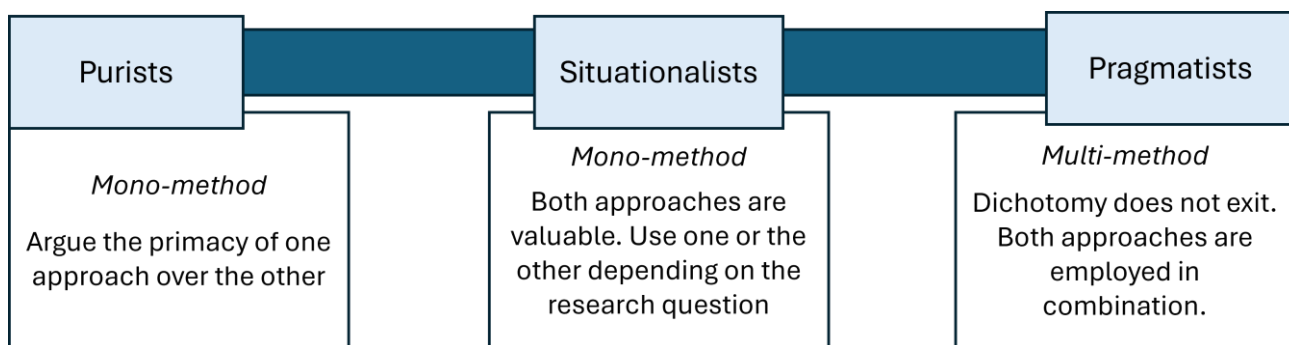
The 20th century saw a schism emerge within the research community, with researchers adopting either a quantitative or a qualitative approach. This dichotomy persists to this day, with the majority of doctoral candidates opting for one of these two methodologies when undertaking their dissertations. However, there are indications that a more and more researchers are challenging the

⁵ The initiative has also been included in a study by the Joint Research Centre of the European Commission (Matti & Cappellano, forthcoming).

'incompatibility thesis' (Howe, 1988), shifting away from the "misleading 'mythologies' about the nature of quantitative and qualitative research" (Onwuegbuzie & Leech, 2005, p. 382).

During this period, three distinct positionalities have emerged regarding the relationship between traditional research methods (Onwuegbuzie & Leech, 2005). Some posit that the two approaches are incompatible, either advocating for one over the other or suggesting that each approach is more suitable than the other depending on the research question. Others, however, argue for their complementarity. A number of authors contend that these two approaches represent the two extremes of a continuum (Sosulski & Lawrence, 2008). The following figure shows the three distinct positionalities on the continuum.

Figure 1.2 Quantitative and qualitative analysis relationship positions



Source: Own elaboration based on Onwuegbuzie & Leech, 2005

There are numerous differences between the two approaches, including the role and proximity of the researcher to the participant (Yoshikawa et al., 2013). However, there are more similarities than differences among the approaches (Johnson & Onwuegbuzie, 2004; Onwuegbuzie & Leech, 2005). Indeed, both approaches have strengths and weaknesses, and "each method can be greatly strengthened by appealing to the unique qualities of the other" (Sieber, 1973, p. 1335). According to Creswell and Creswell (2018), the use of mixed methods in research also allows for the reflection of the natural process of inquiry, with a progression from inductive to deductive reasoning at various stages of the research process. And additionally, "mixed methods designs can be especially powerful in illuminating policy solutions and directions for social action" (Sosulski y Lawrence, 2008, p. 121), which is the ultimate aim of this dissertation.

Five purposes of mixed-method studies have been identified (Greene et al., 1989, p. 259):

- *Triangulation: seeks convergence, corroboration, correspondence of results from different methods.*
- *Complementarity: seeks elaboration, enhancement, illustration and clarification of the results from one method with results from the other method.*
- *Development: seeks to use the results from one method to help develop or inform the other method, where development is broadly constructed to include sampling and implementation, as well as measurement decisions.*
- *Initiation: Seeks the discovery of paradox and contradiction, new perspectives of frameworks, the recasting of questions or results from one method with questions or results from the other method.*
- *Expansion: Seeks to extend the breadth and range of inquiry by using different methods for different inquiry components.*

The present dissertation analyses social values. As explained above, both quantitative and qualitative approaches have been employed for values analysis purposes (Espedal et al., 2022a; Nowack & Schoderer, 2020; Rohan, 2000). In addition, a great emphasis is placed on actionability of the framework developed and its transformative character.

In light of the aforementioned reasons, this thesis adopts a pragmatic stance, opting for a mixed methods approach with the intention of seeking complementarity and expansion (Greenblott et al., 2018). Despite the quantitative part is described first, both methods are given equal status and have been analysed in a concurrent manner (Creswell & Creswell, 2018; Johnson & Onwuegbuzie, 2004).

Prior to embarking upon a detailed examination of the mixed analysis in the following sections, it is imperative to acknowledge a particular point related to the temporal scope. The quantitative analysis (based on surveys, mostly secondary data) were conducted in 2019 (the general survey) and in 2024 (a specific survey on leaders). Nevertheless, the qualitative data (mostly based on the analysis of the systematisations of several meetings and contrast session with diverse stakeholders in the Euskadi 2040 process) has been gathered between September 2021 and November 2024. Although this is not an optimal approach in terms of timing, it is acknowledged that this is a valid analysis (even though the largest part of the quantitative component precedes the process) given that social values require a significant period to demonstrate variability. In fact, the latest wave of the survey has been conducted several years apart in different territories. The next wave of the survey is currently being developed. Upon completion, further analysis and monitoring of the impact of the visioning process on values will be possible.

1.2.2.1. Quantitative approach

As described in the mixed-method introduction, part of the analysis developed in this dissertation follows a quantitative logic. Specifically, an analysis of a questionnaire (i.e. European Values Study) has been carried out using IBM SPSS Statistics software.

Data collection and samples

The European Values Study (henceforth, EVS) was initiated in 1981 and has since been conducted, with a 9-year periodicity, in 1990, 1999, 2008, and 2017⁶. Its primary aim is to provide researchers with data to explore whether and to what extent European individual and social values are evolving (Luijkx et al., 2021).

Since 2017, the EVS has collaborated with the World Values Survey (WVS) to expand comparability of values to a global scale. Over time, the number of participating countries in the European edition has grown, and increasingly, research teams have conducted sub-national replications of the survey. This includes a replication of the study at the regional level in the Basque Country. This study was managed by the Social Values Research team at the University of Deusto, to which access was provided via the co-supervision of this dissertation. Therefore, a quantitative approach via EVS has been selected as the best fit for this dissertation for its capacity to facilitate comprehensive longitudinal and geographical analyses, with the potential for regional analysis in the Basque Country.

⁶ Specific years can vary slightly from one analysed territory to the others (between 2017 y 2019).

The quantitative analysis of the present dissertation encompasses several databases, and is based primarily on secondary data combined with some primary data (Bryman, 2012). Existing datasets used include: the fourth⁷ (2008) and fifth⁸ (2017) waves of the EVS integrated dataset, which are available at the EVS website; and the 2008 and 2019 editions of the EVS applied to the Basque Country, data provided by the Social Values Research team of the University of Deusto.

The total sample of the fifth EVS integrated set has been obtained by compiling the dataset of 34 European countries (N = 56.491), all of which are representative since they include more than 1.000 responses per country. For the application of the survey to the Basque Country, the last wave has 800 responses for a confidence level of 95%, and assuming maximum population variability $p = q = 0.5$, the sampling error for the whole sample is + 3.46%.

Additionally, a small subset of EVS questions was specifically selected to create a primary dataset for the purpose of the dissertation. This included a selection of 16 questions of the EVS questionnaire (included as Appendix I) and was responded by the leadership team of the Euskadi 2040 visioning project, including four representatives of the Basque government, that participated in leading the visioning process throughout the life cycle of the project, and two representatives of the research team, including this author. Certain ethical considerations of this survey are included in the respective section (see 1.3). The involvement of policymakers in the dissertation was achieved via direct communication, since they were accessible to this author for sharing the research project "Euskadi 2040".

The combination in the leadership group of policymakers and researchers, is an innovative shared leadership model justified by the complexity of undertaking visioning processes in the current unstable environment (Izulain et al., 2024). As it is argued in the paper, this model allows for multiple leaderships to emerge in action. However, in this context, the concept of leadership is narrowly defined. It encompasses only those individuals who have been involved in the design and implementation of the visioning process, and not those who have assumed the role of translating the vision into action.

As mentioned before, the EVS surveys are conducted approximately every nine years; however, the questionnaires are not replicated in an identical manner, some (in many cases minor) modifications are included. For this reason, for the two waves analysed a Table of Equivalence of Questions is included as Appendix II. The changes from one wave to the other include, from the absence of the question, to giving a different question number, or assigning different numbers to variable responses. Depending on the differences, the variables have been treated differently, in the data preparation phase⁹. For this purpose, the "select cases" and "recoding" functions of the software have been employed.

⁷ Accessed at: <https://europeanvaluesstudy.eu/methodology-data-documentation/previous-surveys-1981-2008/survey-2008/>

⁸ Accessed at: <https://europeanvaluesstudy.eu/methodology-data-documentation/survey-2017/full-release-evs2017/>

⁹ Specific changes in questions are detailed in the Appendix II and in the analysis chapter.

Data analysis and study variables

A total of 16 questions reflecting social values have been selected for analysis, 3 reflecting vision values, 5 reflecting visioning values, and 8 reflecting vision-action values, as defined in the conceptual-analytical framework (see [Chapter IV](#)).

Table 1.2 Overview of social values subjected to analysis

Type	Social values
Visioning values	Freedom of choice and locus of control
	General trust
	Trust in government
Vision values	Post materialism index
	Values to be transmitted to future generations
	Competition good/bad
	Individual vs State responsibility for providing for livelihoods
	Provision of society
Vision-action values	Personal commitment towards environmental protection
	General commitment towards environmental protection
	Importance of work, family, friends and acquaintances, free time, politics and religion
	Important aspects in a job
	Good/bad work importance decrease
	Immigrants strain on welfare system
	Better if immigrants maintain/not maintain own customs
	Speak the language

Source: Own elaboration

The majority of the selected questions are scale variables, making this analysis primarily reliant on descriptive statistics, including measures such as mean, mean comparison, standard deviation and percentages. Data visualisation techniques, such as histograms, have also been employed to provide a clear depiction of the distributions. As detailed in the section on datasets, the analysis is conducted separately for territorial values (based on secondary data) and the values of the leadership team (derived from primary data). These two datasets are then compared to identify potential differences or similarities.

Lastly, four comparability criteria have been applied in order to enrich the analysis:

- **Longitudinal lens:** A longitudinal perspective examines the evolution of values in the Basque Country between the fourth wave (2008) and the fifth wave (2017-2019)—the two most recent datasets available at the time of this dissertation's development.
- **Cross-cultural comparison:** A comparative analysis is undertaken across regions reflecting distinct welfare culture models, as proposed by Ferrera (1998) (see 2.1.7.2 for reference). Specific countries representing these models have been selected due to the following criteria:

- Scandinavian model: Finland, chosen for its longstanding adoption of future-oriented socio-political techniques (Amini et al., 2021; Monteiro & Dal Borgo, 2023; Prityi et al., 2022; SOIF, 2021).
 - Continental model: Germany, as a key representative due to its significant industrial base, akin to that of the Basque Country.
 - Anglo-Saxon model: Great Britain, recognised as a leading example of this welfare model.
 - Southern European model: Spain, selected for its geographic and cultural proximity to the Basque Country, allowing for an exploration of the influence of Southern European culture on the Basque region.
- **Gender Perspective:** A gender analysis of social values is conducted. It is noteworthy that the leadership team has been comprised predominantly of women, with 66.67% of its members being female.
 - **Age Perspective:** Generational differences are examined to identify significant divergences between age groups. A custom generational variable was created for this purpose, adhering to the generational categories commonly used in the United States (see [Table 2.3](#)). While acknowledging potential country-specific variations, the following table presents the uniform criterion that was applied across all regions:

Table 1.3 Equivalence of generation with birth years employed for the analysis

Generation	Years of birth	
Silent generation	1925	1945
Baby boomers	1946	1964
Generation X	1965	1979
Millennials	1980	1994
Generation Z	1995	2010

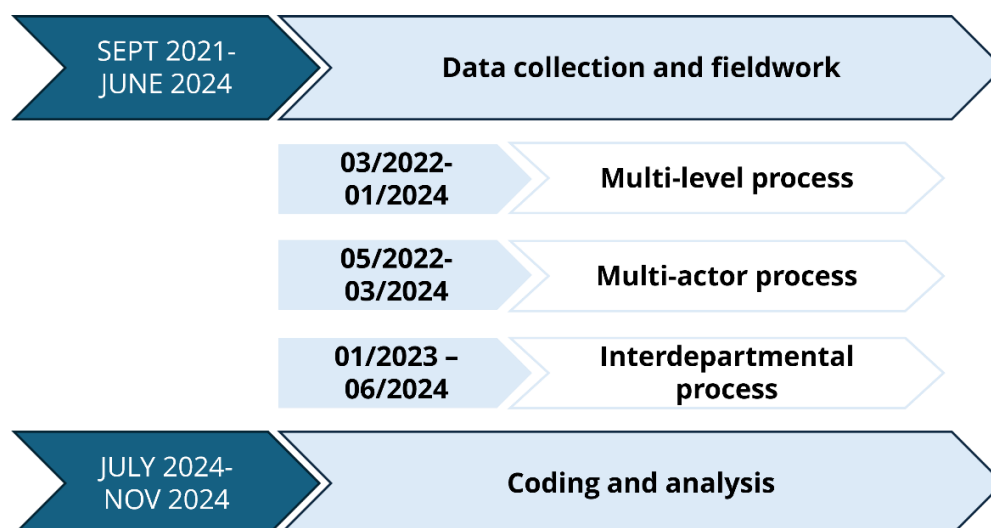
Source: Own elaboration

1.2.2.2. Qualitative approach

In parallel to the quantitative logic, a qualitative perspective is applied as part of the multi-method analysis. For this purpose, a computer assisted Qualitative Data Analysis Software (CAQDAS) has been employed, where the coding and categorisation has taken place via identification of citations. The software provides merely “administrative” support for data processing, which is then interpreted by the researcher.

In qualitative research, we can differentiate between the processes of data collection and fieldwork, and the process of data analysis, and one of the central processes in much of this type of research is coding and categorisation (Bryman, 2012; Gibbs, 2007; Saldaña, 2009). In many cases these processes are carried out simultaneously and reiteratively, but to facilitate the step-by-step explanation of how they have been carried out in this dissertation, they are distinguished below.

Figure 1.3 Chronology of qualitative analysis



Source: Own elaboration

Data collection and fieldwork

As previously stated, a significant portion of the empirical component of this dissertation is based on the case study of the Euskadi 2040 process, in which this author has played an active role as an insider. This process has exhibited significant parallels with the ethnographic method of participant observation, particularly its second type (C. Bell, 1969), wherein the researcher's role is made explicit and becomes of public knowledge, i.e., it is overt, but acts in disclosed spaces.

Table 1.4 Typologies of participant observation

		System	
		Open	Closed
Role	Overt	Type 1	Type 2 X
	Covert	Type 3	Type 4

Source: Own elaboration based on Bell (1969)

Nevertheless, the term "observer" is not entirely compatible with the positionality of this dissertation. Although the participant observer is also an insider, participating in the environment or context in which the research is conducted, they nevertheless maintain a certain distance from it. Their role is to observe reality in order to extract knowledge. In contrast, Karlsen and Larrea (2018) propose the position of co-generator, which entails not only participation but also the joint construction of data through spaces for dialogue between researchers and practitioners. Data collection of this dissertation has been, therefore, in an overt role, closed setting based on a co-generation logic.

Table 1.5 The differences and similarities between the observer and co-generation positions (Karlsen & Larrea, 2018)

Position outcomes	Observer	Co-generation
Data	Generated from surveys, interviews and secondary data	Generated from direct participation and long-term dialogue with practitioners, as well as from surveys, interviews and secondary data
Usefulness for policy	Policy recommendations	Emergence of policy
Codified research	Peer-reviewed research articles and books	Peer-reviewed research articles and books

Source: Karlsen & Larrea, 2018

The primary dialogical space where the case study was developed were the “**contrast sessions**”. These sessions were designed to facilitate interaction and feedback between the research team and the stakeholders involved in the process. Some of the characteristics of these session are the following:

First, the sessions were predominantly conducted bilaterally between the research team and specific actors, institutions, or departments. However, some exceptions occurred, were multiple stakeholders assisted simultaneously, including the sessions with hidden champion companies, third sector contrast, the two interinstitutional sessions or the contrasting session with the youth. For the latter, a specific dynamic suited to youth engagement was employed, which is detailed further in the case study chapter and elaborated in a book chapter (Izulain Alejos et al., 2025).

Second, in terms of the dynamic or flow of the session, partially it could resemble a qualitative interview as defined by Bryman (2012, p. 470), since the research team posed open-ended questions in a conversational manner, enabling active dialogue with participants. However, it is distinguished as “contrast session” and distinct from traditional qualitative interviews as they were centred on the evolving of the vision proposal. This grounded the discussions in the practical development of the vision, reflecting its state at the time of the session and providing a shared basis for dialogue. For this purpose, a structured yet flexible agenda was followed during the sessions (one example of a presentation is included as Appendix III as supporting evidence), including:

- Introduction of research organisation: Presentation of the research team, particularly when the actor was unfamiliar with them.
- Overview of the Process: Brief explanation of the objectives and core principles of the "Euskadi 2040" process.
- Description of the Vision Development Process: Detailing the phases, participants, and steps involved.
- Presentation of the Vision and Challenges: Sharing the state of the vision proposal at the time of the development of the session and associated challenges.
- Reflection and Dialogue: Engaging participants in discussion on their perspectives regarding the vision, including questions such as:
 - Do they agree? Are there any elements they find missing?

- Would they suggest modifying, adding, or removing any challenges?

Following each contrast session, this author proceeded to collate the notes taken during the contrasting sessions into a document that provided a systematic account of the proceedings. The systematisations were then distributed to the participants in the sessions via telematic means, allowing them to review and modify the sections they deemed necessary. Any modifications were automatically incorporated. These systematisations, along with select presentations utilised in the contrast sessions, have constituted the primary documentary basis (Bryman, 2012; Creswell & Creswell, 2018) for the analysis. In addition, the author has kept a research diary or reflective journal during the time of development of the dissertation (Coghlan & Shani, 2018).

Several institutions and local actors participated in the process. A total of 307 individuals participated in the process, in addition to the leadership team. Of these, 221 were young people, with whom 7 contrasting sessions were held. [Table 1.6](#) illustrates the number of contrast sessions (both bilateral and group) conducted throughout the entire process. The sessions are divided into phases of the process, as detailed in the case study chapter ([Chapter III](#)).

Table 1.6 Overview of number of contrast sessions per process phase

Phase of the process	Type of actor involved	Number of sessions
Visioning and backcasting: multi-level	Public institutions in the Basque region: Basque Parliament, three provincial councils, three capital-city councils and EUDEL	9 sessions (7 bilateral, and 2 interinstitutional sessions)
Visioning and backcasting: multi-actor	Local and international actors, including business representatives, third sector, trade unions, and youth	21 sessions
Visioning and backcasting: interdepartamental	Representatives of Departments of the Basque Government related to the Vision on competitiveness for wellbeing	10 sessions
Entire Euskadi 2040 process	Leadership group meetings (government representatives and research team)	15 sessions

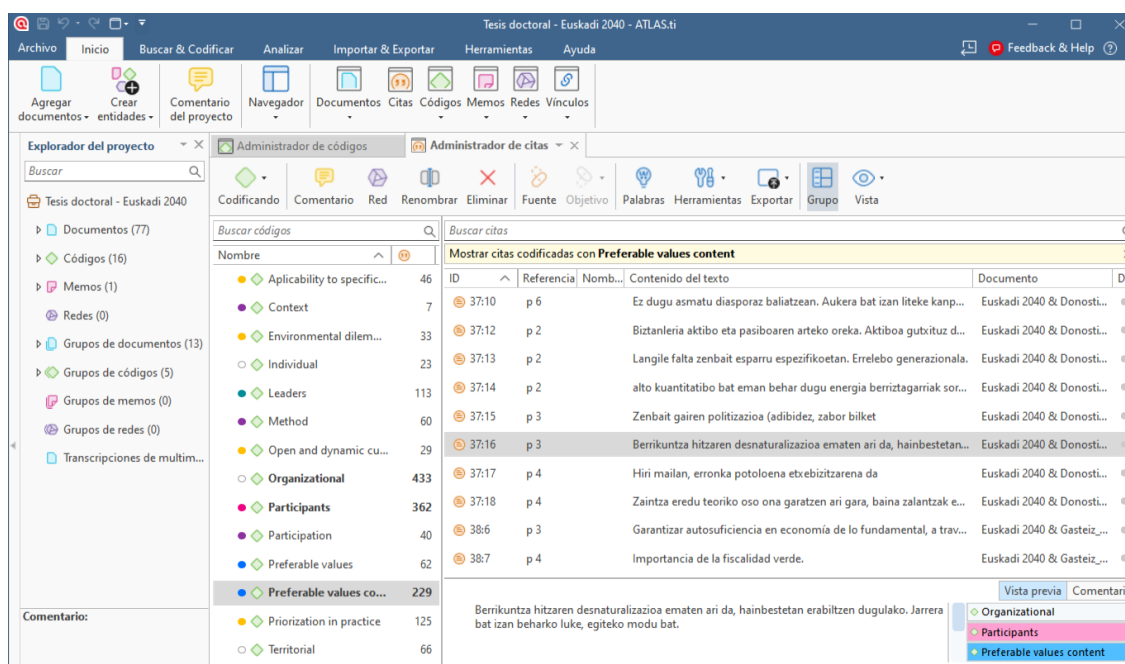
Source: Own elaboration

In terms of logistics and practical arrangements, most of the contrasting sessions were held at the headquarters of the participating actors and institutions, to which the research team travelled. This option was chosen in order to create a more welcoming atmosphere for stakeholders and to minimise the time and efforts required by their involvement. The meetings lasted approximately 60 minutes in the case of bilateral meetings and 120 minutes in the case of group meetings.

Coding and analysis

Coding is defined as the process of “reviewing transcripts and/or field notes and giving labels (names) to component parts that seem to be of potential theoretical significance and/or that appear to be particularly salient within the social worlds of those being studied” (Bryman, 2012, p. 568). An electronic software has been used for coding and supporting with the analysis. The specific CAQDAS employed is Atlas.ti 24.

Figure 1.4 Atlas.ti 24 software screenshot



Source: Own elaboration based on Atlas.ti 24

A total of 77 documents were analysed using the software. Most of them are systematisations of the process, in addition to some presentations, reports, letters, one newsletter opinion article, and a few event discourse transcriptions. Technical data sheets have been prepared for each of the documents, indicating the type of document, the phase of the process to which it relates, the actor involved and the date. In addition, each document is given a number (ID) by which it can be identified when citing quotes in the analysis chapter. The factsheets are attached as Appendix IV. As an overview of the content of the documents, a word cloud has been included below, to extract the key concepts tackled in the case study.

Figure 1.5 Euskadi 2040 qualitative analysis word cloud



*Notes The cloud on the left is the original, and the cloud on the right is the English translation.
Source: Own elaboration, based on Atlas.ti, translated with Google Translate.*

The coding process in this dissertation followed an iterative approach, involving multiple rounds of refinement and revisitation, as emphasised by Bryman (2012) and Creswell and Creswell (2018). Saldaña (2009, p. 10) succinctly notes, "rarely will anyone get coding right the first time". Accordingly, two rounds of coding were conducted to ensure a thorough and nuanced analysis.

In the first round of coding, a list of concepts was derived from the analytical conceptual framework developed to address the research question. As such, this initial coding phase followed a deductive approach (Díez Sanz, 2019; Gibbs, 2007). This approach was selected in order to facilitate the integration of findings from both quantitative and qualitative analyses as part of the mixed methods.

Despite the prior involvement in the process of this author, which provided with a high level of familiarity with the material before the analysis, for being the main author of most of the systematisations, additional concepts emerged during the process. These were incorporated into the list of codes and subcategories, using an inductive logic to capture emergent themes and insights (Bryman, 2012; Gibbs, 2007).

One of the most extensive criticisms of this method of coding in qualitative analysis is the failure of providing context to the specific quotes. For this reason, the choice has been to quote per idea rather than per sentence, allowing to understand the discourse in a more holistic manner. It is also important to note that the categories developed are not mutually exclusive.

In the second round of coding, several decisions were revisited to refine the analytical process. Most quotes were straightforward to code. For instance, determining a participant's role in the process (e.g., leader or participant) dependent on the stakeholder that stated the specific quote. Leaders were coded as such, while others were classified as participants.

However, coding for the level of values presented greater challenges, requiring the establishment of specific criteria: On the one hand, contributions from young participants were coded as "individual" level, as they participated in their personal capacity rather than representing any organisation. For the rest of participants and the leadership group, who generally represented an organisation, the coding approach depended on the context of their contributions:

- If the individual referred to personal life or experiences, their input was coded as individual.
- If they spoke in plural terms or if their statements aligned with the mission of their organisation, their input was coded as organisational.
- *In dubio*, or in cases of ambiguity, the input was presumed to reflect an organisational perspective, as the sessions occurred in a professional setting where participants typically acted on behalf of their respective entities.

The following table resumes the themes, categories and subcategories resulting from the analysis and reflect the logic followed to determine them. In addition, the last column of the table reflects the level of substantiation of each of them.

Table 1.7 Themes, categories and subcategories with their respective logic

CONCEPT/ THEME	CATEGORY	SUBCATEGORY	LOGIC	Nº
TYPOLOGY OF VALUES	Visioning values	Context	Inductive	7
		Method	Deductive	60
		Participation	Deductive	40
	Vision values	Preferable values	Deductive	62
		Preferable values content	Deductive	229
		Vision characteristics	Inductive	34
	Vision-action values	Environmental dilemma	Inductive	33
		Work-life balance dilemma	Inductive	90
		Dynamic culture dilemma	Inductive	29
PROCESS ROLE	Leader		Deductive	113
	Participant		Deductive	362
LEVEL OF VALUES	Individual		Deductive	23
	Organisational		Deductive	433
	Territorial		Deductive	66

Source: Own elaboration

1.3. Ethical considerations

Once the methodology and method of the study have been elucidated, it is important to conclude the chapter with an explanation of the ethical considerations that have arisen throughout the process.

For the quantitative analysis, anonymisation and confidentiality were prioritised. The datasets from Euskadi, Spain, and other regions were based on anonymised data ensuring compliance with ethical standards and safeguarding participant privacy. Specifically, in the questionnaire distributed to members of the leadership team, which was new data created only for the purpose of this dissertation, participants were explicitly informed that the data collected would remain anonymous and treated confidentially, with the following statement in the opening of the questionnaire:

"The data obtained from this questionnaire will be anonymous and treated confidentially. It will be used exclusively for the doctoral dissertation. Any identifiable information will be removed to guarantee

participant privacy." (See Appendix I). In addition, a letter of informed consent was shared with participants (see Appendix VII).

Most responses were completed simultaneously, anonymously, and on paper, making it impossible to associate individual responses with specific participants. For the few questionnaires submitted electronically, the data was securely stored in a personal repository accessible only to the author of this dissertation via personal account and password.

The author of this dissertation is one of the two researchers that has been part of the leadership team of the project. Therefore, this author has completed this survey as a member of the leadership team. To maintain ethical integrity and avoid bias, it was ensured that this survey was completed prior to conducting any part of the analysis of the dissertation or accessing any of the results of the rest of the leadership team or the global and regional results of the secondary databases from any of the years. This approach prevented any potential influence on the responses, whether conscious or subconscious, and ensured that the data collection adhered to ethical research standards.

Regarding the visioning participatory process, when participants were initially contacted, the research team clearly communicated the purpose, sponsors and objectives of the initiative. While most participants represented their respective organisations, the group of young participants engaged in the study in an individual capacity. These participants were all legal age, and no identifiable personal data was collected nor accessed by the research team. Identified data was managed by the educational centres that facilitated setting up the participatory session. The research team only accessed aggregate information, such as the total number of participants, gender distribution, and the field of the educational degree that young participants were undertaking.

In the qualitative analysis, an important ethical consideration was ensuring the quality and validity of the research through robust documentation and systematisation. In action research, as Herr and Anderson (2015) highlight, careful documentation is critical to maintaining integrity. To this end, as described in the qualitative analysis section (see 1.2.2.2) detailed minutes were prepared after every meeting in a form of systematisation, as these were not audio recorded. The systematisations were then shared with all participants electronically, who were invited to review, suggest modifications, or provide clarifications. All modifications referring to opinions expressed by participants suggested by them were included automatically. This iterative feedback process reinforced the accuracy and reliability of the data, ensuring that all perspectives were adequately represented, as it has been described also in the qualitative analysis section. Along with this, the author kept a research diary or reflective journal throughout the entire dissertation period (Coghlan & Shani, 2018).

An important last point to make is the significant ethical tension emerged in balancing confidentiality with transparency. While maintaining strict confidentiality was vital to protecting participant individual privacy, the goals of the research project on which this dissertation is based focused on public policy impact and regional visioning for the future. The potential impact on public policies requires to safeguard transparency also as a fundamental principle of foresight processes as argued by Hanssen et. al. (2009). This is the reason why the actors and institutions participating in the process have been explicated, and not the specific persons involved in those organisations. In action-research ethical principles go beyond avoiding risks for participants, and focus on building trust based relationships with them (Herr & Anderson, 2015). Additionally, transparency of the process allows for future evaluations of the study's reproducibility and provides a clear understanding of the interests represented in the process.

Although this thesis has been developed in English, the source information, and particularly the empirical data, has been collected in the local languages of the case study, namely Spanish and Basque. In order to develop this thesis, two online translation tools have been used, in particular, DeePL (English and Spanish) and Itzuli (Basque-Spanish). The translations have been carried out in a manner that is as faithful as possible to the initial meaning in the source language, particularly in the description of the case study and in its qualitative analysis.

Furthermore, an artificial intelligence tool has been employed during the writing of this dissertation, DeepL Write and occasionally ChatGPT, for (and only for) “AI assisted copy editing” purposes. Following Springer guidelines, it is defined as “AI-assisted improvements to human-generated texts for readability and style, and to ensure that the texts are free of errors in grammar, spelling, punctuation and tone. These AI-assisted improvements may include wording and formatting changes to the texts, but do not include generative editorial work and autonomous content creation” (Springer, 2023).

All data collected during this research adheres to the documentation and data retention policies established under the collaboration agreement governing the project on which this dissertation is based. It establishes that documentation must be securely stored for a minimum of five years from the finalisation of the project, i.e. November 2029. One of the project’s outcomes was the publication of the *Euskadi 2040 Notebook* (Izulain Alejos et al., 2023) which is publicly available as an open-access resource. This publication was shared with all participating organisations as a means of providing feedback on the process and its results. Furthermore, the publication includes acknowledgments to these organisations, recognising their contributions to the initiative. This approach ensures both compliance with regulatory requirements and the ethical principle of reciprocity by transparently sharing the results with stakeholders involved in the research.

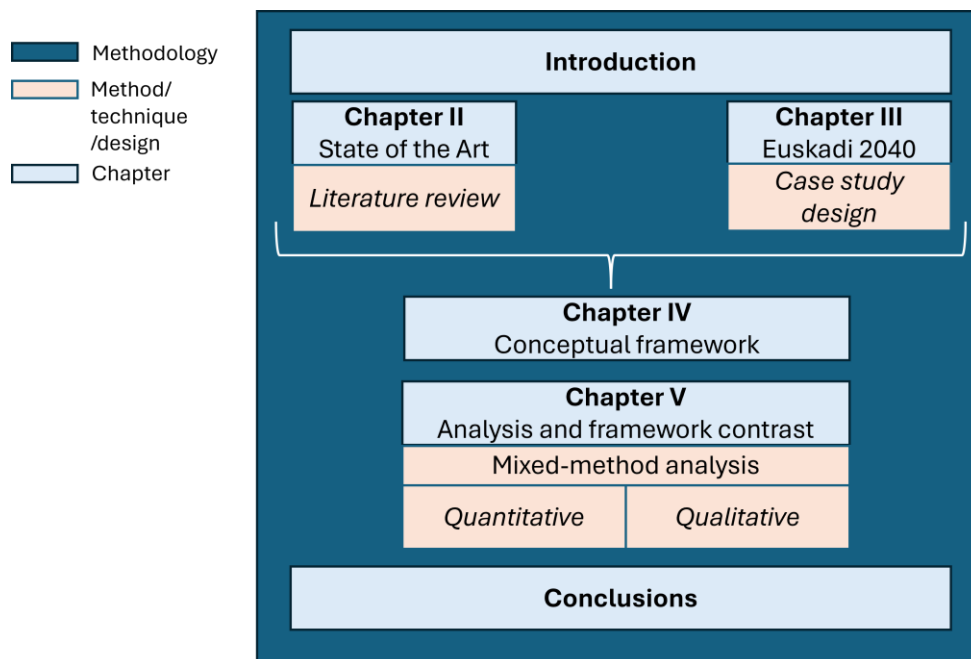
The procedure of this dissertation has been overseen by the Research Ethics Committee of the University of Deusto, which found no objection to it and has issued a favourable report.

1.4. In short

The methodology adopted by the researcher in this dissertation is that of action research for territorial development. This implies that the researcher, operating from an insider perspective, has engaged in the co-generation of actionable knowledge with other key stakeholders. In terms of methods, different techniques have been employed for different parts of the study. The conceptual framework has been designed by combining theoretical (through a literature review) and practice-based knowledge. The latter has been accomplished through the implementation of a single, in-depth case study design for the visioning process of Euskadi 2040.

In order to analyse and test this framework, mixed methods have been used, compatible both with the methodology adopted and with the two thematic areas covered (social values and futures domain). The quantitative part consists primarily of secondary data in combination with some primary data of two waves of the EVS. The qualitative part has been carried out through the analysis and coding of the systematisations of the contrasting sessions held during the process. The following figure summarises the main methods and how they are reflected in the structure of this thesis.

Figure 1.6 Overview of methodology and methods by chapter



Source: Own elaboration

Finally, the various steps taken to conduct the study in the most ethical manner possible, respecting the principles of transparency, reciprocity and confidentiality of data, in order not only to minimise risks but also to build trust in the research, were outlined and argued.

Chapter II

State of the Art

The State of the Art refers to the exercise of describing, understanding, analysing and reviewing the existing knowledge in a particular field (Baines et al., 2007; Vargas et al., 2015). The review goes further than a mere description of the existing literature in a field, being an important part of the researcher to select those studies that are “relevant” when making an argument of the dissertation (Maxwell, 2013, p. 189). The objective of this chapter is to delimit the concepts of social values and shared vision, along with theoretically contextualising the research.

The chapter is structured into three main building blocks: first, a review of the concept of social values; second, the transdiscipline of futures domain, field in which the concept of shared vision is framed; and third, the intersection among the two. Additionally, the first section regarding values includes its connection to the fields of competitiveness and wellbeing. Lastly, each building block includes a summary at the end of each section, under the title “in short”.

2.1. Social values

Since the primary objective of the dissertation is to understand the ways in which social values influence visioning processes, the theoretical framework begins with a conceptual delineation of social values, including their definition, characteristics, and existing measurement frameworks.

Additionally, given that the dissertation focuses on competitiveness for wellbeing field, a literature review is conducted on the connections between values and wellbeing on one hand, and values and competitiveness on the other. This dual approach reflects the established tradition in these distinct branches of literature.

2.1.1. Definition

Definitional inconsistency has been epidemic in values theory and research.
(Rohan, 2000)

The concept of "value" or "values" is extremely ambiguous and polysemic (Argadoña, 2000). This may be due to the fact that there are many social science disciplines from which the concept of value has been studied and researched, with a different, but somehow related meaning (Hofstede, 2001, p. 6). As Milton Rokeach stated *"it is very difficult for me to conceive of any problem social scientists might be interested in that would not deeply implicate human values"* (Rokeach, 1973, Preface).

Social disciplines that have tackled values conceptualisation include, classic and contemporary *philosophy* (Platon, Aristotle, Nussbaum, among many others); *psychology*, with exponents such as Rokeach with his "Value System Theory" (1973) or Schwartz with his "General Theory of Basic Human Values" (1992, 2005); *sociology*, very linked to the concept of culture with exponents such as Inglehart and his Modernisation Theory; *economy and theory of the organisation*, with exponents as Hofstede; and also to a lesser extent pedagogy, anthropology and education (Martí Noguera, 2011).

Since it is also very closely related to ethics, morality and axiology (Penas Castro, 2008), some authors have coined the concept of the "dark forest of values", referring to the very diverse moral institutions that exist in individuals for decision-making, that are clearly differentiated from other norms, institutions and facts (Haidt & Kesebir, 2007).

The multidisciplinary character of the concept leads to a high complexity for its definition (Penas Castro, 2008). The following table provides a selection of the most cited and relevant definitions in chronological order, to serve as a conceptual basis for this dissertation.

Table 2.1 Values definitions by chronological order

Author	Year	Definition	Source
Kluckhohn	1951	<i>"A conception, explicit or implicit, distinctive of an individual or characteristic of a group, of the desirable which influences the selection from available modes, means, and ends of action".</i>	(Kluckhohn, 1951) p. 395
Rokeach	1973	<i>"An enduring belief that a specific mode of conduct or end state of existence is personally or socially preferable to another mode of conduct or end state of existence".</i>	(Rokeach, 1973) p. 5

Ortega y Gasset	1973	Deep beliefs or convictions about things, others and ourselves that guide human existence, based on which we make our decisions.	(Ortega y Gasset, 1973)
Schwartz	1992	<i>"Desirable and transitional goals, varying in importance, that serve as principles in the life of a person or other social entity".</i>	(Schwartz, 1992, p. 4)
Hofstede	2010	<i>"Fundamental feelings about life and about other people".</i>	(Hofstede et al., 2010)
Elzo	2003	<i>"Criterion for social action that is adhered to emotionally rather than rationally (which is by no means to say that it is irrational), and which is not challenged in the short term."</i> Elzo also defines values as <i>"definitions of what is good and what is bad, what is acceptable and what is unacceptable, what is allowed and what is forbidden, what is to be done and what is to be avoided."</i>	(Elzo, 2003, p. 31-32)

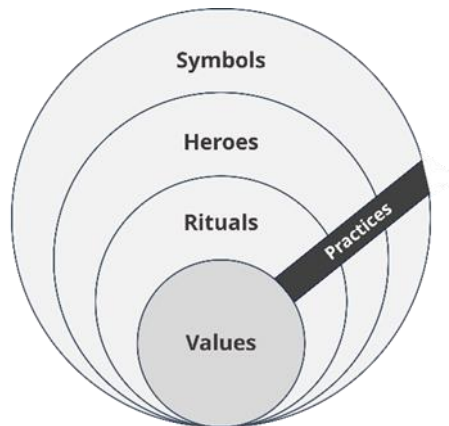
Source: Own elaboration

Similarly to the concept of "values", there are numerous definitions of culture and it has been an extremely difficult task for those who want to study it (Minkov et al., 2013). In fact, as early as 1952 Kroeber and Kluckhohn collected more than 200 pages with various definitions of the concept, which has also been developed since then (Kaasa, 2021).

However, one of the definitions that has prevailed, defines culture as a configuration of values and norms (Pettersson & Esmer, 2008a). Specifically from the economic field culture is defined as *"customary beliefs and values that ethnic, religious, and social groups transmit fairly unchanged from generation to generation"* (R. Fernández, 2011; Guiso et al., 2006). From sociology, Giddens defines culture as *"a way of life that characterises a society or social group and includes knowledge, customs, norms, laws and beliefs"* (Giddens & Sutton, 2015, p. 177).

The diagram of cultural onion developed by Edgar Schein is very illuminating to understand the relationship between culture and values as it reflects the layers or levels of culture (Schein & Schein, 2004, p.25). This conceptualisation is also followed by Hofstede (Hofstede, 2001, p.11).

Figure 2.1 Cultural onion by Edgar Schein



Source: Own elaboration based on Hofstede (2001)

2.1.2. Main characteristics

Despite, as we have seen, there are many diverse definitions for values, literature shows there are a number of common features that underlie most of the authors' conceptualisations. Penas Castro (2008) identifies the following seven characteristics (Penas Castro, 2008):

1. Values are "ideal projects". According to Penas Castro, *"happiness, identity, life project, ideal, utopia and values are all intertwined and inseparable realities"* (Penas Castro, 2008, p. 22). Zubieta et al. connect values with the desirable goals of the cultural group that an individual belongs to (Zubieta et al., 2012). In that line, values studies need to consider the differences between the desirable and the desired. The first, refers to ideology, to what is ethically right. The second, refers to more practical matters and is connected to the "you" and "me" (Hofstede et al., 2010, p. 28-29). Since values are intangible, they can only be inferred indirectly, by means of an individual's behaviour or verbalisation analysis.
2. Values are "options". As Rokeach's definition states (see [Table 2.1](#)), values are behaviours or states preferable to others. Ultimately, it is about the choice of one path over the rest of the alternatives.
3. Values are "beliefs". Values cannot be imposed (Argadoña, 2000) and they are learned (Hofstede et al., 2010; Schwartz, 2006). So as to be transmitted or modified, values require *"a dynamic process of perception, internalisation and analysis"*, they require a conscious acceptance of the belief in order to be acquired (Penas Castro, 2008). Values have also been defined as beliefs connected to emotions or not objective beliefs (M. de los Á. Bilbao et al., 2007).
4. Values are "characteristics of human action". They guide the conduct and behaviour of individuals and society and influence social norms. However, in order to interpret them correctly, it is important to understand that values are not the only factor influencing human behaviour; there are other factors, both circumstantial and environmental, that can lead to a behaviour that diverges from the individual's personal values (Rohan, 2000; Sen, 2004).

5. Values have a socio-cultural character. The ability to make decisions is a shared trait among individuals, and we all desire to independently shape our own life choices. According to Inglehart's research in 1997, our values are shaped within the socio-economic context of our generation, which in turn leads to variations in values across different generations, often referred to as a generation gap (see 2.1.6).
6. Values have a dual character, showing two poles. Examples of this are the cultural dimensions developed by Hofstede, or the conceptualisation of Schwartz (see section 2.1.4)
7. Values can be ranked hierarchically or in order of importance. There is a scale between values (Schwartz, 2006). Jacoby (2006) tries to demonstrate whether there is or there is not hierarchy among people's values. He introduces the term "Value ambivalence" as *"the inability to state that one value is unambiguously more important than another"* (Jacoby, 2006, p. 707). However, he concludes that according to his study, most people show a consistent value hierarchy in their choices. That being said, Frondizi (1958, 1992) already pointed out that *"it is easier to affirm the existence of a hierarchical order than to point out concretely what that order is or to indicate valid criteria that allow it to be established"* (Frondizi, 1956, p. 20).

In addition to the characteristics collected by Penas Castro, there are two additional features of values that gather a considerable consensus within academia, and that can be added to the abovementioned ones for the conceptualisation of values in the present thesis.

8. Values are transituational (Rohan, 2000; Schwartz, 2006) This characteristic is what distinguishes values from attitudes and preferences, which are necessarily tied to concrete situations (Nowack & Schoderer, 2020).
9. Values are variable. Culture and values *"do not sit still"* (Sen, 2004), they are in perpetual dynamic interaction with one another (Jenkin, 2016). The change does not necessarily mean a change in the value itself but a change in the "specific configurations of and relationships among values" (Pettersson & Esmer, 2008a, p. 4). Schwartz mentions that factors such as technological evolution, health crisis, or modifications in the economic situation can contribute to changes in cultural values, but he also recognises that, despite values are variable, modifications occur slowly (Schwartz, 2006). According to Inglehart and Welzel (2005), belief systems exhibit notable durability and resilience. Although values evolve, they reflect a societies cultural and historical heritage, implying change in values is path-dependent (R. Inglehart & Welzel, 2005a, p. 20).

Finally, with regard to the characteristics of values, it is important to mention that there are other highly debated features in academia. For example, this is the case with the universality characteristic of values. Many of the most recognised theories of values presuppose universality (e.g. Schwartz, Hofstede...) and there is indeed evidence in its favour; however, there is also a body of literature that criticises it, particularly for being irreconcilable with theories of cultural change (Nowack & Schoderer, 2020, p. 12-14).

2.1.3. Classifications of values

There are numerous and very diverse classifications of values, according to different criteria such as their positive or negative character, the subject who possesses them, the field or thematic area to which they refer, etc. (Nowack & Schoderer, 2020; Penas Castro, 2008). However, for the purpose of this dissertation it would not be of much added value to merely list each and every one of these classifications. Therefore, only two typologies of values are presented below for their particular importance in their development of the present work.

The first classification refers to **personal and social values**: values emerge in individuals and in collective, reason why it can be distinguished between personal values and social values. A value will be a social value, not only when it is shared by a substantial number of individuals, but to the extent that it is socially binding and is embodied in institutions, laws, customs, and behaviours. In addition, personal values do not need to coincide with social values necessarily (Argandoña, 2000). This classification coincides with the one coined by Rokeach, between individual and institutional values (Rokeach, 1979). This dissertation will focus on social values.

Personal and social values are not only types of values, but they are also layers of analysis of values. In this sense, certain studies distinguish not only the two levels of values (personal and national) that would be the equivalent, but they add a third layer of analysis of values, with the organisational level (Castro et al., 2017; Panizzon & Barcellos, 2019).

The second classification, also mastered by Rokeach, refers to **instrumental and terminal values**. Instrumental values are those that guide the conduct of an individual, such as obedience, ambition, honesty, or responsibility among others. Terminal values, on the other hand, are linked to final states of existence. Examples of terminal values include happiness, freedom, equality, or security. This classification in essence refers to what we want to achieve (terminal values) and how we want to achieve it (instrumental).

2.1.4. Values measurement frameworks

Culture, and its underlying elements such as values, are hard to measure (Schwartz, 2006), but there have been several attempts to develop measurement frameworks for both social and personal values. The most common avenue for measuring culture has been the elaboration of **surveys** (Alesina & Giuliano, 2015; Nowack & Schoderer, 2020).

In the following section, I will provide a brief overview of the value-system framework that have been most influential over time. In particular, I will succinctly navigate through the theory of Rokeach, Schwartz and Hofstede, and then move on to the main reference framework of this work, developed by Roland Inglehart. They all create their different set of values or dimensions.

Before diving into the different theories, it is important to point out that although the most common way of measuring values has been through surveys, there are authors who defend other types of methodologies for the exploration and analysis of values. Rohan (2000) argues that **content analysis of ideals and prototypes** can also be a valid method to infer the values of society (Nowack & Schoderer, 2020). Argandoña (2000) proposes **discourse analysis and observation of conduct** as the method to study values. Espedal et. al. (2022b) also mentions diverse qualitative methods such as participant observation, thematic analysis, narrative approach, case studies or action research have potential for exploring values. Following the formulation of this disclaimer, the importance of

which cannot be overstated given the employment of a mixed-methods analysis in this dissertation, the focus will now be directed towards the value theories with the most significant impact on the field, which have a quantitative optic.

Milton Rokeach (1973): Rokeach Value Survey

One of the first instruments that emerged to measure the importance of values was the **Rokeach Value Survey**, based on the theory that Rokeach developed in his book "The Nature of Human Values" (Rokeach, 1973) and was launched in 1982. The scale gave an enormous impulse to the studying of values, and it is still at use nowadays (Martí Noguera, 2011). The social psychologist distinguishes among two types of values: terminal and instrumental values (see section 2.1.3). The questionnaire presents 18 items per type of value and the task consists of giving each value a degree of importance, resulting in its hierarchisation. The purpose is therefore to analyse the hierarchy in the value-system of people that respond the survey. The configuration of values are unique to every individual (Tuulik et al., 2016).

Geert Hofstede (1980): Cultural dimensions theory

The Dutch social psychologist Geert Hofstede developed one of the most notable theoretical models of social values, based on a survey conducted among the employees and managers of the International Business Machines (IBM) multinational corporation, with responses from over forty countries at the first round. He not only analysed national cultures, but he also put the corporate or organisational culture at the spotlight.

As a result of the survey, Hofstede identified a set of "dimensions of culture". Dimensions can be defined as "*aspect of a culture that can be measured relative to other cultures*" (Hofstede, 2001; Hofstede et al., 2010, p. 31). At a first attempt, Hofstede's dimensions were limited to four: *power distance*, *collectivism versus individualism*, *femininity versus masculinity*, and *uncertainty avoidance*. This theory embodies very clearly the characteristic of duality of values, being every dimension a spectrum among two concepts, where national cultures can be placed.

In order to avoid the western bias criticism by the IBM Survey, a new questionnaire was developed named the Chinese Value Survey and was administered around the globe. This led into the finding of a new dimension that Hofstede named *long-term versus short-term orientation* (Hofstede et al., 2010, p. 38). At a later stage, thanks to the research of Misho Minkov with data from the World Values Study (coordinated by Inglehart), a sixth dimension was added: *indulgence versus restraint* (Hofstede et al., 2010). [Table 2.2](#) provides a definition for every pairing of the six cultural dimensions as construed by Hofstede.

Table 2.2 Hofstede's cultural dimension definitions

Dimension of culture	Definition	Source
Power distance	<i>"The extent to which the less powerful members of institutions and organisations within a country expect and accept that power is distributed unequally".</i>	(Hofstede et al., 2010) p. 61

Collectivism versus individualism	<i>"Individualism pertains to societies in which the ties between individuals are loose: everyone is expected to look after him- or herself and his or her immediate family. Collectivism as its opposite pertains to societies in which people from birth onward are integrated into strong, cohesive in-groups, which throughout people's lifetime continue to protect them in exchange for unquestioning loyalty".</i>	(Hofstede et al., 2010) p. 92
Femininity versus masculinity	<i>"A society is called masculine when emotional gender roles are clearly distinct: men are supposed to be assertive, tough, and focused on material success, whereas women are supposed to be more modest, tender, and concerned with the quality of life. A society is called feminine when emotional gender roles overlap: both men and women are supposed to be modest, tender, and concerned with the quality of life."</i>	(Hofstede et al., 2010) p. 140
Uncertainty avoidance	<i>"The extent to which the members of a culture feel threatened by ambiguous or unknown situations."</i>	(Hofstede et al., 2010) p. 192
Long-term versus short- term orientation	<i>"long-term orientation stands for the fostering of virtues oriented toward future rewards—in particular, perseverance and thrift. Its opposite pole, short-term orientation, stands for the fostering of virtues related to the past and present—in particular, respect for tradition, preservation of "face," and fulfilling social obligations."</i>	(Hofstede et al., 2010) p. 239
Indulgence versus restraint	<i>"Indulgence stands for a tendency to allow relatively free gratification of basic and natural human desires related to enjoying life and having fun. Its opposite pole, restraint, reflects a conviction that such gratification needs to be curbed and regulated by strict social norms".</i>	(Hofstede et al., 2010) p. 281

Source: Own elaboration based in Hofstede (2001)

Hofstede's conclusions have been supported by many large-scale studies developed after his work. For instance, it has been a very interesting framework to select culturally significantly diverse countries (Kirkman et al., 2006). Nonetheless, his work has faced numerous criticisms:

- Methodological gap. *"The questionnaire was not even originally developed to explore cultural values but instead to assess job satisfaction within IBM"* (Orr & Hauser, 2008; Sivakumar & Nakata, 2001; Weil, 2023)
- Insufficiency of data. Only six countries had a respondent count exceeding 1,000, while in 15 countries, the number of respondents was less than 200 (McSweeney, 2002; Weil, 2023).
- Lack of representativeness. The surveys were conducted exclusively with IBM employees, who have a higher than average educational level, and are therefore not representative of the country as a whole (Orr & Hauser, 2008).
- Over-homogenisation. The theory over-homogenises countries, leaving no room for individual and social group identities (Sivakumar & Nakata, 2001; Weil, 2023).
- Lack of time relevancy. Hofstede's data is already 40 years old, which makes it not sufficiently meaningful for current analysis. Moreover, it does not sufficiently reflect cultural changes (Orr & Hauser, 2008; Sivakumar & Nakata, 2001).

Shalom H. Schwartz (1994): Theory of personal basic values.

At the end of the 80s, a group of researchers led by Shalom Schwartz, also a social psychologist, from the USA, developed the next prominent conceptualisation of values named the “Theory of personal basic values”. Despite at first, they used data from the Rokeach Values Survey, they then proceeded into the designation of two own questionnaires: The Schwartz Value Survey (where respondents were invited to describe the level of importance of a list of 56 or 57 items connected to 10 values) and the Portrait Value Questionnaire (where respondents were invited to reflect their level of proximity to certain profiles assigned to specific values).

Schwartz distinguishes ten basic values or ten motivational profiles: universalism, benevolence, tradition, conformity, security, power, achievement, hedonism, stimulation, and self-direction (Schwartz & Sortheix, 2018). Values reflect the objectives or goals that people search for and that influence their action (M. de los Á. Bilbao et al., 2007).

On top of those ten basic values, there are two bi-polar dimensions, which explain the relationship between values. On the one hand, *Self-transcendence versus self-enhancement* refers to the dilemma of individual or personal orientation versus prioritising social or common good aspects. On the other hand, *Openness to change versus conservation* refers to the dilemma between values that emphasise readiness for change versus values that are connected to stability, security, and resistance to change (Schwartz & Sortheix, 2018).

As seen in Figure 2.2 values form a circular continuum, where the adjacent dimensions in the circle are most compatible, and least compatible with those opposing. As Schwartz himself recognises that is a characteristic of his conceptualisation that distinguishes it from Hofstede’s theory, where dimensions are independent from each other (Schwartz, 2006, p. 142).

Figure 2.2 Circular structure of the ten basic values by Schwartz



Source: Adapted from Schwartz & Sortheix 2018, p. 2

Interestingly, several studies have found that there is a gender gap in the conflict between self-transcendence and self-enhancement (Zubieta et al., 2006, 2012). Whereas women tend to show values closer to self-transcendence, harmony with others, equality and caring for the other's wellbeing, men are more likely to show values closer to power, dominance, achievement of their own goals, etc. (Zubieta et al., 2012). According to this data, women's values would be located more in the upper right part of the continuum and the bi-polar dimension, and men's values in the lower left part. This means women tend to be more socially focused than men in relation to this bi-polar dimension.

Similarly to Hofstede's survey, Schwartz's theory has not escaped criticism either. Some of the most expanded critiques are summarised below:

- *Deductive methodology.* Connected to the universality of values debate, one of the limitations of Schwartz's study is that values were conceptualised deductively, and not inductively, which means respondents could only answer from a set of values established beforehand, potentially missing additional values that were not deducted before (Nowack & Schoderer, 2020).
- *Complexity.* Methodological critique includes difficulty for respondents to answer the questionnaire (as before rating them, they need to go through the entire list of 30-27 values to choose the most important) or difficulty to translate the equivalent terms to different languages (Lee et al., 2008).
- *Bias.* Since it is a rating scale, certain negative aspects can arise, as the tendency of people to consider most values as important in life, leading to biased responses (Lee et al., 2008).

Roland Inglehart (1997): World Values Survey and European Values Study

The focus of Inglehart's theory is the studying of the change in values and the impact in social and political life. For this purpose, two instruments were developed. Since its launch in 1981, the World Values Survey (WVS) has had 7 waves, collecting data from 100 countries all over the world, including 90% of the world population.

The last wave (2017-2021) included 14 thematic sections according to its website, including: social values, attitudes & stereotypes (45 items); societal wellbeing (11 items); social capital, trust and organisational membership (49 items); economic values (6 items); corruption (9 items); migration (10 items); post-materialist index (6 items); science & technology (6 items); religious values (12 items); security (21 items); ethical values & norms (23 items); political interest and political participation (36 items); political culture and political regimes (25 items); demography (31 items) (WVS Database, 2023).

Alongside the WVS, its European equivalent, the European Values Study (EVS) was also launched in 1981, and is conducted every nine years. Its topics cover human values related to life, family, work, religion, politics, and society. The number of participating countries in Europe grew from the initial survey to the fourth wave in 2008, reaching 47 countries. The fifth wave (2017-2020), included a smaller participation (with 37 countries), but minorities and regional analyses were conducted, such as in the Basque Country (*Participating Countries*, 2018).

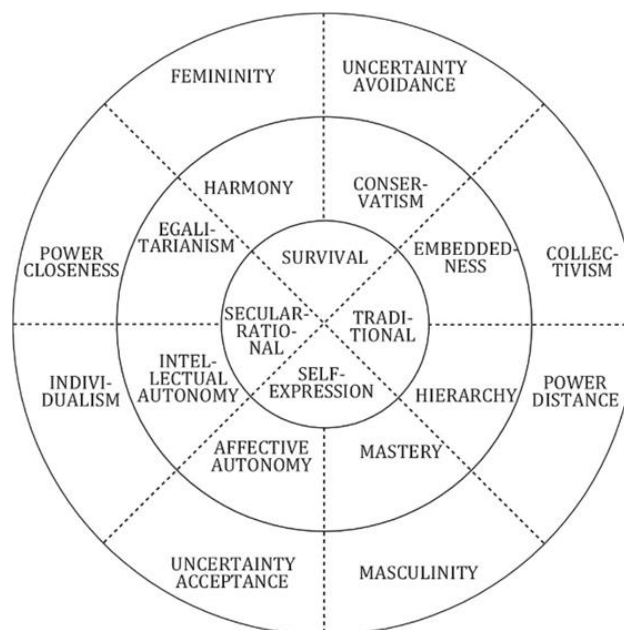
Since Inglehart's framework and EVS data will be used to conduct the analysis in the present thesis, we will dedicate a section to present and analyse the main conclusions from Inglehart's work (see 2.1.5) as well as criticism to his work.

Other value frameworks of interest:

- *Typology of Basic Human Values by Gouveia (1998)*: As Martí Noguera (2011) describes, Gouveia identifies 24 basic human values building on Maslow's Hierarchy of Needs (1954). The questionnaire consists of the ubication of each value at a scale of 1 (not important) to 7 (highly important).
- *Gordon's Survey Personal Values by Leonard and Gordon (2003)*: "The SPV provides measures of the relative importance of six areas of personal values - Practical mindedness (P), Achievement (A), Variety (V), Decisiveness (D), Orderliness (O), and Goal orientation (G). It uses a forced-choice format, and the instrument consists of 30 sets of three statements." (L. V. Gordon, 2003).
- *List of Values of the University of Michingan Survey Research Centre*: The Centre identified those values that could be linked to the primary objectives of life, resulting in a list of nine values (self-respect, security, warm relationships with others, sense of accomplishment, self-fulfilment, sense of belonging, being well respected, fun and enjoyment in life, and excitement). The task to be developed is the ubication of the values in a scale of 1 (very insignificant) to 9 (highly significant) (Castro et al., 2017).
- *Global Leadership and Organisational Behavior Effectiveness Project (GLOBE Survey) (2006)*: The study aims at learning more about organisational and leadership dynamics in different national cultures. The questions the respondents need to fill in also follow a scale logic (GLOBE Project, n.d.).

There have been numerous efforts in the literature to compare and identify relationships between the models of the different authors (Beugelsdijk & Welzel, 2018; Dobewall & Strack, 2013); and even recent efforts such as Kaasa's (2021) attempt to unify them into a single value system (see [Figure 2.3](#)).

Figure 2.3 Similarities between Inglehart, Schwartz and Hofstede frameworks (by Kaasa)



Source: Kaasa, 2021

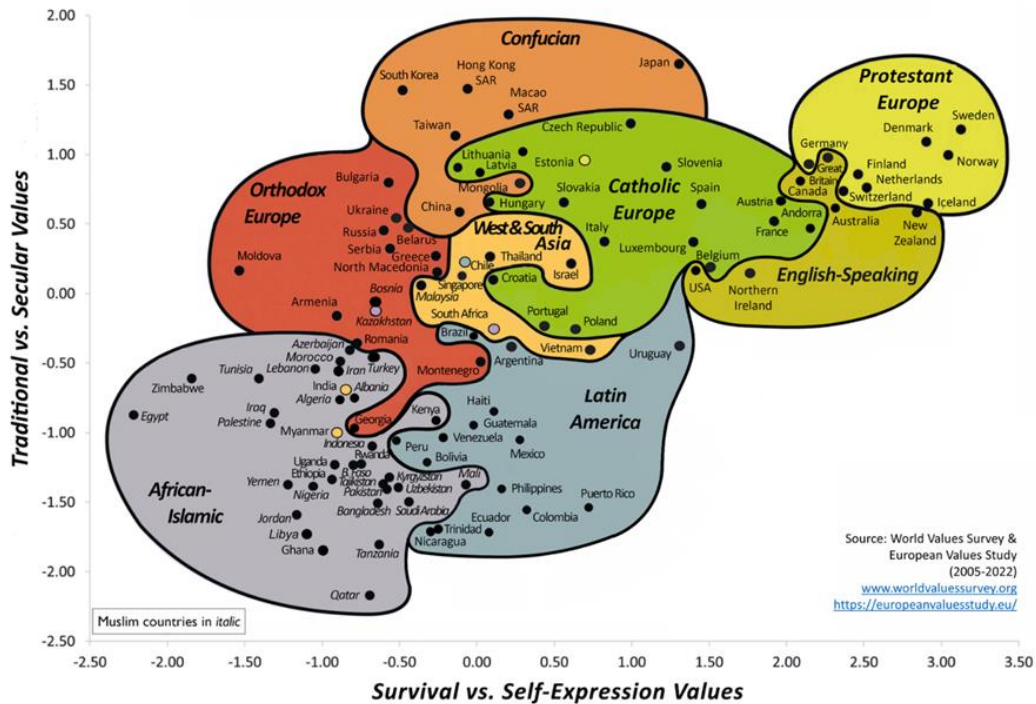
Hofstede himself already initiated a dialogue between the various analytical models, since, in addition to the GLOBE questionnaire, he used data from Inglehart's World Values Survey to complete his model of the cultural dimensions. Likewise, Schwartz contrasted his framework, for example, with the work of Inglehart and Hofstede (Schwartz, 2006, p. 150). Inglehart, for his part, presented what he called the "super-dimension", which includes three dimensions developed under very different theoretical frameworks: survival/self-expression values by Inglehart-Welzel, individualism/collectivism by Hofstede and autonomy/embeddedness by Schwartz. According to Inglehart, the "super-dimension" explains 81 percent of the cross-national variation in culture and values (R. F. Inglehart, 2018).

Thus, dimensions are instruments of researchers to better understand reality, but dimensions themselves are not real (Kaasa, 2021; Minkov et al., 2013). They are artefacts that help explain culture in a more comprehensive way. They are also tools to connect culture with other social, political, and economic phenomena, and gain insight and make recommendations (Kaasa, 2021; Tuleja & Schachner, 2020). However, there is no ideal cultural dimensions or values framework that will perfectly solve all research questions, but rather **researchers will have the duty to choose between the tools available to them that best fit each context** (Tuleja & Schachner, 2020). For the purpose of the present dissertation, Inglehart's Evolutionary theory and the WVS/EVS instruments will be the reference framework for studying values, reason why it will be explained more in depth in the following section.

2.1.5. Evolutionary modernization theory (Inglehart)

The two major dimensions that explain cultural differences across territories according to Inglehart and Welzel are the spectrum of survival values versus self-expression values, and traditional values versus secular-rational values. The first explains the level of autonomy that an individual has, from little autonomy being embedded in kinship obligations society in life planning, to a high individual autonomy in decision-making. The latter, reflects the extent in which religious doctrine influences society or not (R. Inglehart & Welzel, 2005a). [Figure 2.4](#) reflects the distribution of the world according to the two axes.

Figure 2.4 The Inglehart-Welzel World Cultural Map 2023



Source: [Worldvaluessurvey.org](https://worldvaluessurvey.org)

As Figure 2.4 shows, eight cultural zones emerge when placing countries in the axes: Protestant Europe, Catholic Europe, the English-speaking countries, Latin America, Africa, the Confucian countries, South Asia and Eastern Europe/Orthodox. The map implies that national level is still important and shapes the values.

Survival vs. Self-Expression Values

Classic modernization theory (Karl Marx) argued that economic development brings predictable social and political changes. However, this was really controversial, as human behaviour is influenced by a plethora of factors, making it very difficult to make deterministic predictions of the future that are realistic (R. F. Inglehart, 2018, p. 10).

According to Inglehart in his evolutionary modernization theory, *"social change is not deterministic, but some trajectories are more probable than others"*. A society's culture is shaped by the extent to which its people grow up feeling that survival is secure or insecure. In case of the first, a shift from survival values to self-expression values occurs and this leads to an increase in values connected to individual autonomy such as tolerance and cultural openness, environmental protection, gender equality, free choice, democratic institutions, and more liberal social legislation (R. F. Inglehart, 2018, p. 9-13).

One component of the major shift from survival values to self-expression values is the shift from materialist values to postmaterialist values, what Inglehart referred to as the silent revolution. Materialist values are those that refer to order and economic stability. Post-materialist values refer

to items such as free speech and political participation (R. Inglehart, 1977, p. 29). The materialist/postmaterialist scale is configured over two main hypotheses:

- *The scarcity hypothesis.* This hypothesis states that the necessities that at a key point in time have failed to be covered tend to attract an individual's priorities (Silvestre, 2021, p. 134). The important factor is not the per capita income itself, it is how an individual perceives security throughout his life, the subjective sense of existential security (R. F. Inglehart, 2018, p. 15).
- *The socialisation hypothesis.* According to this hypothesis, core values crystallise more strongly before adulthood (Silvestre, 2021). Hofstede also agreed that "*values are programmed early in our lives*" (Hofstede, 2001, p. 6). Some authors point out directly at the adolescent years as core years for socialisation and value formation (Pettersson & Esmer, 2008b, p. 250). Family is therefore one of the key agents in the modulation of values. Substantially, values are transmitted from one generation to another, and this leads to a time-lag between economic changes and value change of approximately 50 years. This characteristic was named as the "cultural lag" coined for the first time in 1922 by the American sociologist William F. Ogburn, who defined it as a lack of synchronicity between material conditions and culture, which can last for several years (Pettersson & Esmer, 2008a). Values reflect both what we are taught and our living experiences (R. Inglehart & Welzel, 2005b, p. 2).

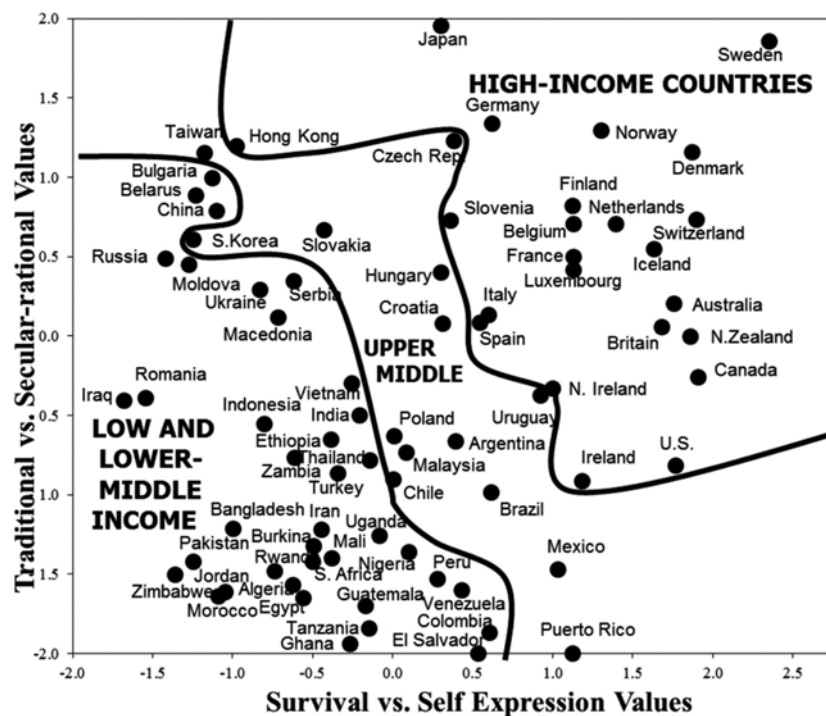
One of the most important criticisms to Inglehart's theory has been precisely linked to the socialisation hypothesis. His theory is accused of failing to consider the human development perspective, arguing that the system of values of a person is not fixed once a person is adult. Instead, according to them, the value system is highly dependent on time and different life stage cycles. Thus, value change between generations reflects life-cycle effects and not intergenerational change, since young cohorts usually prefer postmaterialist values, but as they age, they would become more materialist (Tufis, 2000). This criticism has been confronted by WVS data (R. Inglehart & Welzel, 2005a).

The evolutionary **modernization theory** points out that the younger the age the higher post-materialist values a person will have. Analysing it with EVS data, this theory has been proved as right in the Basque Country (Silvestre, 2021, p. 147). According to the latest wave of surveys, this theory is also true on a global level; however, it seems that in Western countries the trend has stalled as the new generations are no more post-materialistic than the post-war generations (R. F. Inglehart, 2018, p. 29).

Another aspect that has been highly analysed is the **role of education** in modernization. Weber thought that secularisation and education caused modernisation of people's worldviews. Inglehart does not contradict this theory but adds that emotions and subjective perspectives on lived experiences (such as security) are at least as important as education in shaping people's values (R. F. Inglehart, 2018). Analysing WVS data, Inglehart affirms "*there is much more difference in the degree of emphasis on Self-expression values between the highly educated people of different nations, than between the highly educated and the general public within given nations*" (Inglehart, 2018, p.19).

Education, is therefore, a key driver for supporting individual-choice norms when the level of existential security is already high and has a more discrete role in countries with low existential security (Inglehart 2018) (see Figure 2.5). This also collides with the idea that has been the predominant in economics and politics which argues that human behaviour is a conscious choice designed to maximise utility. Other approaches such as behavioural economics have started to be increasingly influential, and they include emotional and cultural factors when analysing individual's economic behaviour and consumer attitudes.

Figure 2.5 Economic Development and Value Change World Map



Traditional values vs. Secular values

As briefly mentioned above, traditional values refer to those values connected to the religious background of every country. Secular values are those that emerge once religion does not have such an impact in the society. In line with the characteristics of values, they can vary but it is important to mention that cultural change exhibits a path-dependent nature, as it evolves over time and maintains its unique trajectory.

In post-industrial societies, there has been a rapid transformation occurring, and they are collectively progressing towards a common direction. This shift in cultural norms within post-industrial societies marks a transition from 'Pro-fertility Norms' to 'Individual Choice Norms.' Interestingly, it is economic levels rather than growth rates that serve as the primary indicator for the increasing support of these individual-choice norms. In the past, it was religion but also the economic reality that supported pro-fertility norms, as children were an economic liability for the family.

However, it is noteworthy that despite this shared trajectory in post-industrial societies, empirical evidence reveals that the cultural distinctions among these societies remained as significant in 2014 as they were back in 1981, suggesting the persistence of cultural diversity (Inglehart 2018, p. 42). In this context, it's worth mentioning that Inglehart does not foresee the disappearance of religion in these evolving societies (see [Figure 2.4](#)) (Inglehart 2018, p. 75).

2.1.6. Values: a generational perspective

In line with the socialisation hypothesis of Inglehart, childhood and adolescent years are an essential time to crystallise values. Therefore, it seems logical that those who were born in a similar period will have similarities in value prioritisation. Here is where the generational perspective acquires relevance in connection to values.

There is no consensus regarding the delimitation of generations. Some authors affirm there is a generation every X number of years, even if there is also no clear agreement on the number of cohorts conforming a generation (Pettersson & Esmer, 2008a). In the recent years, due to globalisation and the rapidly changing environment, there has been a reduction in the cohort number within generations, and there has also been a homogenisation on the characteristics of the different generations (at least in the Western countries) (Fishman, 2016; T. Francis & Hoefel, 2018).

Meanwhile, other authors consider that important historical and events or technological transformations are what determine generation shifts. In that case, the birth years of the different generations vary depending on the context or country. This means that, for instance, birth and arrival of the internet to each country is what would mark a generation shift, which would be earlier in the USA than in Europe. With the second interpretation, a generation can be defined as *"a group of people roughly the same age who experience and are influenced by the same set of important historical events at key periods in their lives, usually in late childhood, adolescence and early adulthood"* (Laskowska & Laskowski, 2022).

Table 2.3 Delimitation of generations

Generation name	Short explanation (Soriano & Ortega, 2021)	Reference birth years (USA)		Reference birth years (Spain)	
Silent generation	It is a generation deeply marked by economic and war crises. They suffered the Great Depression of 1929 and the two world wars. In Spain, the term "post-war children" is used because of the Spanish civil war.	1925	1945	1930	1948
Baby boomers	In contrast to the previous generation, they were born after the Second World War, in a context of peace and economic prosperity. With the economy booming and infant mortality rate falling, this is what dictated the name of the generation. In Spain, this phenomenon occurred slightly later.	1946	1964	1949	1968
Generation X	A generation at the time largely unknown, who suffered the pinnacle of consumerism and the obsession with success at all costs. In Spain, this generation was demarcated with an increasing political opening of the country. It is also known as the "EGB" generation.	1965	1979	1969	1980
Millennials	A generation marked by economic depressions that have particularly affected their professional or job development, with consequent frustration.	1980	1994	1981	1994
Generation Z	They are the digital native generation, since the internet was already massively deployed from the time they were born.	1995	2010	1995	2010

Source: Own elaboration, adapted from Pew Research Centre and Soriano & Ortega, 2021

Generational characteristics impact values, attitudes, lifestyles, vital priorities, consumption, leadership, and in general, all the life spheres of an individual (Fishman, 2016). [Table 2.4](#) summarises how each tends to behave in different spheres, such as personal traits, in the labour market, as a consumer and leadership type supported. This analysis is done for the four generations that occupy the majority of our population, being aware that there are people who belong to the "silent generation" and also to the Alpha generation, those born from 2010 onwards.

Table 2.4 Characteristics of each generation

Generation	Personal trait	Labour market	As consumers	Leadership style
Baby boomers	Desire to prolong their youth.	Like to be in control and desire for learning and self-improvement.	Inclination towards savings	Direct order
Generation X	First generation that will not live a better life than their parents, mainly influenced by the blocking of the labour market by the large number of baby boomers.	- They value a balance between work and private life. - Enterprising and experience driven.	Look for status	Coordination
Millennials	- First generation since 1943 to see themselves as part of a group and not exclusively as individuals. - First generation to have grown up in the digital world. - Committed to change for the better (e.g., feminist movement).	- Want to get into leadership positions quickly and early. - Value individual recognition and need continuous positive feedback. - Seek purposeful careers	Look for experiences	Guidance
Generation Z	- True digital natives - Good at analysing diverse sources of information and integrating virtual and face-to-face environments. - Pragmatic and realistic - Value individual expression and reject labels. - Inclusive and belong to different groups	Self-taught, they advocate for online learning.	Consumption as an expression of personal identity and support for ethical consumption	Empowerment Dialogue as the tool for conflict solving.

Source: Own elaboration based on the following studies: (S. Fernández, 2019; T. Francis & Hoefel, 2018; Iberdrola, -; Schwbel, 2020)

2.1.7. Social values and wellbeing

In order to respond to the aim of the present dissertation and understand the influence of values in competitiveness for wellbeing model, it is essential to review the existing literature regarding the connection of values (both individual and social) with the two concepts (competitiveness and wellbeing) separately, since they have a longer-term development academically in such manner.

Regarding the interface between values and wellbeing, two main intersections can be distinguished: on the one hand, values and wellbeing; and on the other hand, values and the welfare state. The following section will dig deeper into these two literature streams to clarify how they interact.

2.1.7.1. Values and wellbeing

'The importance of human values and relational life for economic health and subjective well-being is still largely underestimated and is a fascinating field for future research'.

(Becchetti, Bruni & Zamagni, 2015, p. 133)

Cultural relativity implies that people have different values, and therefore, different ways of assessing the success or failure of a society, depending on the level of attainment of their values. Subjective wellbeing (henceforth, SWB) precisely represents the extent to which each individual feels their values are accomplished (Diener & Suh, 2009).

Most of the frameworks that attempt to measure wellbeing define a set of "dimensions" of wellbeing. These typically include one subjective wellbeing dimension (be it happiness or life satisfaction) and a set of "objective" aspects such as education, employment, environment, and social life/community, among others. Most indices give equal weighting to the different dimensions, i.e. they understand that employment and environment contribute equally to wellbeing, and so do other dimensions.

However, in one of the recent developments of the OECD's *How's Life Index*, a new feature has been included to the online platform of the index where they display available data: the user is allowed to weight the different dimensions according to the personal importance and build a personalised index. This practical example shows the OECD's understanding that the importance of the different wellbeing dimensions can vary depending on the person and the place or culture that they belong to, proving a **connection between personal or social values with the weight of the different objective wellbeing dimensions**.

Apart from this connection between values and the more objective part of wellbeing, there is a wide body of literature seeking to explore how values and SWB are intertwined, particularly in the psychological field. A large part of the academic publications analysing this interconnection makes use of Schwartz's values framework. There are three main theories of how value priorities influence SWB: congruity theory, direct relations theory, and theory of values priorities as moderators of SWB (Schwartz & Sortheix, 2018).

Direct relations between value priorities and SWB

This approach implies that supporting certain values reflects higher wellbeing *per se*, and therefore, there are the so-called “healthy” and “unhealthy” values. This approach is coherent with the self-determination theory by Deci and Ryan (1985), which states that satisfying intrinsic needs provides higher or more positive wellbeing than pursuing extrinsic goals. Values connected with personal growth, social interactions and community contribution are those linked to intrinsic goals (Oishi et al., 1999), whereas power, control, status, and money (connected to external sources of validation) fall into the category of extrinsic goals (Burr et al., 2011). Building on the above, there is certain evidence that confirms the direct association between values and SWB connected to individualist values. For instance, according to a study conducted by Bilbao, Techio and Páez (2007) with students, their families and migrants in Spain, there is certainty that individualist values such as openness to change (as for Schwartz’s framework of values) are associated with higher levels of happiness and SWB (Bilbao et al., 2007).

The most significant study analysing direct association is the one developed by Sagiv and Schwartz (2000) and concludes that there are certain values that contribute more inherently to SWB. The relation is more to the affective part of SWB than the cognitive part. As for concrete values connected to Hofstede’s framework (see 2.1.4) and their association with wellbeing, self-direction, achievement, stimulation, benevolence, and universalism had been previously regarded as “healthy values”, whereas tradition, conformity, security and power values as unhealthy. The study concluded that no evidence was found to assign benevolence and universalism values as “healthy” and power values as “unhealthy”, and limited support for inferring the rest (Sagiv y Schwartz, 2000, p. 195).

Certain authors add moderators to the direct relationship, including, the level of human development in a country (Sortheix & Lönnqvist, 2014), cultural egalitarianism (Sortheix & Schwartz, 2017), or cultural factors and environmental threat (e.g., disease, wars), both in a single manner or jointly (Schwartz & Sortheix, 2018).

Congruity theory between value priorities and SWB

This approach implies that values report higher subjective wellbeing to the extent that they are congruent with the environment in which the individual interacts. This means that, the closer the individual’s values with the environment, the higher the SWB, and the opposite, the higher the value dissonance with the environment, the lower SWB. According to Morrison & Weckroth (2018) the level of SWB will depend on the intensity with which people hold their values in comparison with the average (Morrison & Weckroth, 2018).

There are three mechanisms through which congruity theory manifests (Sagiv & Schwartz, 2000):

- *Environmental affordances*: “Affordances are relations between the environment and an agent that allow for emergent opportunities for patterned action” (Emergent Futures Lab, 2023). Congruent environments provide people with opportunities to realise their values and goals in life.

- *Social sanctions*: This mechanism connects directly with the differences between personal and social values, or individual and institutional values by Rokeach (see 2.1.3), as values, when they are shared by a substantial number of individuals in an environment, they become socially binding and embodied in institutions, laws, customs and behaviours. Thus, values contrary to the environment will most likely involve implicit or explicit sanctions. For example, in environments with a strong sense of hierarchy (or high-power distance according to Hofstede), people with more egalitarian values might suffer from exclusion or discrimination in their workplace if they show disconformity with their boss.
- *Internal conflict*: This conflict occurs when the values acquired by an individual (earlier in life, in another environment...) are not compatible with the values shared in a new environment. The values collision will place the person at an uncomfortable position, lowering its SWB. For instance, a person who has grown up and lived in a rural environment may experience internal conflict when moving to a city or urban environment, facing a much more complex cultural relativism and diversity.

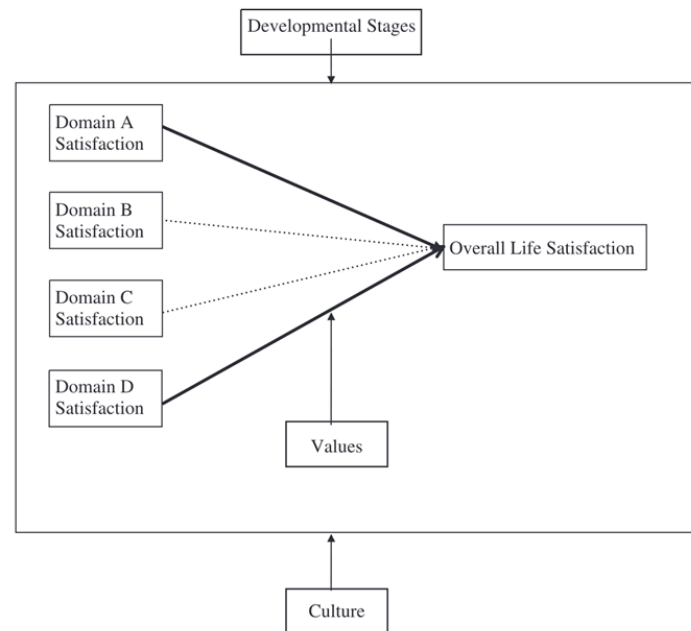
Following the study mentioned above of Bilbao et al. (2007) congruity theory is confirmed in individualist and collectivist values, as the results show that individualist values associate less strongly with wellbeing in collectivist environment (Bilbao et al., 2007).

In addition to individual and national level analysis, this approach has also been analysed at the organisational level. For instance, according to a study by Leiter & Maslach (1999) congruity of personal values with values from colleagues reported higher wellbeing at work (Schwartz & Sortheix, 2018).

Value priorities as moderator to SWB

In a 23-day daily diary study, Oishi et al. (1999) found that “people gain a sense of satisfaction out of activities congruent with their values” (Oishi et al., 1999, p. 163). Sortheix and Schwartz denominate this approach as attaining valued goals and subjective wellbeing.

Figure 2.6 Values Influencing the Sources of Subjective Wellbeing



Source: Oishi et al. (1999)

Despite there is a body of literature analysing the relationship between values and SWB, particularly on the psychology field, several questions remain unanswered. Some of the aspects that remain to be tested are other moderators of the relationship between values and subjective well-being such as age, gender, or individual characteristics such as identity. Studies have been conducted with various age groups, analysing both younger cohorts (M. Bilbao, 2008; M. de los Á. Bilbao et al., 2007; Sagiv & Schwartz, 2000), older cohorts (Burr et al., 2011), and a generational perspective (Twenge et al., 2012), and gender perspective (Zubieta et al., 2006), but not as moderators of the association.

Similarly, the **causality** between values and SWB also remains unclear. "Because values change quite slowly and only in response to major changes in life conditions whereas SWB is more volatile, it seems more plausible to expect causality to flow primarily from values to SWB" (Sorthaix & Schwartz, 2018, p.12). One study looking particularly at the causality between SWB and materialistic values points to a reciprocal causality (Solberg et al., 2004).

A final aspect to note in this area, which must be considered, is precisely something that embodies the classic prisoner's dilemma: what is best at the individual level (the increase in SWB), does not necessarily have a positive impact on collective or group well-being. There is a large interdisciplinary literature that aims at tackling "individual-group discontinuity" or "**cultural isomorphism**", which indicates that individual level analysis might not be extrapolated to national or collective level analysis of values and vice versa (Steel et al., 2018).

2.1.7.2. Values and the Welfare State

"Those who deny any significant relationship between culture and welfare policy take a lonely position".

(van Oorschot, Opielka & Pfau-Effinger, 2008, p. 1)

Similarly to the influence of values on SWB, welfare state and its policies are also shaped by values, particularly the values shared in the community (culture) where it is built. The connection between culture and welfare state policies is complex and of multilevel nature (Pfau-Effinger, 2005, p. 16); reason why the purpose of the following section is to disentangle the existing academic knowledge on this connection.

Pfau-Effinger (2005) distinguishes three levels in which welfare state policies and cultural values interact: first, values as a basis for policies; second, cultural values and models which predominate in the population; and third, discourses on cultural values and ideals (Pfau-Effinger, 2005).

- *Values and models as a basis for policies.* Every legal system has at its core a set of values and principles which act as the foundation of the legal system as a whole. Those values and principles have a strong connection to the societal context where they have been developed.
- *Cultural values and models which predominate in the population.* There are different attitudes of the population regarding welfare state; the view of the majority will prevail, owing to the nature of our electoral system. Elected candidates will represent that majoritarian view, translating it to the welfare state policies.
- *Discourses on cultural values and ideals.* Political and public discourses serve as intermediaries between potentially opposing cultural attitudes within the population and political decisions (Pfau-Effinger, 2005, p. 10). Depending on the power of the actor, discourses may be used as tool in order to gain legitimacy towards an unpopular political decision.

Underlying the first two levels is the idea of directionality from values to the welfare state. However, as showed by the third level by Pfau-Effinger, the relationship is not merely unidirectional. Some authors argue that social policies can also influence values. For instance, Murray in his book *Losing Ground* argued that welfare benefits contributed negatively to the population's work ethic and family values (Murray, 1985).

In this matter, particular relevance should be given to the concept that combines the connection between values and welfare state: welfare culture. It is defined as "the relevant collective meanings in a given society surrounding the welfare state, and to the way the welfare state is embedded in society. The welfare culture comprises doctrines, values, and ideals in relation to the welfare state and thus defines the ideational environment to which the relevant social actors, the institutions of the welfare state and concrete policy measures refer" (Van Oorschot et al., 2008, p. 11).

Some of the characteristics of the welfare culture are its place-dependency, or contextual nature, together with its ambivalent and contradictory nature (Pfau-Effinger, 2005; van Oorschot et al., 2008). The latter is explained as different social groups located in the same territory can have different welfare cultures, however, as stated above, the majoritarian perspective will most likely be the one to prevail. Similarly to the general framework of values, welfare culture is also transmitted from one generation to another, particularly, in the family context (Dahl et al., 2014).

The key elements of welfare culture comprise, among others, the positionality toward waged work and labour market, social inclusion/exclusion dynamics, redistribution, property and caring system and social services (including the role of family) (Pfau-Effinger 2005). EVS and WVS have been really useful to analyse several of the key elements of welfare culture across different places, including, the view of society towards poverty (Walker, 1992), or what societal groups deserve more state support (immigrant, elderly, young people, etc.) (van Oorschot et al., 2008).

Esping-Andersen (1990) developed a typology of welfare states. This typology is not only not contradictory, but it is complementary to the varieties of capitalism theory (Hall & Soskice, 2001; Schröder, 2013). The model is defined by two main perspectives, depending on whether the focus is on the production regime (= variety of capitalism) or the model of (re)distribution of economic wealth (= welfare model). Each of these models offers a distinct perspective on the configuration of the dimensions of welfare and economic-business performance (e.g. private, public, public-private).

These perspectives are informed by prevailing values that are shaped by historical roots, political style, and political style. Liberal states, which value freedom as the predominant value underlying the whole system; social democratic states, valuing equality; and conservative states, which value stability (Esping-Andersen, 1990; Schröder, 2013; van Oorschot et al., 2008). This goes in line with the first level of influence of values in social policies.

In a similar vein, Ferrera (1998) distinguishes four different welfare culture models or geo-social families: the so-called four “social Europes”. The variables analysed in order to develop the typologies are the following: eligibility criteria for benefits, benefit *formulae*, financing regulations and organisation-managerial arrangements (Ferrera, 1998). The results are logically highly congruent¹⁰ with the varieties of capitalism and welfare models analysed globally. In Europe four models can be found:

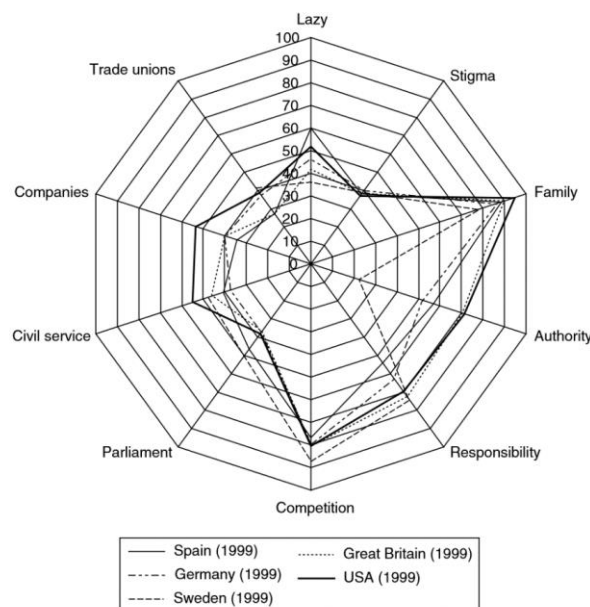
- Scandinavian model with universal protection.
- Anglo-Saxon countries, where welfare state is highly inclusive but full coverage is only available in the health domain.

¹⁰ The only different with the welfare states typology in Europe (TiPSE. ESPON, 2014) is that the latter encompasses a fifth model, the post-socialist model in the East of Europe.

- Continental countries (including Germany, France, Benelux, Austria and Switzerland), with link the work position with social entitlements.
- Southern European countries (including Spain, Portugal, and Greece), where there is a lack of homogenous development, but have strong connections with continental regimes (Ferrera, 1998).

Using the framework of the four “Social Europes” as a reference point, Walker (2008) in a comparison between European and American welfare values, and using WVS data, finds that despite there are differences in welfare cultures and institutions, basic values show small variance across the different models (Walker, 2008, p 126).

Figure 2.7 European and American welfare values (Walker, 2008)



Source: Walker, 2008

Also building on Esping-Andersen’s work, efforts have been made to analyse particular aspects of the welfare system, and in particular, the concepts of care, social care, gender roles and familiarism (Daly & Lewis, 2000; Saxonberg, 2013), even reaching a conceptual development of typologies of familiarism (Leitner, 2003).

When undertaking cross-national comparisons and developing typologies, it is essential to recognise that all welfare states forming the “model” do not form a single and coherent unity (Pfau-Effinger, 2005). Each welfare state has its own specificities and welfare arrangements, sometimes interlocking. Typologies serve as useful comparative tools, as long as they do not lead to failure to take account of place-based specificities can lead to major errors and unfounded generalisations.

Welfare arrangements also operate at regional and local levels, which creates further territorial specificities (Gelissen, 2008; Pfau-Effinger, 2005). For instance, Spain is a decentralised welfare state where the 17 regions (including the Basque Country) have exercised diverse policy options, leading to the emergence of different territorial welfare regimes, but under the umbrella of common values and principles (Gallego & Subirats, 2012).

In addition, the welfare models do not sit still, they are alive, and changes in social policies and reinterpretations are taking place. For instance, according to Peng (2008), several Asian countries, such as Korea, have proved a tendency to align with Continental and Nordic European welfare models (Peng, 2008).

2.1.8. Social values and competitiveness

In addition to exploring the connections between values and wellbeing, understanding how values influence visioning processes within the theme of competitiveness for well-being requires a focus on the relationship between values and competitiveness, primarily understood as economic development. Therefore, this section briefly reviews what the literature says about the importance of culture for the economy and highlights key findings on which values have the most significant economic impact.

2.1.8.1. The cultural turn in economics

Spatial concentration of firms and capital, agglomeration effects and innovation have constituted a significant portion of the theoretical advancements in the field of regional development (I. R. Gordon & McCann, 2005; Huggins & Thompson, 2017). However, contemporary economic theory is increasingly recognising the role of individual and collective behaviour as determinants of economic outcomes (Huggins & Thompson, 2017, p. 16). This is not a novel phenomenon; rather it represents a comeback of certain concepts that classic economics frequently incorporated into their theories.

Adam Smith addressed ethical and philosophical questions in his book *The Theory of Moral Sentiments* (1759). For Karl Marx, religion was a consequence of the prevailing socio-economic structures. Max Weber, conversely, saw (Protestant) religion of outmost importance for the development of capitalism (Guiso et al., 2006, p. 26). Specifically, for Weber values promoted by the Protestant ethic such as hard work and investing one's earnings rather than spending them favoured capitalism (Rutten & Gelissen, 2010). It can be observed that the direction of the causal relationship varies according to the author: while Marx posits that economic factors drive the formation of cultural norms, Weber suggests that cultural factors influence economic processes.

After World War II, whereas other disciplines were influenced by authors arguing the importance of non-economic factors, economists focused on mathematical sophistication, losing interest in variables such as culture, particularly due to its difficulty for quantification (Guiso et al., 2006). This led to authors from other disciplines taking the lead in studying the relationship between culture and economics during this period, notably the work of Putnam (1993) with the effect of culture in the quality of political institutions and the concept of "social

capital", or the work of Fukuyama (1995) first introducing trust as a component of economic development (Guiso et al., 2006, pp. 26–28). The notion of trust is what influenced most the economic discourse, leading to the "cultural turn" in economics (Beugelsdijk & Van Schaik, 2005; Knack & Keefer, 1997).

As a result of this turn, cultural elements such as social values have been incorporated into the economic debate, and also elements of psychology, such as personality traits, and how they influence behaviour (Huggins & Thompson, 2017, p. 17). Values such as tolerance and non-traditional lifestyles have been found to be associated with economic development (Florida, 2012; Storper, 2013). "Florida hypothesises a link, albeit an indirect one, between bohemian lifestyles and economic development (...) Bohemians hold social values that express hedonism, non-conformism and a dislike of large organisations and bureaucracy" (Rutten y Gelissen, 2010, p. 926).

In sociology, modernisation theory has played an important role in the explanation of cultural change, as it states that continued economic development predicts changes in norms and values (R. Inglehart & Welzel, 2005a). The structural change from industrial to post-industrial society, impacts in an increase of self-expression values, replacing self-restraint (R. Inglehart & Baker, 2000; R. Inglehart & Welzel, 2005a). However, according to Inglehart and Baker (2000), and confirmed by Inglehart and Welzel (2005a) afterwards, the cultural and historical path continues to influence national cultures, leading to diverse paths to modernity (Beugelsdijk & Welzel, 2018, p. 1476). In other words, the correlation works both ways, economic development promotes a modernisation of values, and, at the same time, modernist values promote achievement of economic development (Rutten y Gelissen, 2010, p. 925).

Another line of development in the field of literature has been the increasing recognition of the economic value of culture. In this sense, David Throsby (1999) proposed the concept of cultural capital building on Bourdieu's work. Cultural capital is added to the three widely recognised capitals of natural, human and physical capitals, and encompasses the "stock of cultural value embodied in an asset" (Throsby, 1999, p. 6), which can be tangible or intangible. For Throsby, the maintenance and investment on cultural capital serves to reinforce cultural systems, thereby enhancing the general welfare and economic output.

It can be argued that there is now a general consensus that culture is a significant factor in economic and regional development. In this line, Amartya Sen (2009, p. 38) frankly stated that "the real issue, rather, is how—not whether—culture matters". Sen identifies seven points of connection between culture and economic development, four of which need to be conceptually distinguished as they are of particular importance for the development of this thesis:

- *Culture as a constitutive part of development.* Culture can be regarded as an end of development in itself, as one of the dimensions of wellbeing. "Culture has been studied as a necessary element for the full development of people and communities" (Maraña, 2010, p. 4).
- *Economically remunerative cultural activities and objects.* Cultural heritage (be it tangible or intangible) and cultural activities are a clear economic driver, with examples such as tourism of cultural sites, music industry, theatre and movie industry, art ... This stream

connects particularly with the concepts of cultural and creative industries and of cultural capital.

- *Cultural factors influencing economic behaviour.* As seen above, values such as trust, or tolerance have been associated with the level of economic development of a territory. Cultural factors influence the economic behaviour of individuals. This connects with the concept of social capital.
- *Cultural influences on value formation and evolution.* “Not only is it the case that cultural factors figure among the ends and means of development, but they can also have a central role even in the formation of values. This in turn can be influential in the identification of our ends and the recognition of plausible and acceptable instruments to achieve those ends.” (Sen, 2009, p. 42).

The following sections will dig deeper into the cultural factors that influence economic behaviour, i.e. culture as a means for economic development. Concretely, the main methods employed to assess the connection between culture (and values) and economy will be explained, followed by the main social value traits analysed in the literature, and finally, an overview the main findings, theoretical debates and frameworks will be provided.

2.1.8.2. Social values influencing economic development

Measurement methods

Three different methods have been used to measure culture and values and analyse their impact in economic development or in economic behaviour of individuals (Alesina & Giuliano, 2015; R. Fernández, 2011; Roland, 2020):

- Survey and cross-country approach. This is the most widely used approach to measure social values (Alesina & Giuliano, 2015, p. 903), also by the main authors in the discipline, who have developed their own surveys (e.g. Hofstede, Schwartz, Inglehart) (see 2.1.4). Most authors attempting to measure correlations (and/or causality) among social values and economic development have also used quantitative methods via surveys (Alesina & Giuliano, 2015; Apsalone & Šumilo, 2015; Beugelsdijk & Van Schaik, 2005; Knack & Keefer, 1997; Tabellini, 2010).
- Epidemiological approach. This approach, pioneered by Fernández, has the objective to “identify the effect of culture through the variation in economic outcomes of individuals who share the same economic and institutional environment, but whose social beliefs are potentially different.” (R. Fernández, 2011, p. 489). The most common way to use this method has been via the analysis of the behaviour of descendants of immigrants; this method has been used mostly in the USA.
- Laboratory / experimental approach. It consists of a series of participants being invited to engage in a game where their behaviour is analysed in relation to their cultural background in a controlled environment. The major criticism to this approach is the difficulty of generalisation and the creation of too artificial interactions (Roland, 2020, p. 416). Certain values such as trust, or dictator games have been explored (Alesina & Giuliano, 2015, p. 904). The most iconic example of the laboratory approach is the study developed by Henrich, Boyd, Bowles, Camerer, Fehr, Gintis and McElreath (2001) and the small-scale societies.

Key results and ongoing debates

Alesina and Giuliano (2015) after analysing the literature on the economic effect of social values, identify five different cultural traits: general trust, level of individualism, the weight of family in society or family traits, general morality (defined as the level of cooperativism towards society), and the attitude towards work and poverty (whether people believe hard work or luck is more important). Three of these dimensions (trust, family traits, and individualism) also appear among the cultural dimensions that according to Roland's (2020) systematic literature review have an effect on particular economic indicators. In addition, Roland acknowledges three dimensions more: Schwartz's values framework, gender roles and the culture of honour, and relates them to specific economic indicators as summarised in the following [Figure 2.8](#).

Figure 2.8 Economic effects of culture (Roland, 2020)

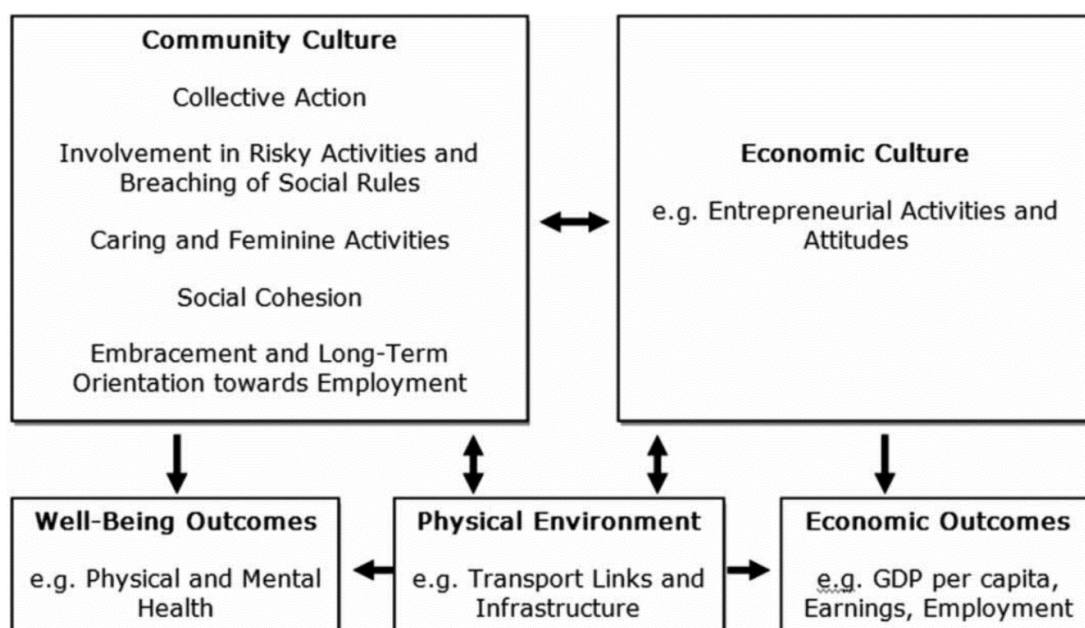
	Trust	Individualism	Schwartz	Gender roles	Strength of family ties	Culture of honor
Income per capita, TFP, growth	Knack and Keefer (1997), Algan and Cahuc (2010)	Gorodnichenko and Roland (2017)				
Exports and investment	Guiso et al. (2004)	Gorodnichenko et al. (2015)				
Financial market development	Guiso et al. (2004), Cole et al. (2013)					
Innovation (RD/GDP)	Hall and Jones (2009)	Gorodnichenko Roland (2017)				
Firm organization (delegation)	Cingano and Pinotti (2012), Bloom et al. (2012)					
Labor market	Algan and Cahuc (2009)					
Democracy		Gorodnichenko Roland (2015)				
Institutions of regulation	Aghion et al. (2010), Aghion et al. (2011), Pinotti (2012)				Alesina et al. (2010)	
Quality of institutions	Tabellini (2008b)	Klasing (2012), Kyriacou (2016)	Licht et al. (2003)			
Accountability	Nannicini et al. (2013)		Licht et al. (2003)			
Redistribution (includes pensions)	Alesina and Angeletos (2005)				Galasso and Profeta (2018)	
<i>(continued)</i>						
LFP of women				Fernandez and Fogli (2009), Fernandez (2007)	Alesina and Giuliano (2007)	
Fertility choices				Fernandez and Fogli (2006), Fernandez and Fogli (2009)	Luke and Munshi (2006)	
Sex ratio				Almond et al. (2019)		
Corruption			Licht et al. (2003)			
Geographical mobility						
Violence						Grosjean (2014)
Efficiency of coordination						Brooks et al. (2015)

Source: Adapted from Roland (2020)

In an study by Apsalone and Šumilo (2015) aiming at understanding the impact of social values and culture on international competitiveness, they highlight several cultural dimensions related with time. Their research analyses 400 socio-cultural and competitiveness indicators in 37 countries and identifies five socio-cultural dimensions that explain 83% of the variance of the Global Competitiveness Index. In addition to the cultural traits or dimensions mentioned by both Roland (2020) and Alesina & Guiliano (2015), such as trust, collectivism, and social structure, two additional cultural time-related dimensions they acknowledge are: *future, cooperation, and performance orientation*, which “describes the preference of future aims, tendency to reduce uncertainty, trust in social institutions and importance of teamwork. Low values in this factor indicate priority of daily issues over future objectives and planning, as well as a low cooperation level in the society” (2015, p. 284); and, *monochronism and rationality*, when a society tends to prioritise one task at a time rather than multitasking.

Huggings and Thompson (2015) go a step further and develop a theoretical framework that explains the links between culture and wellbeing and economic outcomes in place-based or regional development. In their framework, they distinguish between community culture and economic culture, being the latter linked with entrepreneurial attitudes and activities. Community culture (also referred to as socio-spatial culture) encompasses five different elements: collective action, involvement in risky activities and breaching of social rules, caring and feminine activities, social cohesion and embracement and long-term orientation towards employment. Economic culture affects economic outcomes, and cover activities and attitudes linked with entrepreneurship.

Figure 2.9 Culture and place-based development (Huggings & Thompson, 2015)



Source: Huggings & Thompson, 2015, p. 136

Although there is not complete alignment between the specific cultural dimensions identified by the authors, there is a high degree of coherence with the social values that have an economic impact. On the nature of the relationship of both factors, there is considerable debate in the literature. Some authors argue that culture or social values have a causal effect on economic development (Guiso et al., 2006; Tabellini, 2010). Whereas others argue that a correlation has been demonstrated, but it is difficult to estimate a causal effect due to its endogenous character (Jenkin, 2016; Sen, 2009).

At this point it is important to remember three characteristics of social values in order not to fall into cultural determinism and/or cultural generalisations: values influence behaviour, but they are not the only factor; culture is not an homogenous attribute and it does not sit still, it changes (Sen, 2009). For this reason, different value configurations should not be compared to conclude one specific culture is “better” than others for fostering economic development, as diverse cultures can be differently configured (Huggins & Thompson, 2015, p. 132). It is a matter of grasping the specific characteristics of the local or regional context in order to design the development model in a manner that aligns with the existing value configuration, while maintaining an open-minded approach to external values (Huggins y Thompson, 2015, p. 150).

2.1.9. In short

The concept of “value” or “values” is highly ambiguous and polysemic, having been addressed by various disciplines from distinct perspectives. Values are characterised as ideal projections that define what is preferable; they are beliefs that are learned and serve as guiding principles for human conduct. They exhibit a socio-cultural and dual character, can be ranked hierarchically, and are both trans-situational and variable. This variability is evident in longitudinal studies and generational analyses, which are particularly important when examining values. The literature recognises multiple methods for measuring social values; however, quantitative approaches have predominated. Four primary value frameworks stand out: the Rokeach Value Survey, Hofstede's Cultural Dimensions Theory, the Theory of Personal Basic Values by Schwartz, and Inglehart's work on evolutionary modernisation theory through the WVS and EVS.

Social values connect to wellbeing primarily through two pathways: subjective well-being (SWB) and the configuration of welfare states. Cultural relativity implies that individuals hold different values and, consequently, assess societal success or failure based on how well their values are realised. SWB reflects the extent to which individuals perceive their values as fulfilled. Three main theories explain how value priorities influence SWB:

- First, congruity theory posits that higher SWB is reported when values align with the environment in which an individual interacts.
- Second, direct relations theory suggests that endorsing certain values inherently supports higher well-being, identifying so-called “healthy” and “unhealthy” values.
- Third, the theory of value priorities as moderators of SWB argues that people derive satisfaction from engaging in activities that align with their values.

Although the literature on this topic is extensive, questions such as the causality between values and wellbeing remain unresolved. The concept of welfare culture reflects beliefs, values and ideas in a society regarding the welfare state. Four “social Europes” can be distinguished: Scandinavian model, continental model, Anglo-saxon model and southern European model. Welfare models play out not only at national level, but also at regional and local level, and vary over time.

Social values and economic development have several points of connection. Culture can be understood as an end of development, culture influences development, culture has economic value and culture influences economic behaviour. Competitiveness literature has increasingly recognised the role that social values (such as social capital, trust, tolerance) and psychological aspects have in economic development. A number of cultural dimensions have been identified to have economic effect, including, among others, trust and social relations, relationship with time, gender and family roles, relationship with risk, and the level of individualism or collectivism in a society. Some authors argue that culture or social values have a causal effect on economic development (Guiso et al., 2006; Tabellini, 2010). Whereas others argue that a correlation has been demonstrated, but it is difficult to estimate a causal effect due to its endogenous character (Jenkin, 2016; Sen, 2009). The main method to measure the relationship has been via surveys. Lastly, there is no culture better than other for economic development, but rather adaptation to local value-configurations is essential to develop an own economic model.

2.2. Futures domain

The second key strand of literature central to this dissertation is futures domain. Since the aim is to understand the effect of values on shared vision processes, and visions are one of the main tools within the futures field, it is essential to delve into what is meant by the futures domain and how the field has evolved. As a relatively lesser known yet increasingly prominent discipline, it is worth exploring its foundations and development to appropriately contextualise the concept of a shared vision.

Futures domain has gained popularity in recent times. Several of the multilateral institutions have put futures on the spotlight, including the OECD, the UN and the Summit of the Future, or the EU with its yearly Strategic Foresight Report. Moreover, its increasing usage is also being reflected in the growing frequency in publications, such as Harvard Business Review (Scoblic, 2020). However, it is not a new field. There is a lengthy history of contemplation regarding its philosophical and epistemological validity in knowledge construction, as well as the methods and methodologies it employs. The main knowledge pillars, iconic authors and majoritarian paradigms and methods of the field are presented below.

2.2.1. Terminological undefinition

The study of the future encompasses a plethora of approaches and methods, leading to a great fragmentation of the field, both historically and nowadays (Fergnani, 2019; Kuosa, 2011). This fragmentation is also reflected in the terminology employed.

The research field about future is known by several names such as “futures research”, “futures studies”, “prospective”, “foresight”, “futuring”, “futurism” or “futuresology”, among many others. The selection of the most suitable terminology is a topic of ongoing discussion (W. Bell, 2009; E. B. Masini, 2010; Sardar, 2010). “Futurism” relates to the art movement in the 1900s, therefore, futurists are hesitant to use it in scientific contexts. “Futuresology” is outdated and has negative connotations associated with purely prediction oriented work and in many occasions superficial work (Voros, 2022). Futures research term was coined by Roy Amara, however, it is preferably used for emphasising the “research” component and does not refer to the entire field (R. Amara, 1984). Future studies term is very often used generically; however, certain authors, such as, Kuosa (2012) employ it merely for the imaginative and creative part, as opposed to the analytical, logical, and deductive nature of foresight. For this reason, in this dissertation I will opt for umbrella or macro terms such as “futures field” (R. Amara, 1974) or “futures domain” (Kuosu, 2012, p. 17), or simply, “futures”, that encompass all of the above.

It is important to acknowledge that the consideration of Futures as a “field” is also subject of debate in academia. Some authors argue that Futures cannot be considered a field due to its high fragmentation and the lack of a common background of studies among its practitioners (i.e. physics, ethics, sociology, mathematics ...). According to Bell (2009), these two reasons alone are insufficient to deny the categorisation of field, as fragmentation can also be found in other consolidated disciplines (e.g., history), and the lack of common background can be overcome by an establishment of common knowledge bases (in ethical, and methodological fronts). Bell,

whose argument I agree with, declares Futures is a multifold or a transdisciplinary field (Bell, 2009, p. 71).

Lastly, the plural form is used in reference to the term “future” is not accidental, but a fundamental principle of the field in its modern times. It rejects the notion of a single, predictable future and instead acknowledges the existence of multiple alternative futures, a paradigm shift that will be explained deeper in the next section of the historical evolution of the field.

2.2.2. Historical delimitation of the field

Before defining the key concepts and explaining the main frameworks or the discipline, and to aid the understanding of its development, I will briefly examine the history and origins of the futures domain. For this purpose, I will follow Kuosa (2011), who identifies two distinct paradigms in the futures domain history, with the turning point being the Second World War.

From the first paradigm’s viewpoint, the future of the world was predetermined and “readable” in advance with appropriate tools (e.g. rituals) (Kuosu, 2011). In that era, only one single future seemed to be possible (Cuhls, 2003). This approach and the interest about the future can be traced far back in history, even in prehistoric times (Gidley, 2020; E. Masini, 1982; Smart et al., n.d.). I will not delve into this extensively as it is not the focus of this dissertation. Therefore, the key concept to consider of this era is the existence of an underlying paradigm of one, single, predetermined future.

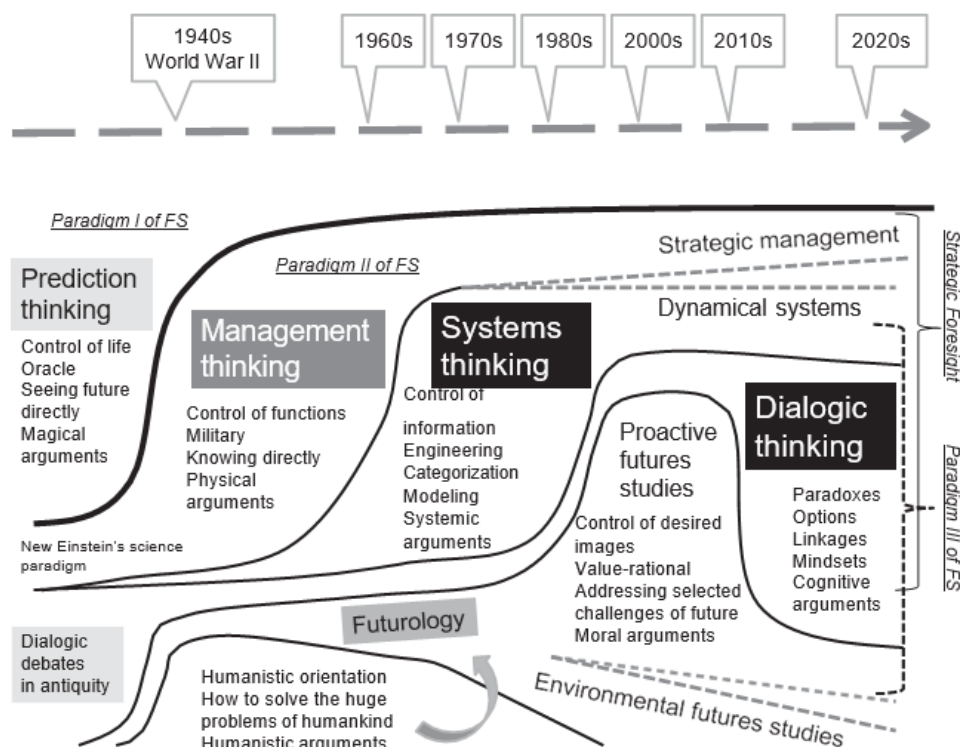
From the 1940s onwards, the imprint of the Second World War led to two conclusions: the recognition of the significance of planning and strategy; and the acknowledgement of the consequences of human action (likely to last for generations). The war had a profound impact on the ideological foundations of the futures field, leading to a complete paradigm shift (Amini et al., 2021) and the genesis of modern futures domain. “The future” was no longer something to predict, but there are multiple alternative futures that can be forecasted, and preferable futures can be constructed (Alayon, 2022; R. Amara, 1981; Bishop, 2022; Inayatullah, 2012; Kuosa, 2011; E. Masini, 1982). The second paradigm is summarised as “the future is many, not one” (Bishop, 2022).

Within modern futures field Masini identifies three main orientations: technologically oriented, sociologically oriented, and globally oriented (E. Masini, 2006, p. 1161). They reflect a profound evolution of the field also in the methodological part, from a positivistic standpoint to its openness to more pluralistic approaches (Amini et al., 2021). Kuosa (2011) identifies three distinctive phases within modern futures field. A summary of the evolution is shown in the figure below (see [Figure 2.10](#)):

- **1940s to 1950s:** the original initiators were USA research units and think tanks, especially in the military forces. The most paradigmatic booster was the RAND project (Research And Development- a project by the US Army Air corps and Douglas Aircraft Company) (Kuosu, 2012, p. 6). During this phase the approach adopted was purely positivistic, being trend extrapolation and technological foresight at their peak.

- **1960s to 1970s:** the second phase is when the futures studies movement spread internationally beyond USA military. The focus was on trying to address “great problems of all humankind”, such as war, poverty, oppression, enhancing democracy, conservation of nature... (Kuosa, 2011, p. 331). Great efforts were made into developing further the methodological part of foresight. Key actors include the Club of Rome and the International Futuribles Association of France, Mankind 2000 and the World Futures Studies Federation (Masini, 2006). Several social movements also emerged in this period (e.g. tomorrow/2000/goals movements), despite they were not identifying themselves as futures movements, they planted the seeds for the participatory stream within the futures domain (R. Amara, 1974, p. 291).
- **1980s to present time:** the third phase comes with a stabilisation of the field, along with its fragmentation. The focus shifted from the development of the methods towards a higher reflection about the discipline itself: What name(s) should be used for the discipline? What’s the role of future researchers? And how should it be discussed with the public? (Kuosa, 2011, p. 332).

Figure 2.10 Evolution of the futures domain (Kuosa, 2012)



Source: Kuosa, 2012, p. 17

2.2.3. Epistemological approaches

As already introduced in the historical section, there are and have been various paradigms or philosophical approaches towards what “the future” is and in relation to whether we can have knowledge about it. Interestingly, the epistemological approach is one of the areas that is underdeveloped in the futures domain, in contrast to the extensive work on the methodological and methods side (W. Bell, 2009, p. 78). The paradigm shift from understanding there is only one future to predict towards multiple alternative futures approach is a shift from a positivist epistemology to more pluralistic approaches (Amini et al., 2021; Gidley, 2017, 2021).

Inayatullah (1990) distinguished three major epistemologies in the futures domain: predictive-empirical, cultural-interpretive, and critical-poststructuralist.

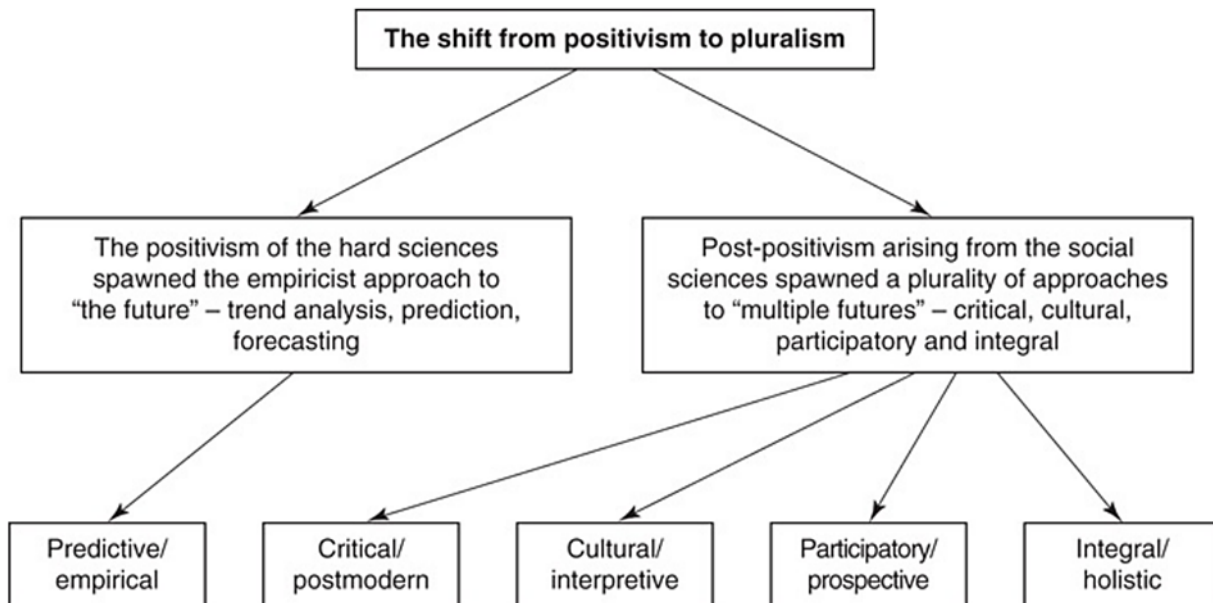
- **Predictive-empirical:** This approach has a positivistic standpoint. At the heart of this approach is the belief that the world, and, therefore, the future, is real and it is discernible. The role of futurists is to capture or explain it via hypothesis, variables, and causal relations. The positivist tradition includes “the logical structure of relational statements, the language of mathematics, causality, empiricism and testability, objectivity, rationality, transcultural applicability, (...) and verified knowledge” (W. Bell, 2009, p. 235). This approach is usually perceived as “value-neutral (or impartial)” and objective, and in the futures domain it is mostly manifested in the method of trend analysis (Gidley, 2021, p. 139).
- **Cultural-interpretive:** This approach emerges in the 1980s with the postcolonial discourse (Gidley, 2021, p. 141). From this view, similarly to the predictive-empirical approach the real world (and the future) exists. However, it is essential to be aware of the existing cultural biases, re-think the “universal” truths (Inayatullah, 1990).
- **Critical-poststructuralist:** This approach questions the business as usual or the status quo of economic, social, and cultural research (Gidley, 2021, pp. 139–140). Understands reality as socially constructed. “Instead of prediction or a discovery of either truths or Truth, what results is a project committed to the creation and design of tomorrow: a project committed to the social construction of time, space and consciousness” (Inayatullah, 1990, p. 136).

Building on Inayatullah’s work, Gidley (2017, 2021) includes two additional epistemologies that co-exist in the futures domain, resulting in the five evolving futures approaches (see [Figure 2.11](#)):

- **Participatory-prospective:** This approach advocates for the co-construction of the future together with participants, as a means to empower them. It “integrates the activism of the French prospective with vision-building and action research methods” (Gidley, 2021, p. 143). Specific examples of this approach include: action foresight (by Jose Ramos), engaged foresight (by Shermon Cruz) and forward theatre (by Alethia Berenice Montero Baena) (Gidley, 2021, p. 144).
- **Holistic-integral:** This approach originates from the integrative forecasting (by Erich Jantsch) who “incorporated social, economic, political, technological, psychological, and

anthropological dimensions in policy-formation, planning, and decision-making” (Gidley, 2021, p. 144). Some examples include methods such as immersive experiences or multi-media approaches.

Figure 2.11 Typology of five evolving futures approaches (Gidley, 2017)



Source: *Gidley, 2017, p. 95*

Not all authors can be easily categorised into one of the aforementioned epistemologies. Bell (W. Bell, 2009) for instance, argues for “critical realism”, which is a middle ground category between positivism and postmodernism/structuralism epistemologies. More recently, Gong (2024) argues in favour of the suitability of this approach for the intersection between futures domain and economic geography. Critical realism’s view on reality can be summarised as follows:

The future is real, although not manifested yet, it consists of multiple possibilities and actualises through transformative events; therefore, the future can be influenced (at least to some extent) by participating actors (Patomäki, 2006), but it will not be fully decided by human actions alone, as there are still structural factors that are interacting with human agency.

(Gong, 2024, p. 8)

A commonly accepted ontological premise in the futures field is that there are no facts about the future, since it cannot be observed nor measured (W. Bell, 2009; Gong, 2024; Wilkinson, 2017). “There are past facts, present options, and present possibilities for the future” (W. Bell, 2009). Although there are no facts about the future, “it can be experienced through imaginative storytelling, immersive learning and using collaborative approaches to group model building

and whole systems thinking.” (Wilkinson, 2017, p. 3). “The future does not exist, but images of the future exist” (Fergnani & Chermack, 2021, p. 4).

According to Wilkinson (2017), the images of the future can be obtained by iterating between different ways of knowing the future (creative, critical, analytical), bearing in mind that the knowledge about the future is always temporary. Dator (2017, p. 15) is also epistemologically open, and understands that his task as a futures researcher is to collect as many images of the future as possible (regardless of their approximation). What results crucial is, that regardless of the method used, to profoundly understand and explicitly state the assumptions made in its application (Ramírez & Wilkinson, 2016, p. 65). This pluralistic approach and critical realism is where I position myself as author of this dissertation, acknowledging that no approach can be considered neutral, as they all stem from specific assumptions or values.

2.2.4. Categories of futures

Three Ps by Roy Amara and the Futures Cone

One of the most influential authors in the futures domain has been Roy Amara. He developed three categories of futures based on three basic premises of the field, making the non-predeterministic paradigm tangible and simple to explain. Under the premise that the future is not predetermined, there can be multiple **possible futures**. Additionally, the future is not predictable but there are (more or less) **probable futures**. Lastly, future outcomes can be influenced by our choices in the present, and thus, **preferable futures** can be imagined and constructed (R. Amara, 1974, 1981, 1984, 1988; R. C. Amara & Salancik, 1972). They have also been referred to as the 3Ps of futures field (e.g. (W. Bell, 2003).

Table 2.5 Three categories of futures by Roy Amara (1972, 1974, 1981)

Premises	Categories and features		
The future is not predetermined.	Possible futures	The art of futurism. “Visionary”	“Can”
The future is not predictable.	Probable futures	The science of futurism. “Analytical”	“Will”
Future outcomes can be influenced by our choices in the present.	Preferable futures	The politics and psychology of futurism. “Participatory”	“Should”

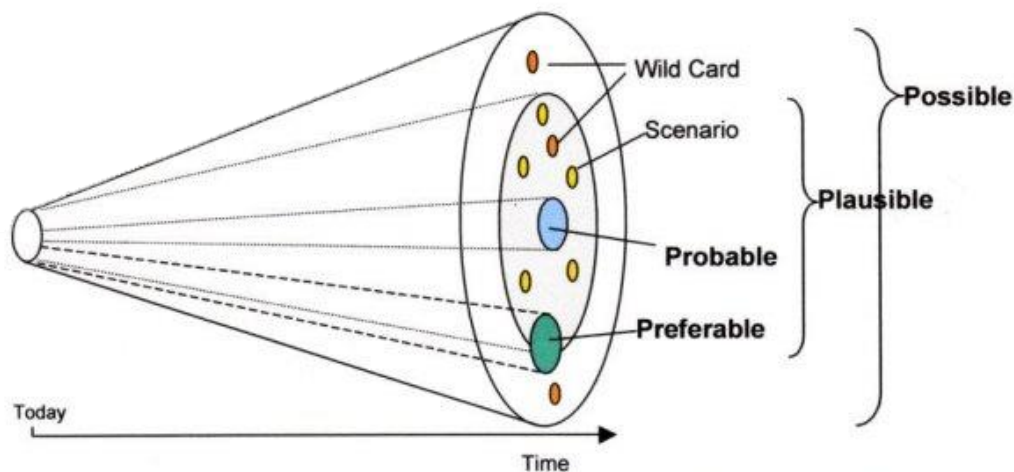
Source: Own elaboration based on Amara's work

Henchey (1978) adds a fourth “P” to the futures framework: **plausible futures**. This category includes the futures that “could happen” based on our current knowledge and understanding

of the system (physical laws, processes, causation, human interaction...) (Voros, 2022). Plausible futures are less than possible futures but encompass wider alternatives than probable futures.

One of the ways to visualise all these concepts and their interrelations is the *Futures Cone*. The cone reflects the increase in possibilities as time progresses from the present, and how plausible, probable, and preferable futures are projected into that range of possibilities. In view of this, it has also been referred to as the Cone of Possibilities or the Cone of Plausibilities (Gall et al., 2022, p. 4). While its limitations must be recognised, the metaphor of the cone emerges as one of the tools that conveys the concepts in a more communicative way (Candy, 2010, p. 38). It was first introduced by Taylor (1993) in a horizontal form (as the Plausibilities cone) and by Hancock & Bezold (1994) in its most commonly known horizontal form. Since then, it has been further developed by several authors (Candy, 2010; Hines & Bishop, 2015; Voros, 2003, 2022). Gall et al. (2022, pp. 6–8), provide a wide overview of the authors that have developed it with sketches of how the cone is visualised by each author.

Figure 2.12 The Futures Cone



Source: Voros (2022) adapted from Hancock & Bezold (1994)

Levels of depth in the futures domain by Richard Slaughter

As mentioned above, the futures domain is highly fragmented and includes very different approaches. They also vary in the level of depth with which they tackle the future, as Slaughter rightfully pointed out. He identified three levels:

- **Pop futurism.** Refers to the approach that is media friendly, and popular ways of future studies (art, film industry, book industry...). For instance, within this level of depth the art style of retrofuturism could fit in, which consists in looking back at how future used to be imagined in the past (Smart et al., n.d.).

- **Problem-oriented futures work.** It is the most used way to approach futures studies, with the objective of responding to major challenges that organisations and communities face in the near future.
- **Critical and epistemological future studies.** It is the most profound layer of futures studies. “Critical work attempts to ‘probe beneath the surface’ of social life and to discern some of the deeper processes of meaning-making, paradigm formation and the active influence of obscured worldview commitments” (Slaughter, 2002, p. 495). For that purpose, the inclusion of new voices in the conversation, including minorities, women, children and non-Western citizens becomes essential (Fitzgerald & Davies, 2022; E. Masini, 2006; Slaughter, 2002).

Far from discrediting any of the levels, Slaughter advocates towards a futures work that incorporates aspects of all three levels of depth, adopting the accessibility form pop futurism, the problem and need-orientation from the second level, and the innovative character and deeper understanding from the critical and epistemological level (Slaughter, 2002, p. 506).

2.2.5. Complementarity between the futures and planning approaches

Both futures field and (strategic) planning are forward-looking disciplines, that encompass a broad array of approaches, tools, and frameworks. Then, what are the key differences between both approaches? The answer will vary depending on whether it is posed to planners or futurists. Even within futures researchers and practitioners the positionality of how both disciplines are related differs.

According to Inayatullah (2012), planning aims to exert control over the future, while futures domains aims to explore alternative futures, moving away from the notion of a single future. The validity of the conventional approach to planning is questioned by the author as, unlike futures studies, planning fails to address the underlying power structures and values present in the system (Inayatullah, 2012, pp. 44–45).

Voros (2022) understands that futures work “enriches” strategic planning, and both disciplines are therefore, complementary. The author argues that foresight is part of the strategic thinking process (as defined by Mintzberg, 1994) that feeds the strategy development process, which results in a plan that is implemented, monitored, and reported on. This perspective of complementarity appears more conciliatory and useful for capitalising on the learning from both approaches. There is certain consensus that futures field can complement conventional planning, in four key aspects:

- **Provide a longer-term view** (Conway, 2015; EC, 2001; Inayatullah, 2012). Although strategic planning exercises typically cover a period of 3-5 years, futures approach adopts a longer-term perspective, with no limit of time.
- **Allow wider scope for participation** (Conway, 2015; EC, 2001; Inayatullah, 2012). Futures domain aims to include a variety of interest groups, rather than solely focusing on those in positions of power that traditionally develop the strategic plan. However, planning is also turning towards multi-stakeholder and co-creation approaches.

- **Include wider diversity of sources of knowledge** (Conway, 2015; Inayatullah, 2012). Whereas planning focuses mainly on linear extrapolation of the past and rely mostly on quantitative data, futures domain engages wider sources of knowledge including more creative approaches such as images of the future or serious games.
- **Challenge assumptions and power structures** (Conway, 2015; Inayatullah, 2012). Futures approach offers opportunities to envision alternatives beyond the mainstream power structures and surface profound values, beliefs, and worldviews.

Matti & Bontoux (2024, p. 19) conclude the following: *“Strategic foresight offers a rich toolbox to make sense of complexity, understand the systemic nature of issues, explore alternative ways forward in order to weigh the pros and cons, and translate the selected pathways into coordinated policy actions”*.

2.2.6. Foresight in the futures domain

Foresight

The official definition of foresight for the European Union was developed in the FOREN project and states the following: “foresight is a systematic, participatory, future intelligence gathering and medium-to-long-term vision-building process aimed at present-day decisions and mobilising joint actions” (EC, 2001, p. 3). It is, therefore, essentially collaborative and action oriented. The definition includes both explorative approaches (via future intelligence gathering) and normative approaches (via building a preferable future or vision) of foresight (Tonurist & Hanson, 2020).

Foresight differs from forecasting as it does not present one fixed image, i.e. foresight is not deterministic nor static. Instead, foresight assesses various potential possible futures and aims to navigate towards the most desirable outcome (Gaub, 2019).

Conway considers foresight is also an individual or organisational capability, and defines it as an “unconscious capacity and needs to be surfaced to be used in any meaningful way to inform decision making, either as individuals or in organisations” (Conway, 2015, p. 2). During foresight processes a unique language to see the world is learned enabling participants to comprehend, interpret, and shape preferable futures via new lenses (Rhisiart et al., 2015). “Foresight is to the future what memory is to the past: an organising yet selective principle creating order in complexity” (Gaub, 2019, p. 5).

This definition is the result of an evolution in the field of foresight over the time. Popper *et al* (2010) show this transformation very clearly by distinguishing five different generations of foresight: the first generation, had a focus on technology forecasting developed mainly by experts; the second generation, matched technology with markets, bringing together science and business; the third generation, included a social dimension and there was a focus on foresight methodologies; the fourth generation, moved away from an integrated programme towards a distributed role in the innovation system; and finally the fifth generation, with a structural and broad policy focus (Popper et al., 2010). Foresight has evolved from being a means of developing S&T resource allocation to a tool for consultation, networking, and the development of shared visions (Hanssen et al., 2009).

Regional and strategic foresight

Foresight is multidisciplinary or transdisciplinary tool, highly versatile and multifaceted, that can and has been used in many different contexts. Foresight is frequently employed in organisational settings (corporate foresight), and it can be used in different territorial scales. The same FOREN project used to generically define foresight, defines **regional foresight** as “the implementation of anticipation, participation, networking, vision and action at a reduced territorial scale, where proximity factors become determinant” (EC, 2001, p. 3). Other terms, such as territorial foresight, have also been employed to refer to its use in urban and regional settings (Fernández Güell, 2012). This approach is particularly suitable for incorporating participatory elements and generating foresight ecosystems with local/regional stakeholders. It provides an opportunity for unusual actors (to the participatory processes) to be part of the future-building process (Hanssen et al., 2009).

Regardless of the sphere or level where it is applied, **strategic foresight** is one of the most characteristic approaches. According to Kuosa, “strategic foresight is about producing foreknowledge and strategic options for someone who wants to win a political, military or business battle” (Kuosu, 2012, p. 54). Wilkinson, however, defines it in a more lenient manner: “strategic foresight offers a way of making use of our inherent storytelling abilities in order to engage tacit knowledge, make assumptions explicit, forge new shared understanding (i.e. meaning making), and anticipate and prepare for what has yet to happen” (Wilkinson, 2017). Both authors highlight the feature of anticipation or preparedness as essential, in order to overcome, in a clever manner, the adversity or the adversary. Padbury (2020) summarises in [Table 2.6](#) the most prominent ways of practicing foresight, and connects them with the implicit assumptions behind them and the main methods they employ.

Table 2.6 Characteristics of forecasting, strategic and applied foresight

APPROACH	TOOLS	IMPLICIT ASSUMPTIONS	PRODUCT
Forecasting	• Scanning for trends • Data analysis • Trend extrapolation • Trend impact assessment	The future is an extension of the present. Surprises come from changes in the value of the known variables	An understanding of the expected future
Strategic Foresight	• Scanning for weak signals of change • Driver analysis • Influence maps • Cross impact analysis • System analysis • Scenarios • Assumption testing	The underlying system is evolving. Surprises come from changes that disrupt the system	An understanding of the range of plausible futures and the potential surprises that current policies and institutions are not ready to address
Applied Foresight	• Builds on strategic foresight • Stakeholder analysis • Design thinking • Strategy and vision building	By understanding how the system could evolve and the surprises that could emerge, we can develop more robust policies, strategies and visions	Policies, strategies and visions that are robust across the range of plausible futures

Source: Padbury (2020, p. 250)

2.2.7. Futures methods

The methods or tools employed to study the future have been one of the most developed aspects of the discipline (W. Bell, 2009, p. 78). Since the future does not exist *per se*, a great effort has been made in identifying alternatives means through which to create images or ideas of the future. The range of tools and methods in the futures domain is such that the United Nations (in Asia and the Pacific) has developed a Playbook (UNDP RBAP, 2022) to guide potential practitioners in their use.

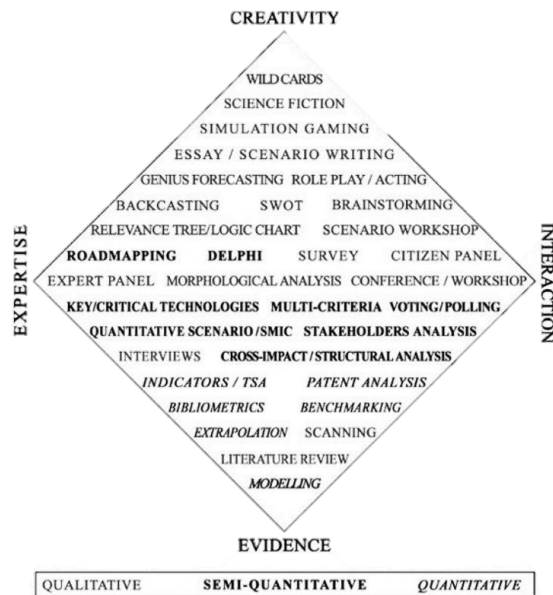
2.2.7.1. Overview of methods

In the origins of the modern futures studies, the discipline identified itself with tools aiming at forecasting the future, such as, Delphi method, cross-impact modelling, ... (R. Amara, 1991). Since then, a significant part of the effort has been focused on identifying new problem-oriented tools and improving the efficacy of the existing ones (R. Amara, 1991), including more participatory and qualitative approaches.

Today, the range of available tools is so extensive that there are multiple methods for the same stage in the futures process. Some of the methods have been adopted from other disciplines and tailored to the futures domain (Puglisi, 2001), including economics, psychology, sociology, cultural and anthropological research. Therefore, one of the roles of the futures researcher is to choose and mix well the tools to be used in the futures process (Koschatzky, 2005), and to be up to date, as new digital formats are emerging (particularly AI and immersive technologies).

Methods can be classified by different criteria, such as their quantitative or qualitative nature, whether they are explorative or normative, hard and soft methods, the level of expertise required or the level of interaction (Puglisi, 2001). Popper (2008) developed the “foresight diamond”, which organises all foresight methods in a visual manner, placing them according to two axes: the level of expertise or interaction needed, and the level of evidence or creativity required (see [Figure 2.13](#)).

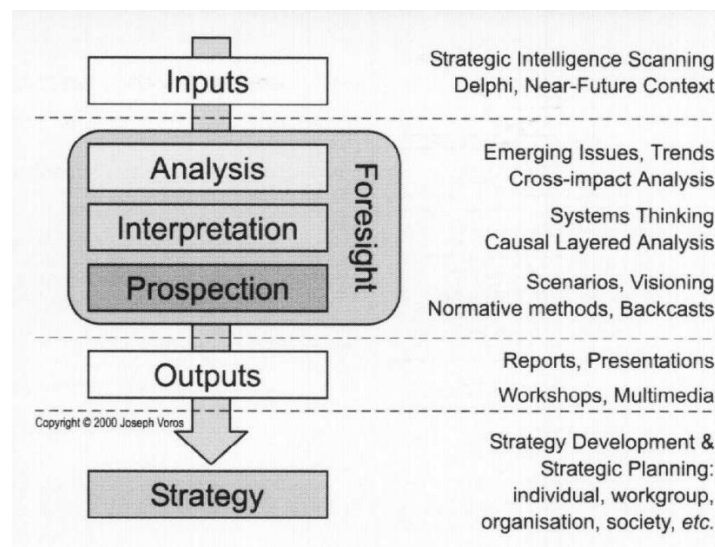
Figure 2.13 Foresight Diamond (Popper, 2008)



Source: Popper, 2008

The classification of methods used by other authors varies depending on the phase of foresight or futures studies to which they contribute. Voros (2003) crafted the different phases of a “**generic foresight process**”. A linear succession of inputs, the foresight process (formed by analysis, interpretation, and prospection), a resulting output that ends up feeding a strategy. Voros presents the foresight process and its associated tools (Voros, 2003, 2022).

Figure 2.14 Foresight framework, with representative methods (Voros, 2003)

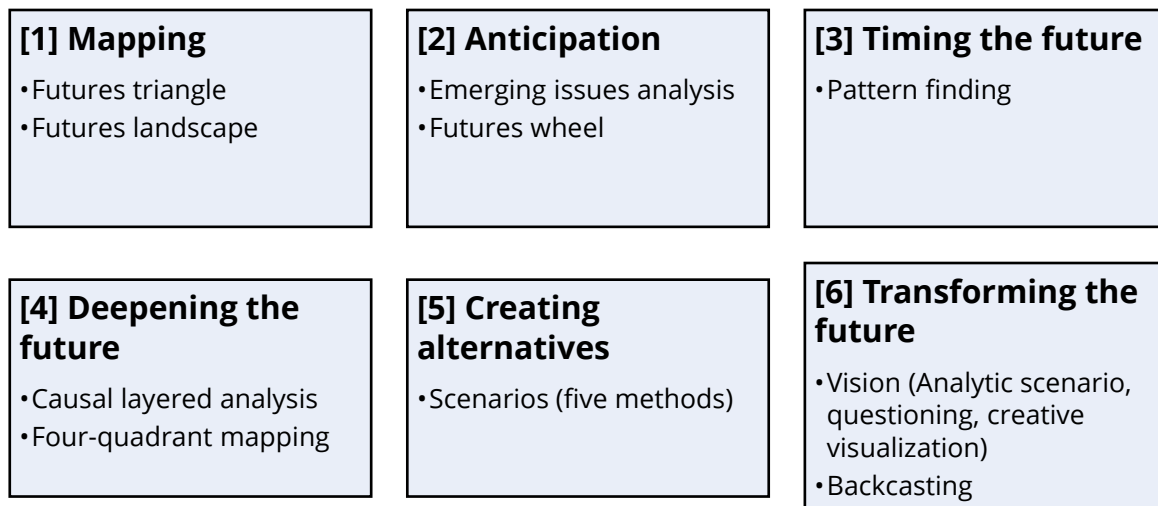


Source: Voros, 2003

In a similar vein, Inayatullah identified “**six pillars of a futures studies**” (2008). The pillars are, consequently, mapping, anticipation, timing the future, deepening the future, creating alternatives, and transforming the future. Diverse tools can be associated with each of the pillars of futures studies (see [Figure 2.15](#)). Among all the methods mentioned, the work of the author is particularly significant for this dissertation as the developer of the *Causal Layered Analysis* (henceforth, “CLA”) due to its connection with the topic of values and values system. This tool allows the user to unpack the different layers of reasoning behind a challenge of the future. The first layer is litany, or the “day-to-day future, commonly accepted headlines” (Inayatullah, 2008, p. 12); the second layer are systemic causes, or social, economic and political causes of the issue. The third deeper layer is worldview, related to the cultural paradigm that informs our lenses to see the issue. The fourth and last layer is the myth or metaphor, the mental story created unconsciously.

Wilber and Slaughter developed an additional tool to dig even deeper based on CLA named the *Fourth Quadrant Mapping* (Inayatullah, 2008). Two axes are identified: inner- outer, referring to internal thinking and behaviour, and self- collective. They form four quadrants, baptised by Voros (2001) as: intentional (inner-self), cultural (inner-collective), behavioural (outer-self) and social (outer-collective). The tool is particularly useful to consider additional areas where policy can act to change individual and collective behaviour.

Figure 2.15 Six pillars of futures studies, with representative methods (Inayatullah, 2008)



Source: Own elaboration based on (Inayatullah, 2008)

Another tool that was developed initially by Sohail Inayatullah is the *Futures Triangle*. The triangle reflects that “identifying alternative futures is a fluid dance of structure (the weights of history) and action (the ability to influence the world and create desired futures)” (Inayatullah, 2012, p. 39). Plausible futures are a mixture of (1) the weight of history, (2) the push of the present and (3) the pull of the future¹¹. It is these three aspects that comprise the three points of the triangle.

As the thesis does not aim to list every tool and delve into them in detail, only the most impactful and relevant tools in the discipline will be mentioned to provide a general overview, as some have been employed in the case study:

- *Trend or megatrend analysis*. Despite it might seem contradictory with the dominant paradigm that the future is not determined, this forecasting technique remains as a highly used method (Puglisi, 2001). Megatrends are “global, long-term change developments that have impacts on business, economy, and culture on both societal and individual levels” and trend are “recognisable developmental path that can be, at least in theory, verified with quantitative data” (Kuosa & Stucki, 2021, p. 10).
- *Delphi*. This qualitative method, named after the ancient Delphic Oracle, involves structured indirect interaction among experts to gather and organise their opinions systematically (Puglisi, 2001).
- *Scenario planning*. They are “descriptions of the alternative future development paths. They are either plots in the form of narratives or quantitative forecasts in the form of curves. They are not predictions of the future, but they help one explore what could happen and how to prepare for various contingencies” (Kuosa & Stucki, 2021, p. 11). There are very different types of scenarios, including, the multi-single variable or the double variable method, and also best-case, worst-case scenario techniques (Inayatullah, 2008).
- *Wild cards*. They are “an event or development with small probability but with a high impact if it occurs. Wild card analysis means identifying these events and developments and assessing their potential implications” (Larsen et al., 2020).
- *Weak signals*. They have been defined as “early information concerning potential discontinuities and emerging issues, such as new technologies which are still in their infant phase, but which may see a breakthrough at some point. (...) Weak signals can grow into trends, fade away or appear as early warnings for wild cards” (Kuosa & Stucki, 2021).

Often, STEEPV framework is employed as an analytical framework, which points out at social, technological, economic, environmental, political and value related phenomena, to identify trends, build scenarios or develop future-oriented strategies (Kuzminov et al., 2017; Saritas & Kuzminov, 2017).

¹¹ Dator (2017) adopts a different terminology for the three forces. From his point of view, the three factor are: the push from the past (culture, beliefs...), the attraction of the future (emerging technologies...) and the friction of the present (constraints, entrenched institutions). Dator (2017, p. 11) understands that all three factors are in constant competition among each other.

Finally, when designing the future building process, it is important to consider not only which method to use, but also with whom to use it. Traditionally, methods that prioritised 'expert' (i.e. disciplinary or theoretical) knowledge, such as Delphi or modelling, were given priority. However, it is now widely recognised that knowledge is dispersed, and that incorporating diverse perspectives can greatly enrich the outcome of the futures process. In the end, the methodological question is directly linked with who is given the power to imagine and create possible and preferable futures that will influence action (Fitzgerald & Davies, 2022).

Along with the ethical question of power, the quality implementation of the methods is of great relevance when assessing the work. Amara (1991) proposes three quality criteria for futures: "plausibility of images (the possible), reproducibility of forecasts (the probable), and explicitness of values and impacts (the preferable)" (Amara, 1991, p. 649).

2.2.7.2. Vision(ing)

Due to its relevance to this dissertation and its link to the case study, I will now provide a detailed explanation of the vision as a tool. Eleonora Barbieri Masini has been one of the most prominent advocates for using visions as a futures field method. She advocated for leaving behind the analysis of the past and present extrapolation merely, to start constructing preferable visions for the future (E. Masini, 2006, p. 1164). In her words, "future studies must become acting for the future" (E. Masini, 2006, p. 1166).

Vision: Conceptualisation and process

The term 'vision' is frequently used and widely recognised. Therefore, there are numerous definitions. To mention just a few, Nanus (1992) defined a vision as an "energising image of a more desirable future". Kuosa (2012, p. 35) opts for "compelling statement of the preferred future that an organisation or community wants to create". For Hines and Bishop (2015, p. 247), a strategic vision is an "image of the future that offers direction, yet is never reached". I agree with Nanus (1992) and Hines and Bishop (2015) as the term "image" of the future resonates more with the practice of visioning, whose result can manifest as a statement as highlighted by Kuosa (very common in the organisational arena), but it can also be abridged as a metaphor, a figure, a story, or other more creative outcomes.

Van der Helm (2009) distinguishes seven versions of visions: humanistic, religious, political (also named ideologies), business (the most commonly used version), community visions (when the vision is built interactively), personal vision and public policy making visions. The last one is a "hybridisation" of political, business, community and humanistic visions.

The extensive use of visions carries inherent risks. As Conway mentions quoting Schulz (1996) "Currently the term is in danger of becoming clichéd, hackneyed, and over-used to meaninglessness: in an age of transition, vision is desperately sought but seems so elusive that the seeking itself is often ridiculed" (Conway, 2015, p. 23). To avoid superficiality, a vision must possess the following characteristics: a vision is a statement about the future, it is normative, and it is action-oriented.

First, **a vision is inherently about the future.** The term of vision can be confused with other concepts that, following van der Helm (2009), we will include under the umbrella “view”, such as worldview or perspective of the world, or even opinion. It is not uncommon to be asked “What is your vision?” when in essence, they are merely seeking your opinion. Despite visions are always constructed around worldviews (Fitzgerald & Davies, 2022), both concepts are not synonyms; a vision must contain a statement or claim about the future (van der Helm, 2009, p. 99).

Second, a vision is normative, or value based. As stated above, all futures processes are based on a set of assumptions and worldviews, and as such, visions are also built around those parameters or value-systems (Fitzgerald & Davies, 2022, p. 10). Ramirez and Wilkinson even use this characteristic to define a vision as “a description of a normative conceptual future” (Ramírez & Wilkinson, 2016, p. 222). Despite certain authors argue that visionary capacity is essential when building scenarios, scenarios have explorative nature whereas a vision has normative nature. Scenarios describe what might happen and a vision describes what should or what one wants to happen.

Visions have also been associated with utopias. In the definition stated above of Hines and Bishop, they highlight as a characteristic that a vision “is never reached” (2015, p. 247). However, there are other authors, such as the Hawaiian futurist Jim Dator, that defend that a vision is not a utopia, it is an eutopia (Dator, 2017). Utopia derives from the greek u (no) and topos (place), whereas eutopia means eu (good, correct), and topos (place) (Anders, n.d.). I take a position on Dator’s approach. Thus, a vision should be inspiring and aspirational, it is an idealised future (van der Helm, 2009, p. 99) but it also needs to be achievable and balanced considering the past, present, and future. It should build on the strengths of the territory and create an anticipatory agenda that is not overly focused on either the past or the future (Iparraguirre, 2023).

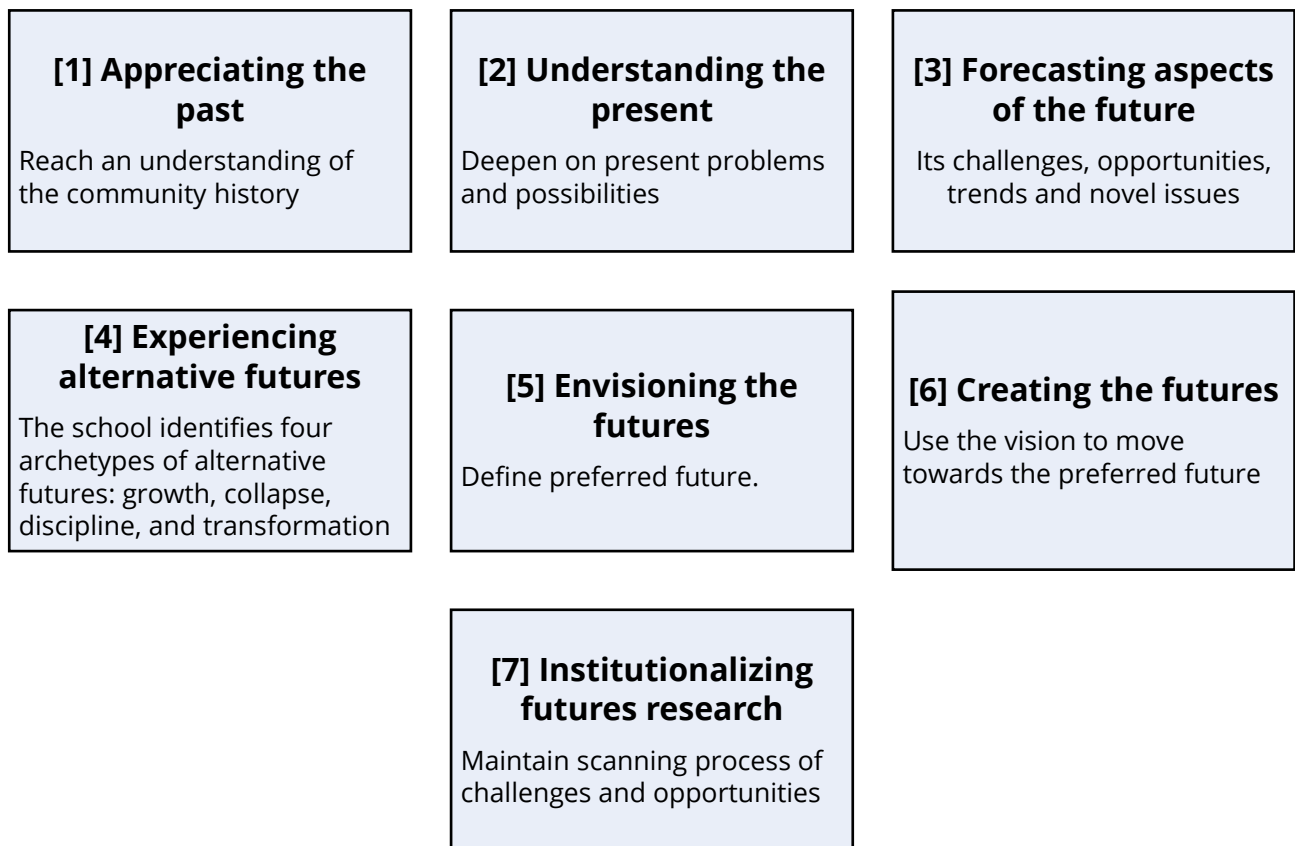
Third, **a vision is action oriented.** Visioning needs to help make decisions to move towards it (Dator, 2019, p. 39). Therefore, a vision plays a crucial role in shaping present actions and navigating the complexities of societal change. It helps orient daily activities (Hines & Bishop, 2015, p. 248) and trigger social change (Stevenson, 2006, p. 668). The more communicative and explicit the vision, the higher its motivational and inspirational power. Thus, visions are often associated with different metaphors, such as a vision as a compass or a magnet for the future, which supports its communication capacity (van der Helm, 2009, p. 101). In this line, Masini (1982, 2006) underscores the importance of futures studies in identifying the “seeds of change” embedded in the past and present, laying the groundwork for a better future.

When translating vision into action, the tool of *backcasting*, pioneered by Elise Boulding (1995), comes into play. It entails envisioning a desirable future and then tracing back the steps necessary to achieve it or to avoid a worst-case scenario, connecting future trends, developments, and policies with the present in a plausible manner (Larsen et al., 2020). Backcasting works in the opposite direction to traditional strategic planning “which relies mainly on forecasting from a known past or present, and from their trend lines” (Stevenson, 2006, p. 669). It is a useful tool to tackle complex problems, as it has a sufficiently timeframe to allow real change (Søgaard Jørgensen, 2013).

In this context, the concept of stretch goals, defined as ambitious targets to motivate beyond comfort levels, as discussed by Hines & Bishop (2015), becomes relevant. These stretch goals align with the visioning process, pushing individuals and institutions to strive for transformative change.

Although vision is a commonly used term and practice, doubts still exist regarding what the best process for its construction (i.e. visioning) is (Sotarauta & Beer, 2021). Rather than an specific process menu, some authors argue for a set of useful tools (C. Francis, 2019, p. 3). One approach that fits the above-mentioned characteristics is the approach by the Manoa School. The visioning process outlined by the school, led by Jim Dator (2019, pp. 37–39), involves several steps or components:

Figure 2.16 Visioning process by the Manoa school (Dator, 2019)



Source: Own elaboration, based on Dator 2019

Shared vision: conceptualisation and process

A shared vision is a vision that is **imagined collaboratively**. Following the seven versions of van der Helm (2009), a shared vision would qualify as a community vision. It is an exercise of deliberation to agree on a common ground or common denominator, on which to construct a

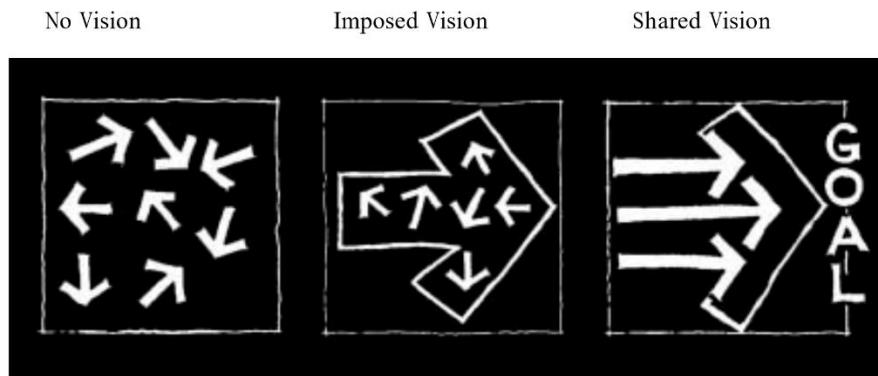
series of transformative change. Two main questions emerge: who's vision or a vision shared among who and, how is this constructed.

Regarding whom, one approach to visioning is that of a visionary leader who has a clear vision of the future and communicates it to their community. However, in futures processes with a territorial or regional nature, no actor can impose their view to others (J. Karlsen & Larrea, 2014). Then, who is legitimised to participate in the visioning exercise? Some adhere to a strictly legalistic viewpoint, limiting legitimacy to only those politically elected as representatives (and no other citizens), as noted by Stevenson (2006, p. 671). Conversely, Dator (2017, p. 40) posits that legitimacy extends to all individuals impacted by the outcomes. Indeed, stakeholder participation is a way to ensure policymaking responds to people's needs in addition to strengthening democracy (Campbell, 2023). Larrea (2021) emphasises the importance of representing diverse interests rather than merely maximising participation numbers in order to construct a shared vision (and identify divergent visions). In addition, Uranga (2007) reinforces that the future is not constructed by individual actors, but rather by "social actors". The important is to be able to construct a collective "us" where the participants feel involved and represented (Uranga, 2007, p. 20).

Regarding how shared visions are constructed, quality conversations between different actors need to be facilitated, and safe spaces created in order to listen to each other, disagree if needed, negotiate interests and learn by doing (Dixon et al., 2022; Wilkinson, 2017). Basic assumptions need to be revisited and willingness, intelligence, capabilities (including creativity) and resources put at the service of the process (C. Francis, 2019; Uranga, 2007). Many learnings can be obtained from other academic disciplines, such as deliberative democracy, or participatory public policy, regarding the procedural aspects of a shared vision (Pernaa, 2017). In a shared visioning exercise, the personal and/or institutional visions of the participants are presented and discussed. Some discourses may be more dominant or hegemonic than others, and it is essential to ensure that the voices of the most marginalised groups are heard (Arias-Arévalo et al., 2023). Most commonly, there are also 'official' visions of the future (Zackery et al., 2023) developed in supranational bodies, which can have a binding or non-binding nature in the transformations they require. The most paradigmatic example is the framework of the Sustainable Development Goals adopted by the United Nations, which establish a set of targets for 2030. It is crucial to acknowledge that, whether consciously or unconsciously, these official visions have an influence on the processes of future construction.

The role of the facilitator or leader of the process is to ensure a balance of power and to facilitate the creation of a shared vision among the community. The significance of its "shared" character is dual, on the one hand, its greater democratic legitimacy and, on the other hand in its greater *ex-post* adherence due to a sense of ownership (Francis, 2019, p. 2). The impact of the vision itself is hard to measure; and the impact of the shared vision can be found not only on the outcome of the visioning process, but also on the process itself (with further collaboration between stakeholders, trust building...) (Søgaard Jørgensen, 2013, p. 165).

Figure 2.17 Shared vision visualisation (MDT, 2010)



Source: (MDT, 2010)

Lastly, Campbell (2023), when assessing a vision development process within the education field highlights a series of risks that may arise in the resulting outcome: Narrowing down of concepts (p. 8), lack of representation of all voices/ideas in the last vision statements (p.12), lack of innovation (p. 9) and lack of real impact for policy production and action (p.12).

2.2.8. In short

Futures domain is the field that studies Futures. Since WWII, the majoritarian paradigm in this transdiscipline states that the future is not predetermined (and therefore, it cannot be forecasted), but there are multiple alternative possible futures to be explored and preferable futures to be constructed. The field is highly fragmented. The impossibility of obtaining evidence or facts about the future, converts the collection of “images of the future” one of the most important roles of the futures domain. These images can be sustained in various epistemological assumptions (pluralism, critical realism, poststructuralism, critical studies...) and the values behind them should be made explicit. There is an extensive catalogue of methods within the future domain, to be employed depending on the objective pursued by the futures researcher. Foresight has been defined by the European Union as “a systematic, participatory, future intelligence gathering and medium-to-long-term vision-building process aimed at present-day decisions and mobilising joint actions”. A shared vision is defined as a normative, and action-oriented image of a better future imagined in a collaborative way.

2.3. Social values in the futures domain

After delving into the branches of literature on social values and the futures domain, the third building block of the State of the Art is the review the existing literature to explore the intersection between these two fields, which, I can anticipate, remains relatively underdeveloped.

2.3.1. Fundamental, but understudied

The interconnectivity between social values and the field of futures studies is irrefutable. Indeed, most of the foundational authors of contemporary futures domain acknowledge this, particularly in the normative (preferable) futures arena, but also in the explorative branch of futures domain.

Elenora Masini argues that “values are always present in every approach to future studies” (E. Masini, 2006, p. 1163). For Mika Mannermaa (1986, p. 659) “futures research is basically a normative activity, and the role of values in futures research is more emphasised than in social sciences generally”. Kuosa (2012, p. 19) points out that “creating visions and studying values can be said to be the main objective of all futures research related approaches”. For Loveridge, individual behavioural patterns, linked with the modification of values and norms, is central to foresight processes (Loveridge, 2009, p. 147). More recently, the role of values has been categorised as critical or fundamental in “shaping the future” (Mills & Wilner, 2023, p. 2) or “determining the general direction of our collective pathways (...) promoting a shift toward more just and sustainable trajectories” (Harmáčková et al., 2023, p. 6).

Many authors connect the importance of values in futures domain with the more general positioning, increasingly recognised after postmodernism, that there is no or little value-free science, and therefore, no futures studies that are value-free (Douglas, 2009; Gaede, 2008; Shala, 2018). In that line, Amara & Salancik (1972, p. 424) claim that “value-free research or forecasting is meaningless or unattainable”. Similarly, Bell (2017, p. 319) states that “futures studies is not a “value-free” science. Rather, it is concerned with both the true and the good”. In fact, Bell dedicates the second volume of his book *Foundations of Futures Studies* to argue that objectively assessing value-judgements is possible, analyse strategies for judging the preferable and discussing universality of values. Both Amara and Bell agree that value-explicitness and openness to deliberation are what matters. Indeed Amara sees value-explicitness as a quality and utility requirement for undertaking futures studies (R. Amara, 1991).

Möller (2016) identifies four uncertainties about values: what values are supported, the specific content of each supported values, which values apply to an specific situation, and which values should be prioritised over others in a situation. An explicitness of values in a process should incorporate all these four dimensions of value uncertainties.

As demonstrated, the significance of values in futures domain has been extensively acknowledged, yet this recognition has not been effectively translated into the field of study itself. Values have been “overlooked” (Slaughter, 1996) and “understudied” (Mills & Wilner, 2023) in the futures domain leading to a gap in the literature (Panizzon & Barcellos, 2019). For this reason, the following section is devoted to analysing and systematising the existing limited

literature on the intersection between values and futures domain, with an emphasis on normative futures.

2.3.2. Existing interactions

There are multiple and diverse interactions between social values and futures domain. The main body of literature refers to the influence that certain group of values has in carrying out foresight processes. However, there are other authors who have identified additional innovative interconnections, in both directions. Mills & Wilner (2023) argue that foresight processes are valuable tools for identifying social values, allowing for a detailed analysis of the culture of the community participating in the process. Harmáčková et al. (2023) complement this view by pointing out that specific techniques, such as the “future personas” technique, can be particularly useful in uncovering participants' values. Conversely, Schwarz (2015) emphasises the significance of cultural products, such as films, theatre, literature and art, for companies and organisations in identifying trends and most probable futures. According to the author, despite the traditional reliance on media for weak signal detection, cultural products have been undervalued in foresight practice (Schwarz, 2015, p. 510).

Consequently, there is a two-way interaction between these approaches. While one argues that foresight processes can facilitate the uncovering and understanding of community values, the other asserts that cultural products can be a valid tool to identify probable (and even desirable) futures. Monteiro & Dal Borgo (2023, p. 21) also highlight the dual relationship, in their case, between strategic foresight and social imaginaries (highly linked with the concept of social values), “at the same time that beliefs, biases and blind spots shape the future perception and appreciation, strategic foresight itself may play an active, albeit limited, influence in shaping the collective representations and attitudes towards the future”. Nevertheless, the majoritarian body of work has been dedicated to understanding how values influence foresight processes.

One of the most all-encompassing works has been performed by Panizzon and Barcellos (2019), as they analyse the “cultural readiness” of a community for foresight. According to their work, “the cultural values of the group on dimensions such as innovation, risk, uncertainty, and long-term thinking can create synergies or disadvantages in the development of a Strategic Foresight project” (2019, p. 332). The authors argue that participating in foresight processes can influence and modify participant's values; for this reason, they perform an ex-ante and ex-post analysis and, in addition, three levels: national, organisational and individual. The same three level classification will be used following, complementing it with the existing additional literature in the intersection of values and futures domain.

2.3.2.1. What social values are relevant and how are they measured

National level

It is argued that futures studies should be integrated into policy-making processes, being embedded in the policy-cycle (De Vito & Taffoni, 2023). Therefore, generic foresight processes must be tailored to the specific context where it is developed in order to achieve its full potential and practical usefulness (Andersen & Rasmussen, 2014). This means, context matters for

futures domain (Andersen & Rasmussen, 2014; Keenan & Popper, 2008a; Panizzon & Barcellos, 2019; Saritas, 2013).

However, context is a broad word that can be operationalised in several ways. Saritas (2013) distinguishes between internal and external context of a foresight process. The external context is composed of the social, technological, economic, environmental, political and value-system (STEEPV) factors. The internal context is formed by the actors directly involved in the futures exercise.

In an effort to analyse the effect of contextual factors in the foresight “style”, Keenan and Popper (2008a) exploited the *European Foresight Monitoring Network* database, which at the time had collected almost 2.000 foresight activities all over the world. The authors distinguish two concepts: contextual landscape and foresight “style”.

- **Contextual landscape:** Regional political traditions, based Huntington (1991) and Hague & Harrop (2001) are used as the proxy for contextual landscape, leading to a distinction between established democracies (Northwest Europe and North America), third wave democracies (Southern Europe, South America and Eastern Europe), and Asian democracies. The authors themselves recognise the limitations of this approach but argue for a simplified concept in view of a wide complexity and high number of variables that contextual landscape could encompass.
- **Foresight “style”:** The history of using, diffusing and adopting foresight determines the foresight “style”. They distinguish the following regions: Northwest Europe, Eastern Europe, Southern Europe, North America, South America, and Asia. The indicators chosen to define the “style” are the following: territorial scale, sponsors, participation scale, time horizon, target groups, domain coverage, methods used, and codified outputs (Keenan & Popper, 2008a, p. 20).

Building on Keenan and Popper’s work, Andersen and Rasmussen (2014) explored the impact of national traditions and cultures on national foresight processes. They employed the construct “national political tradition and governance culture”, by including three theoretical developments: political traditions and foresight styles (Keenan & Popper, 2008a), varieties of capitalism (Hall & Soskice, 2001), and Hofstede’s dimensions of national culture (Hofstede, 2001; Hofstede et al., 2010). Varieties of capitalism are used to introduce socio-economic factors to the contextual analysis and Hofstede’s work encompasses values. According to their work, power distance and uncertainty are the most relevant dimensions in connection to foresight. The same values framework (Hofstede’s) is employed to analyse the national level at the foresight cultural readiness study (Panizzon & Barcellos, 2019). According to their work, all six Hofstede’s dimensions are relevant when analysing the impact of social values in foresight processes.

Therefore, there have been different perspectives on what social values are relevant when analysing the effect of external context and national culture have on futures activities and how to measure them. Some authors have tried to devise a typology based on the history of futures practice (Keenan & Popper, 2008a). In view of the limitations of this approach, most authors have opted for incorporating knowledge developed in other disciplines, such as economy via varieties of capitalism (Andersen & Rasmussen, 2014), or general values theory via Hofstede’s

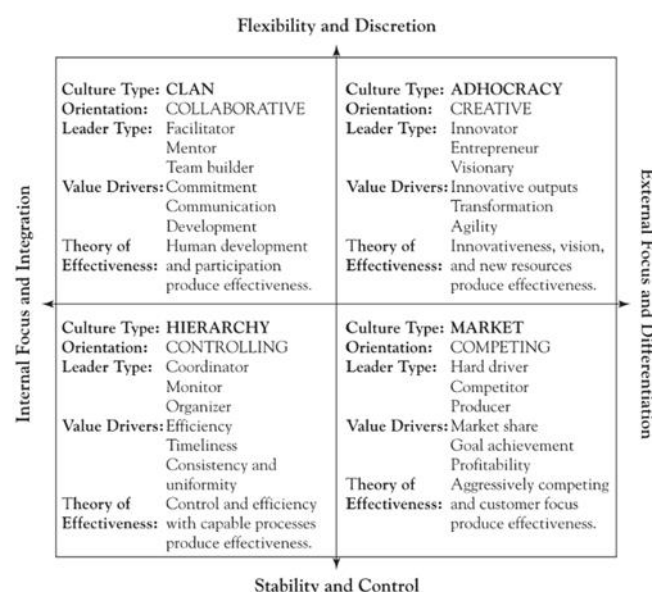
work (Andersen & Rasmussen, 2014; Panizzon & Barcellos, 2019). The work has been performed mostly at the country-level. However, since regional foresight is increasingly gaining momentum (Amini et al., 2021), further research would be required in other levels of analysis.

Organisational level

Despite national culture influences the diverse organisations in the territory, each organisation has its own differentiated organisational culture; foresight can be an exercised performed as part of an organisation's strategic planning activities, or a person in representation of an organisation can also participate as an actor in a foresight exercise at a local, regional or national level. For this reason, the second level of analysis is the organisational (Panizzon & Barcellos, 2019).

The concept of organisational culture has evolved widely, and it encompasses “from the interpretation of rules and norms, to a system of values shared across the organisation, or the organisational ability to build a common ideology” (Alcalde Heras et al., 2017, p. 273). Many diverse theoretical and analytical frameworks have been developed for organisational culture. Among them, the Competing Values Framework by Cameron and Quinn (2006) has been selected as the most suitable to analyse how organisational culture affects foresight (Panizzon & Barcellos, 2019; Wiener et al., 2018). There are four resulting organisational culture types depending on two axes: flexibility or stability, and internal or external focus: clan culture, adhocracy culture, hierarchy or market culture (see Figure 2.18). Behind each of the typologies there are different inherent values, leadership styles and levels of openness.

Figure 2.18 Competing Values Framework (Cameron & Quinn, 2006)



Source: Cameron & Quinn, 2006, p. 46

Wiener, Gattringer and Strehl (2018) found that an open organisational culture is a precondition to participate in open foresight processes, i.e. foresight collaboratively undertaken together with other organisations. The archetypes of clan and adhocracy cultures foster openness whereas market and hierarchy models prevent openness (2018, p. 697). This is a valuable starting point for research, but additional work is required to better understand how organisational culture can influence a wider foresight process (at a national, regional or local level) where different types of actors intervene (public and private, different sizes, different sectors...) with an external facilitator.

Individual level

Foresight has also been defined as an individual or organisational capacity or competence (Conway, 2015). Following this standpoint, Amsteus (2008, 2011) analysed the different perspectives of time that individuals (particularly managers) can have and how they affect foresight processes, by developing a scale. This scale is employed by Pannizon and Barcellos to analyse the individual level values affecting futures processes.

However, there is a body of literature that has developed a typology of *foresight cognitive styles* (Bourmistrov & Åmo, 2022; Dian, 2009; Gary, 2009; van der Laan & Erwee, 2012). Cognitive styles are “the style with which individuals cognitively respond to change and their envisioned prospects of the future” (van der Laan & Erwee, 2012, p. 377). Dian (2009) identifies six different foresight cognitive styles: futurist, activist, opportunist, flexist, equilibrist and reactionist. The six styles have been constructed in view of four different criteria: the temporal orientation, propensity to action, structural orientation and the holistic or dual thinking. The first two criteria build on Kluckhohn’s work (Kluckhohn, 1951). Gary (2009) reduces the typology of the Foresight Styles Assessment to four: framer, adapter, tester and reactor, also followed by Van der Laan and Erwee (2012). Bourmistrov and Åmo (2022) add a fifth style to the latter, with the role of the actor.

The individual level analysis is highly based on the literature of organisations and management. However, two learnings can be extracted: individual values about time matter for foresight, and the values of the leader of foresight processes acquire particular importance.

Table 2.7 Summary of value models by level

Level	Model
National	- National cultural dimensions (Hofstede) - Political traditions / Contextual landscape (Huntington; Hague & Harrop) - Foresight “styles” (Keenan & Popper) - Varieties of capitalism (Hall & Soskice)
Organisational	Competing values framework (Cameron & Quinn)

Individual	• Managerial Foresight (Amsteus) • Foresight cognitive “styles” (Dian; Gary)
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Source: Adapted from Panizzon & Barcellos (2019)

2.3.2.2. Foresight elements influenced by values

Having delineated the principal value frameworks that facilitate the analysis of their impact on the futures domain, it is now appropriate to highlight the specific elements of a futures project in which they exert a significant influence. According to Keenan & Popper’s (2008a) findings:

- Contextual landscape matters for: domain covered, time horizon, methods used. Saritas (2013) argues, in a similar line, that external context is fundamental to define the agenda of the futures project and its content. The methods used are usually linked with the type and degree of participation in foresight processes.
- Contextual landscape does not seem to matter for: territorial scale and sponsorship (who funds the futures project).
- Rather than context, foresight style matters for: target groups, outputs of the process, and methods employed.

The findings are in line also with Andersen & Rasmussen (2014) that state that social values affect mostly in three manners “the use of longer-term planning tools such as foresight in general, the selection of foresight methods, and the inclusion of experts and citizens” (Andersen & Rasmussen, 2014, p. 7).

Douglas (2009) distinguishes two types of roles that values¹² can play in scientific process. Shala (2018) applies this approach to the field of foresight and futures processes. The direct role implies that values are “the stand-alone reasons to motive our choices” (Douglas, 2009, p. 96). The indirect role has a part in decision-making when there is uncertainty or incomplete information. A direct role of values is justified in two elements in the scientific process: the thematic focus (which is highly influenced by funding or target groups) and the methodology (Douglas, 2009, p. 88). In addition to those elements, social values acquire importance in the discussion, conclusions and recommendations part of foresight (Shala, 2018, p. 165). Following the classification between explorative and normative futures, Shala (2018) argues the particular relevance of social values for normative futures, while warning that in relation to explorative future “predetermined social and ethical values may also impede the open, alternative-based aim of explorative futures thinking” (Shala, 2018, p. 165).

Therefore, there is wide consensus between those that have analysed in which elements of the futures process social values have a direct role: thematic focus (Douglas, 2009; Keenan & Popper, 2008a; Saritas, 2013; Shala, 2018), methodology or method used (Andersen &

¹² In her work, Douglas (2009) distinguishes between cognitive values (e.g. simplicity, explanatory, consistency, fruitfulness...), social values (e.g. justice, freedom, social stability, innovation, economic stability, sustainability) and ethical values (e.g. human rights, avoiding pain of sentient beings, concern for death, ethical acceptability of risk). Shala (2018) follows the same classification.

Rasmussen, 2014; Douglas, 2009; Keenan & Popper, 2008a; Shala, 2018), and degree of participation (Andersen & Rasmussen, 2014; Keenan & Popper, 2008a), being the last two elements deeply interconnected.

2.3.3. Social values and normative futures

As previously demonstrated, social values exert a significant influence on futures domains in general. This influence is particularly pronounced in the context of preferred futures (Amara, 1981) or normative futures (Kuosa, 2012) as many authors have declared. Examples include, Eleonora Masini “‘visions’ approach focuses on ‘desirables’ and emphasises values; although values are always present in every approach to future studies.” (E. Masini, 2006, p. 1163); or Roy Amara “the third type of future (preferable futures) is deeply connected with values” (R. Amara, 1991). After all, social values, by definition, are criteria that define what is “desirable” (Kluckhohn, 1951) or “end state of existence is personally or socially preferable to another” (Rokeach, 1973) (see [Table 2.1](#)).

The increasing worry about the future has clearly deepened as a consequence of the climate crisis. In this context, numerous studies have emerged, in an attempt to identify which values are behind the support of sustainable future visions and narratives, that can ultimately transform individual and collective behaviour. Environmental elements are also highly important in the framing of competitiveness for wellbeing construct. The number of publications in this field has increased significantly in recent years, particularly linked with the work by the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES)¹³ (Arias-Arévalo et al., 2023; Bouman et al., 2018; Goodson et al., 2024; Harmáčková et al., 2023; IPBES, 2022; Pascual et al., 2023; Portus et al., 2024; Raymond et al., 2023; Schaal-Lagodzinski et al., 2024; Steg, 2016; Werlen, 2015).

Actors in different contexts as well as across spatial, temporal, and political scales, hold different values shaping their vision of what the world should look like in the future. These values, with associated relational dynamics and inherent power asymmetries, can influence the type of future outcomes that they consider desirable and thus worth pursuing.

(Harmáčková et al., 2023, p. 2)

IPBES has launched a methodological assessment to better understand the different ways in which people value nature and how it impacts decision-making about nature (Pascual et al., 2023). The Assessment contains a typology of values that distinguishes, from broader to more specific, between: world-views and knowledge systems, broad values, specific values, and value indicators (IPBES, 2022). Goodson et al. (2024) analyse the different value orientations that are behind broad values, which include: egoistic (i.e., concern for oneself), hedonic (i.e., concern for short term pleasure), biospheric (i.e., concern for nature), altruistic (i.e., concern for others), and

¹³ IPBES is an independent intergovernmental body created under the umbrella of the UN system.

eudaimonic (i.e., concern for having a meaningful live and personal growth for society). The different orientations can be linked to Schwartz's value framework (Goodson et al., 2024).

Some studies have indicated a relationship between foresight instruments with normative use (e.g. scenarios or visions) and social values. For instance, Harmáčková et. al (2023) analyse the values that underpin (un)sustainable and (un)just futures. Their research identifies three scenario archetypes (or scenario groupings) and point out at the values that are associated with them.

- First, dystopian scenarios include those referring to "Regional Competition", "Inequality", and "Breakdown". They portrait a future in which there is extreme competition, and inequalities proliferate. Individualistic and materialistic instrumental values are associated with dystopian scenario archetypes.
- Second, economic optimism archetypes can be grouped in "Business as Usual", or "Economic Optimism" scenarios. They depict a world where economic growth continues being the major objective and it drives development. Values behind economic optimism are individualistic and materialistic instrumental values, as well.
- Third, sustainability scenarios include "Global Sustainable Development" and "Regional Sustainability". A greater plurality of values is observed in this research in association with just and sustainable future scenarios.

Paulson and Büchs (2022) study the public acceptance of post-growth, explicating the majoritarian values of those supporting post-growth visions of the future and their socio-economic conditions. As for values, the authors find that environmentalism, collectivism and post-materialism were identified as the values associated with post-growth visions. Regarding the economic and social profiles, disadvantaged people (lower incomes, lower education, unemployment) were found to support less post-growth visions. Their methodological approach is mixed, including a quantitative analysis of EVS data, building on Inglehart's work.

Also connecting social values with visions, Holmes et al (2022) identify two majoritarian visions about the rural landscape in west Wales, and find that relational and eudemonic values associate with them. According to their work "different visions emerged from shared facts but divergent values." (Holmes et al., 2022, p. 163).

Other thematic fields beyond sustainability have also implemented visioning approaches and explored the connection with values, such as in business strategy settings (Ward, 2011) or educational policy-making (Campbell, 2023). Indeed, Campbell (2023) in the field of education, finds that there are "important interrelationship between vision and values for agenda-setting in policy." (Campbell, 2023, p. 1).

For this reason, it is essential to understand "which and whose values shape the development of imagined futures, as these futures have the potential to become socially performative through guiding policymaking or occupying places in social imaginations" (Harmáčková et al., 2023, p. 6). Stakeholder involvement has been justified in different manners historically, deeply connected with social values concepts.

First, it was understood as a management technique, as the fact of including different stakeholders' values in the decision-making process, results in a higher sense of ownership of the project (Mathur et al., 2008). Indeed, knowledge alone is not sufficient to activate action, making sense of the information in the context of their own values and beliefs is essential in order for a process to be transformative (Werlen, 2015). Second, an ethical perspective of stakeholder engagement arose, justifying the involvement on equity and democratic principles. Third, stakeholder engagement is understood as a dialogue between different values and interests, resulting in a social learning process (Mathur et al., 2008). Therefore, a shared visioning process, that is imagined collaboratively, inevitably means a dialogue between different values of participants.

The role of the process facilitator or leader is also essential, since, on the one hand, "leadership is inseparable from values" (Marga, n.d., p. 104); and, on the other hand, the leader needs to perform a role where power dynamics are balanced (Arias-Arévalo et al., 2023), allowing room for a free, safe and equitable sharing of values and interest in the process, regardless of the hegemonic or minoritarian positioning of the participant.

Different narrative discourses based on varying values generate expectations in citizens, which the administration is then obliged to fulfil (McLaughlin, 2022). However, those expectations are not always fulfilled. Indeed, values influence behaviour, but the recognition of certain values does not mean that action will always be coherent with them. This phenomenon has been named value-action gap or value-action dissonance. It has been defined as "the distinction between how one thinks they should or might act, and what they in fact do in reality" (Portus et al., 2024, p. 3).

Early studies of value-action gap (environmental arena), go back to 1960s, starting from the concept of cognitive dissonance (Festinger, 1957), understanding by dissonance the personal tension or stress experienced when an individual's actions contradict or are inconsistent with his or her values or beliefs" (Portus et al., 2024, p. 4). Despite long-term research, additional work is required to better understand the multiple and multi-layered factors and wider context that influence choice, agency and action (Portus et al., 2024, p. 5). Certain avenues to overcome value-action gap point at education or improving connection with emotions.

2.3.4. In short

The interconnectivity between social values and the field of futures studies is irrefutable. Indeed, most of the foundational authors of contemporary futures domain acknowledge this, particularly in the normative (preferable) futures arena. However, the interconnections have been understudied. The majoritarian (although limited) existing literature revolves around the effects of social values in futures processes. Three levels (national, organisational and individual) with their respective value-frameworks (see [Table 2.7](#)) are relevant to assess cultural readiness to perform foresight. Social values have a direct role in three foresight elements: theme, method and degree of participation.

The importance of social values is particularly pronounced in normative futures, after all, social values are criteria to establish a “desirable” and “preferable” state. Particularly relevant in studying this intersection has been the work on constructing environmentally sustainable future visions and discourses. The characteristic of a shared vision being imagined collaboratively, raises questions regarding who is involved in the visioning process and whose values are being represented, i.e. representativity, legitimacy and power. In this context, studying participants values and leadership values acquire fundamental importance, in addition to the analysis of the cultural context they are embedded in.

Last, a shared vision is also action-oriented, however, it does not guarantee action. The value-action gap is a long-recognised phenomenon, since the alignment of a vision with one's own values fosters its mobilising and transformative capacity, but there are multiple other factors that can prevent it from being translated into action, generating cognitive dissonance.

Chapter III

Euskadi 2040: regional visioning in the Basque Country

After having performed an extensive literature review on social values, futures domain and their intersections, and summarised the main theoretical underpinnings in the arena, I will now proceed with the experiential learnings based on a case study of a visioning exercise at the Basque Country region. The objective of this chapter is dual. On the one hand, the description of the case study has value on its own (Flyvbjerg, 2006) by illustrating how a visioning process has been undertaken in a region. Indeed, how visions emerge or are constructed has been identified as a gap in the literature by Beer & Sotarauta (2021). The case description will be presented in connection with relevant previously mentioned theory. On the other hand, the identification of key experiential learnings that can be brought to the conceptual-analytical framework of this dissertation, regarding how social values influence visioning processes.

This chapter will provide an in-depth explanation of the process undertaken in the “Euskadi 2040” initiative, with the following structure: first, an introduction that explains the definitional characteristics of the initiative; second, a detailed description of the shared visioning process, including the multi-level, multi-actor and interdepartmental process carried out; fourth, the explanation of the attempt to develop a shared agenda to bring the shared vision to live; finally, a short summary will be provided at the end of the chapter with six key experiential learnings to bring to the conceptual-analytical framework ([Chapter IV](#)).

3.1. Euskadi 2040 initiative

The Basque Country is a region located in the north-east of Spain, bordering France. Some distinctive features of the region include its rich institutional conglomerate and high fiscal and competence autonomy (Aranguren et al., 2021). Despite being small in terms of inhabitants with (just over 2 million), the region has achieved comparatively solid results in terms of competitiveness and wellbeing for its citizens.

Like many other regions, some of the major challenges of the Basque Country towards the future include the implementation of the necessary transformations in the climate field, or the responsibility to generate wellbeing for its citizens, in the present and future generations. These phenomena require transformative public policies beyond traditional planning approaches, and the generation of broad social consensus to support them; since in regions, as multi-level and multi-actor governance systems, no single actor has the power to determine other actor's behaviours (J. Karlsen & Larrea, 2014).

The research project “Competitiveness for inclusive and sustainable wellbeing in the Basque Country” (Euskadi 2040) emerged with the objective of identifying what the competitiveness challenges of the Basque Country are and how they are changing, in order to build a competitiveness for inclusive and sustainable wellbeing model for the next generation. The case has been recognised as a “good practice” in strategic foresight arena by the Flanders Chancellery & Foreign Office (Flanders, 2024), as a “regional revelation” by the OECD (Stancova et al., 2024) and featured in a foresight inquiry as an interesting case study by the Joint Research Centre of the European Commission (Matti & Cappellano, forthcoming).

Euskadi 2040 initiative was launched in July 2021, and it has been built in collaboration between the Basque Government and Orkestra- the Basque Competitiveness Institute. Having in mind the objective of identification of the challenges, the core team or “driving group” soon realised that the challenges would highly differ depending on the preferred future that was projected. For this reason, the initiative shifted towards collaboratively constructing a shared vision for the future of the region, backcasting the main challenges from that point towards the present. In this section, a more in-depth description of the project leadership and the main characteristics will be provided.

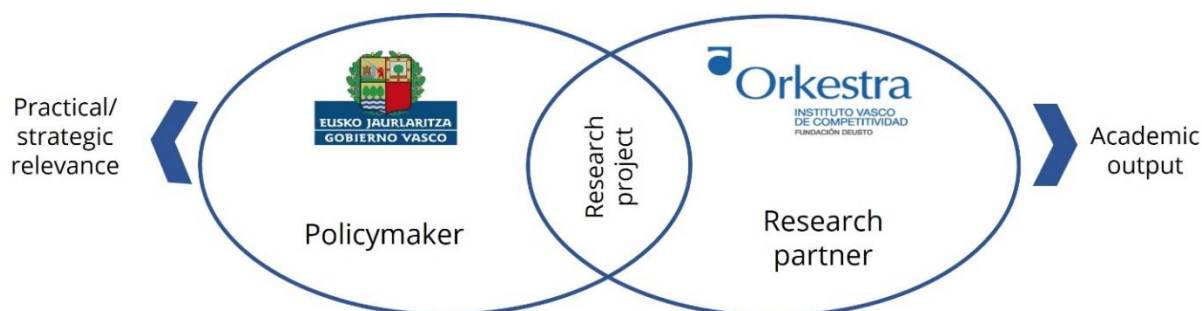
3.1.1. Project leadership

Orkestra, the Basque Competitiveness Institute, in its role as a research partner, has facilitated the visioning process by accompanying the Basque Government (see [Figure 3.1](#)). The vision has a competitiveness for wellbeing thematic focus, which is why, in addition to the Department of Economic Development, Sustainability and Environment, the Department of the Presidency (Lehendakaritza) has also been involved from the outset, due to its broader perspective. Both organisations make up the so-called driving group of the Euskadi 2040 project.

It is important to note that the project emerged by initiative of the research institute. Initially, the research team's methodological approach included a wider driving group, comprising government representatives but also provincial and local representatives of the main institutions of the Basque region. However, it was subsequently agreed that the group should

be limited to the aforementioned participants, in order to enhance the group's agility and effectiveness.

Figure 3.1 Roles of the driving group of Euskadi 2040



Source: Euskadi 2040 project

The process was formalised via a collaboration agreement between the government and the research institute. The researchers have provided methodological support and 'expert' knowledge (on competitiveness, wellbeing, futures, and collaborative governance, among others) to the government. This can be conceptualised as a way of institutional arrangement of foresight within the government, via external capacity (Greenblott et al., 2018). The first agreement covered a timeframe, from July 2021 to September 2023, followed by a second agreement from January to December 2024.

3.1.2. Key characteristics

As pointed out in the state of the art (see 2.3.2.1), Keenan and Popper (2008a, p. 20) employ a series of indicators in order to define what they call the foresight "style". The authors include the following indicators: territorial scale, sponsors, participation scale, time horizon, target groups, domain coverage, methods used, and codified outputs. Since these elements provide a clear overview of the main characteristics of a foresight project, I will employ them to summarise Euskadi 2040 initiative and facilitate the general understanding of the reader, before proceeding into a more in-depth description of the process and its outcomes.

Table 3.1 Foresight "style" of the Euskadi 2040 initiative

Indicators (Keenan & Popper, 2008)		Euskadi 2040 characteristics
Territorial scale of foresight	Sub-national; National; Supra-national	Sub-national, concretely, regional

Foresight sponsor	Public, private, voluntary, local, national or international	Public and regional: Basque government (Economic development department and Presidency)
Participation scale	< 50; 51-200; 201-500; > 500	Between 201- 500 people, includes citizens, and local and international actors.
Target groups	Government /agencies / departments; firms; research community; trade bodies / industrial federations; intermediary organisations; trade unions; NGOs; others	The region as a whole, including government departments and agencies, firms, NGOs (and third sector), trade unions, citizens...
Domain coverage	Manufacturing; electricity, gas and water supply, Agriculture, hunting and forestry; Education; Health and social work; Transport, storage and communication, public administration; Construction ...	Competitiveness for inclusive and sustainable wellbeing (see page 19)
Time horizon	5, 10, 15, 20, 50 years	20- years ahead (to 2040)
Methods used	They identify 16 majoritarian methods, including, among others: literature review, expert panels, scenarios, trend extrapolation, futures workshops, interviews, brainstorming, surveys, SWOT, Essays, Delphi, Modelling and simulation...	Methods have varied depending on the phase of the process: 1. Evidence-based diagnosis: Futures triangle logic (past, present and future) diagnosis, Quantitative indicators, Qualitative analysis, Trends analysis, Literature review. 2. Participatory contrast: Workshops, Contrasting meetings, Interviews, Gaming / serious games 3. Outcomes / outputs: Visioning, Backcasting, Systems thinking, Indicators, Storytelling / discourse / narrative construction.
Codified outputs	For instance, policy recommendations, scenarios, list of key technologies, roadmaps, trend analysis, ...	• Shared vision statement, dimensions and competitiveness challenges (Appendix V) • List of key objectives and long list of monitoring indicators (Appendix VI) • Informal impacts have also been achieved, such as the influencing of provincial policies.

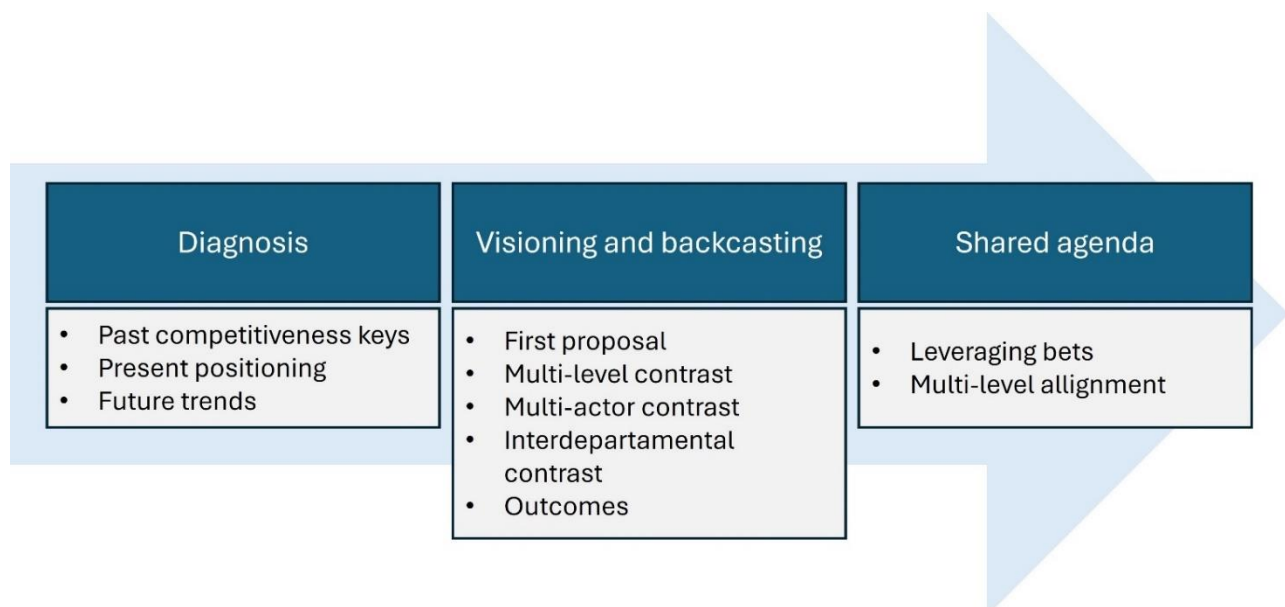
Source: Own elaboration based on Keenan & Popper (2008)

3.2. The process of Euskadi 2040, from the optic of social values in the futures domain

Once the defining aspects of the initiative have been identified, it is time to conduct a more detailed examination of the process and content of the initiative. [Figure 3.2](#) shows the time sequence of the process of building the Euskadi 2040 Shared Vision.

The first step for its development was to carry out a diagnosis of competitiveness for wellbeing in the Basque Country (see section 3.2.1). Based on the diagnosis, an initial Vision proposal was generated within the driving group (made up of representatives of the Basque Government and Orkestra) (see section 3.2.2.1 and 3.1.1). The vision has been built collaboratively, and specifically, it has materialised in four areas of collaboration to arrive at a shared narrative: academic-territorial, interdepartmental, multi-level, inter-institutional and multi-agent collaboration (the participatory process is explained in the sections 3.2.2. to 3.2.5). The visioning and backcasting phase concludes with the main outcomes achieved in the process (see section 3.2.2.5). Lastly, the Euskadi 2040 vision is conceived as an instrument for action, and for this reason, an important part of the process has also been the generation of a shared agenda for its achievement, including a series of objectives and monitoring tool (see 3.2.3).

Figure 3.2 Euskadi 2040 process timeline

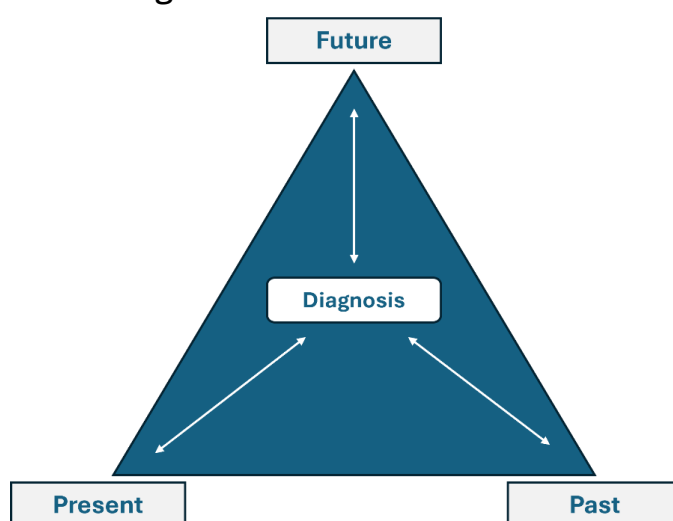


Source: Own elaboration

3.2.1. Diagnosis

The starting point of the Euskadi 2040 process was the development of a diagnosis of competitiveness for wellbeing. The diagnosis is based on the logic of the futures triangle that Inayatullah (2012) employs for defining plausible futures, considering the present and past situation, in addition to the future's trends. This goes similarly in line with the first three steps of the visioning process of the Manoa school by Jim Dator (see 2.2.7.2), which are, first, "anticipating the past;" second, "understanding the present"; and third, "forecasting aspects of the future".

Figure 3.3 The diagnosis triangle



Source: Own elaboration

In order to establish the bases for future competitiveness, it is essential to know where to start from and the main competitive strengths of the territory; however, it seems clear that in order to guarantee future wellbeing, it is not enough to extrapolate successful models from the past (OPSI, 2020). It is necessary to make a parallel analysis of global trends and their impact on it, in order to obtain a clue as to the social, economic and environmental evolution that is envisaged, in which to locate the desired future.

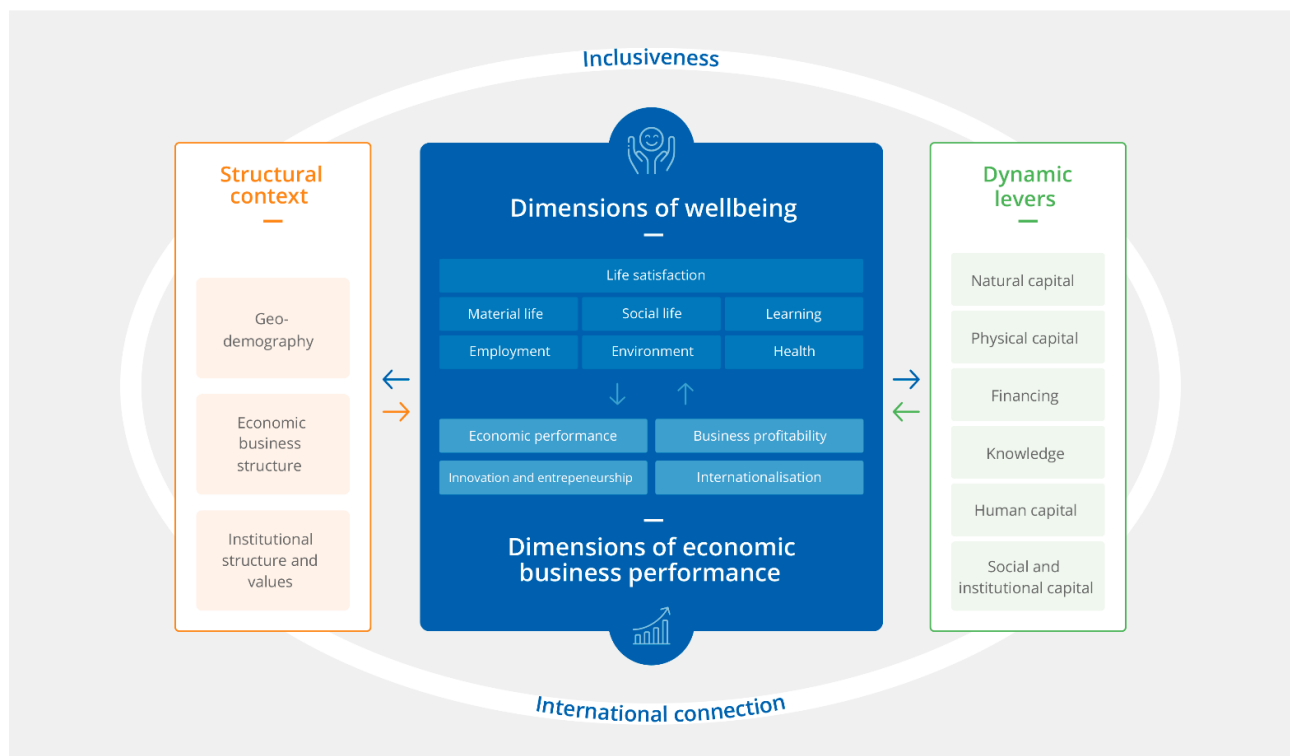
It is precisely these three aspects that were analysed to carry out the preliminary diagnosis of competitiveness for the construction of the Vision: analysis of the positioning in competitiveness for well-being, analysis of the keys to competitiveness that have brought us this far, and analysis of the projections for the future.

The analyses have been developed in the first instance by the research team, and, then, contrasted within the driving group. This shared reading of the analyses has made it possible to enrich the diagnosis of the academic profile with knowledge from practice provided by the policymakers.

3.2.1.1. Present diagnosis: quantitative and qualitative analysis

The following is a summary of the positioning of the Basque Country in competitiveness for wellbeing based on the framework developed by Orkestra (Orkestra, 2021). The framework is composed by different parts: wellbeing dimensions, economic business performance dimensions, structural context and dynamic levers. The indicators have been selected according to criteria of suitability and comparability. The positioning is performed in comparison with Spain, Germany (as a benchmark country in Europe) and the European Union (with 27 members).

Figure 3.4 Competitiveness for wellbeing framework



Source: Orkestra (2021)

The framework (see Figure 3.4) explicitly states that values, together with the institutional structure, are contextual elements that determine the competitiveness for wellbeing model of the territory; in addition, depending on the interpretation, values can also be part of various capitals, namely social capital (Putman, Coleman, Bourdieu), cultural capital (Throsby, 1999), or institutional capital, which are considered “dynamic levers” in the framework.

Despite a wider diagnosis was performed during the visioning process, the aspects connected with social values will be included in full below, due to its importance for the topic of the present thesis. The full diagnosis is available at Izulain Alejos et. al. (2023).

Dynamic lever | Social and institutional capital

Framework policies

- Long and pioneering career in cluster politics.
- SDG development framework, consistent with the development of “competitiveness in solidarity” model.
- RIS3 consistent with existing capabilities and development opportunities for transitions.
- Continuous and coherent commitment to promote industrial policy, in line with the rest of the framework policies.
- Richness in intermediate organisations with different functions (cluster driving organisations, local development agencies, technology centres, vocational training centres) and in the dynamics of the RIS3 piloting groups.

Institutional quality and strategic capacity

- There are capacities to develop a strategic vision by the public administration (at various levels), with a predominance of the planning approach.
- The region with the best institutional quality index (includes corruption and impartiality) in the Spanish state and in the 25% of the best European regions according to the Institutional Quality Index of the University of Göteborg.
- Positive institutional capital, with progress in the development of multilevel governance, but it needs to be further strengthened.

Social capital

- Well-established experience and culture of public-private, private-private and public-public cooperation. This is indicated by the % of SMEs cooperating in innovation or the % of companies cooperating with each other, which is much higher than in Spain, Germany and the EU-27.
- Comparatively low rates of appreciation of the legal system and comparatively low levels of trust in other institutions such as the police, national parliament, and the European Parliament.

Structural context | Institutional structure and values

Political, administrative, and legal system

- Economic agreement and autonomy of powers and budget.
- Public sector size similar to Spain, larger than Germany, but considerably smaller than Nordic countries according to Eurostat.
- Rich institutional architecture.
 - o On the one hand, it makes it easier to reach citizens: higher budget expenditure by local administrations (21.7% compared to 10.9% in the EU-27 and 8.2% in Germany).
 - o However, it requires a need for efficiency in the face of potential overlapping, lack of clarity in the distribution of powers...

- Labour relations: State labour framework, but singularity in its own agents (ELA and LAB). Importance of collective bargaining, in relation to the number of collective agreements signed, typology and coverage. Lack of collectivism/idea of a common project in the business-labour culture. A commitment to confrontation by the majoritarian trade union and, therefore, elevated levels of strikes, although with a general downward trend.
- High weight of the social economy in the Basque Country, and progress in inclusive-participatory company models, as shown by the parliamentary agreement to promote them.

Culture and values

- The Basque society places high value on effort, as evidenced by the importance it ascribes to this quality. The value of work is of paramount importance, ranking only behind that of the family unit. Among the qualities of work, young people (under 50) tend to prioritise working hours and salary over the possibility of personal development.
- The autonomous community of the Basque Country exhibits the highest absenteeism rate in Spain.
- Collectivism and cooperation (e.g., auzolana) are highly important, in connection with the sense of identity (e.g., with its own language).
- Regarding tolerance and inclusion, the Basque Country's values are above the EU-27 average. This is evidenced by relatively high levels of tolerance towards immigrants, minorities and homosexuals. However, there is a notable exception in the case of the indicator for volunteering (formal or informal), which is below the EU-27 average. This is according to the European Regional Social Index Progress, in the analysis for the Basque Country 2020.

3.2.1.2. Futures diagnosis: trends and megatrend analysis

Anticipating aspects of the future is a key component of the visioning process (Dator, 2017, 2019). This includes an analysis of the existing trends and megatrends, as a consequence of globalisation and global interconnection. In the Euskadi 2040 process, two tasks were conducted: on the one hand, a scanning of secondary sources of trend reports (Dugarova & Gülasan, 2017; EC, 2021; OCDE, 2021), and on the other hand, a following analysis to examine the impact of trends in the Basque Country (EUSTAT, 2022; INE, 2020) in areas six areas: market-offer, demand, people, technology, planet and employment.

Following Hajkowicz et. al. (2012, p. 2), megatrends can be defined as significant shifts in environmental, social and economic conditions for the next decade. A summary of the identified megatrends is included as [Figure 3.5](#), and a full description of the trends and the impact in the region are available at Izulain Alejos, et. al. (2023).

Figure 3.5 Euskadi 2040 Futures trend diagnosis list

General trends	Trends connected to business environment
• Geopolitical shifts Increasing influence of East/South as oppose to West/North, increasing populism (far-right parties), protectionism... • Social shifts Poverty and inequality increasing, aging, increasing migratory fluxes, urbanisation, new consumption habits and short-termism • Environmental shifts Increasing demand of natural resources, but further emphasis on circular economy • Transversal: Shock and crisis situations	• Technological revolution • Shortening life-cycles of products • Employment flexibilisation and new labour contracts • New configuration of value-chains • Globalisation and market integration • Capacity to face the unexpected • Financialisation of the business

Source: Own elaboration based on Izulain et. al. 2023

Among the trends identified, a prioritisation exercise was carried out, linked to the relevance of the trends when developing the competitiveness for the wellbeing model of the future of the region. On the topic, policymakers highlighted the following:

"It is agreed that particular attention needs to be focused on macro trends related to the future business environment, specifically: the technological revolution (importance of imitating good practices and capacity to adapt), the flexibilisation of employment and new labour relations, globalisation and market integration (of particular concern). It is also evident that there has been a move of decision-making centres to abroad, along with alliances and mergers. Furthermore, the Basque Country has previously demonstrated an aptitude for capitalising on opportunities associated with market integration. However, changes in value chains and the financialisation of business have also emerged as pertinent considerations."

Extract of minutes from 19/10/2021.

3.2.1.3. Past diagnosis: identifying singularities or competitiveness "keys"

The past, in accordance with the principle of path dependency, is one of the main determinants of the level of regional development (Harmaakorpi, 2006). Manoa school also considers that the appreciation of the past is the first step towards a visioning process (Dator, 2017). There are decisions taken in the past, named "competitiveness keys" of the past, which characterise a region.

When it comes to constructing a vision of the future, there can be different approaches, from wanting to create a model that is completely different from the past (that is future-oriented), to wanting to retain certain elements that are differential from the past (Iparraguirre, 2023). In this case, the position of policymakers in this respect did include the preservation of designated elements from the past to be incorporated into the vision. This balance between continuity and novelty has been a characteristic of the Basque region also previously (Morgan et al., 2020).

"It is of high value for the vision to maintain certain unique features of its own, even though, at first glance, they may seem to go against global trends. For example, the cooperative nature of our fabric."

Policymaker, 19/10/2021

The distinctive elements of the Basque Countries' competitiveness model identified in the process are listed below. The elements related to social values and cultural aspects are explained more in detail.

Figure 3.6 Competitiveness keys from the past

- Search for a balanced socio-economic model, consistent over time, with the industrial policy a central axis.
- Elevated level of fiscal and budgetary autonomy, with numerous direct competences (such as education, health, transport, economy, and economic sectors) (Aranguren et al, 2012).
- Public-public and public-private collaboration highly extended in the region.
- Advanced and specialised industrial sector.
- Sophisticated scientific-technological infrastructure
- Pioneer in the development of a cluster policy and sectoral structuring.
- Entrepreneurial and systemic internationalisation, exemplified by 'hidden champions' or companies specialising in highly customised and sophisticated components operating in niche markets (Kamp et al., 2017).
- Emphasis on training and learning, good positioning in tertiary education, continuing education, and vocational training.
- Culture and values of rootedness, effort, and work. There has been a high sense of belonging and a high-level of business, political and social commitment to the territory. Furthermore, Basque culture has also been associated with a high capacity for work, high identity solidarity, great value for effort and social recognition of cooperation. Proof of this is the business model of cooperatives that is recognised worldwide and associated with the territory.

Source: Own elaboration based on Izulain Alejos et. al. (2023)

3.2.2. Shared visioning and backcasting

Once the diagnosis from the triple perspective was performed (present, past, and future) the next step of the process was the development of a vision proposal. At a first instance, the objective of the Euskadi 2040 process was to identify how the challenges of the future generation were evolving. However, in order to map the competitiveness challenges, it was necessary to establish a preferable direction towards the future. Once the starting point and destination have been established, it is possible to identify the optimal route and the potential difficulties or challenges that may be encountered along the way.

“It is necessary to make explicit the vision of the Basque Country for the next generation, in order to define this uniqueness and to direct the keys to competitiveness for wellbeing. In a first approach, the Basque Government proposes to develop on the existing pillars: health, specificities in education (especially the vocational training model), social balance and a technological and internationalised industrial model (and related advanced services)”.

Extract of the minutes 19/10/2021.

Thus, the visioning and backcasting exercises were carried out simultaneously, continuously maintaining a dialogue between the preferable future and the present reality, in order to identify the gaps (i.e. competitiveness challenges) among the two. Formulating the vision in terms of 'challenges' made the 'action-oriented' feature of a vision (see 2.2.7.2) latent, leveraging its mobilisation power.

3.2.2.1. Project leader's first visioning and backcasting proposal

After a first phase of diagnosis of competitiveness for the wellbeing of the Basque Country, an initial Euskadi 2040 Vision proposal was developed within the driving group, i.e. co-generated by the Basque Government and Orkestra, in its role as a research partner. From the outset, it was necessary to formulate the Vision not only in written format, but also to have a visualisation that would facilitate its understanding and communication, contributing to the narrative power of the vision.

The following section will explain the cogeneration process of the first proposal for the Vision by the project leadership team. In the interest of providing a concise narrative, only the significant alterations to the vision's dimensions are presented below, with the acknowledgement that each of these dimensions is followed by a number of competitiveness challenges.

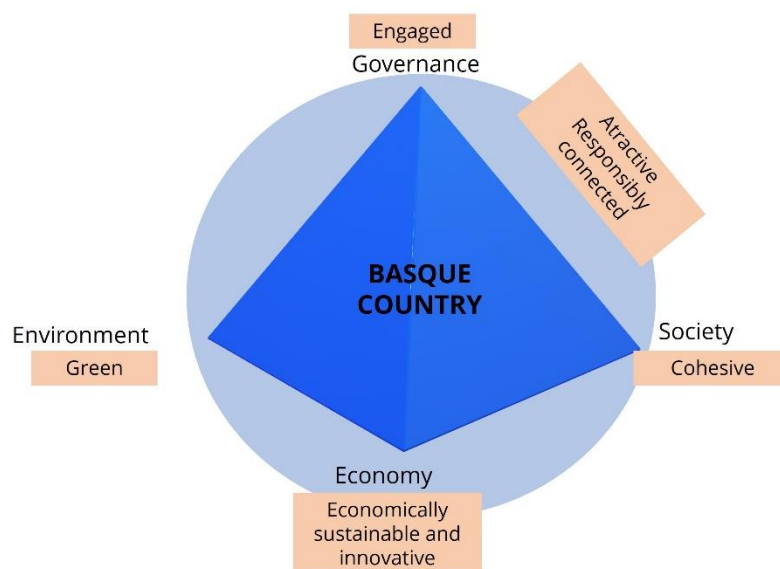
First version developed by researchers

The first version of the vision was developed internally and solely by researchers. Concretely, an internal core group was set up within the research institution, including senior researchers specialised in several domains of territorial development and competitiveness. The first version was built on the basis of the three classic pillars of sustainable development (economy, society and environment), and a fourth element that brings them together in pyramidal form: governance, with a high influence of the academic literature. Furthermore, it considers the globalised nature of the world, as symbolised by the circle. The vision is summarised in the following statement, and visualised as [Figure 3.7](#).

“We are committed to a Basque Country that bases its competitiveness on innovation, which will guarantee in the long term the capacity to economically sustain the Basque wellbeing model built up to now for everyone, responding to the needs of a diverse but cohesive society. There is no doubt that the socio-economic development that is proposed will have to be environmentally sustainable or green and will require a citizenry involved at all levels of life; making us an international benchmark, responsibly connected to the outside world and making the Basque Country an attractive place to work and live”.

Extract of the working document 11/12/2021

Figure 3.7 First version developed by researchers



Source: Euskadi 2040 project. Own elaboration

The feedback received to the first academic version of the vision by the policymakers leading the process included the following modifications:

- Adding the time horizon of 2050 for the limitation of the carbon footprint of the region according to EU law and highlighting the orderly and planned nature of the decarbonisation process as a challenge.
- Emphasising as part of an “involved Euskadi”, the existence of rights in citizenship, but also obligations, which transcend the individual level and advocate the collective or common good (for example, in relation to the NIMBY effect, co-responsibility in the care system, sharing of necessary data, etc.).
- Adding a ‘prosperous Euskadi’ as a dimension, understood as a region that is capable of generating income and employment.

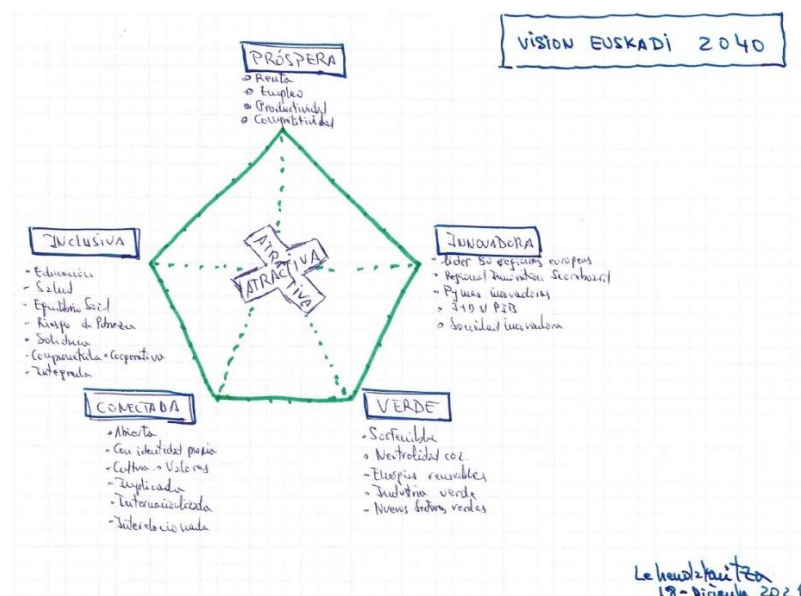
- Highlighting the importance of the unique identity of the Basque Country (language, culture, self-government, economic agreement, its own business models), as an aspect to be preserved also with a view to 2040.
- The dimension of an 'attractive Euskadi' is understood more as a result of all the other elements of the vision than as a dimension on its own.

Second version developed by policymakers

Building on the first version of the vision, policymakers leading the process reacted with a second proposal of the vision, in a style that resembles one "written in a napkin". The main modifications included, in addition to those included above the following:

- The economic pillar bifurcated into two dimensions, on the one hand, a prosperous Euskadi (including economic sustainability), and, on the other hand, an innovative Euskadi, which was considered to have its own entity in the future vision of the territory.
- The social pillar went from a cohesive society to an inclusive society, which initially also included aspects of involvement and commitment (the initial governance dimension).
- It was considered that it was the existence of the other dimensions and characteristics that would make it an attractive territory, so it was moved to the centre of the pentagon in the image.

Figure 3.8 Second version developed by policymakers



Source: Elaborated by the Basque government¹⁴

¹⁴ The figure is kept in the original version in Spanish in order to incorporate the original source and keep fidelity to the process.

The research team agreed and assumed the changes proposed by policymakers, along with sharing the following reflection:

"Understanding that the Vision is predominantly leveraged by you, the government, the only aspect we would like to point out is that we believe the dimension of an "engaged" region has sufficient entity to be included as a dimension on its own (and not within an inclusive or connected region as you propose). This is due to two reasons: first, for the importance of social values to promote a competitiveness for wellbeing model, the fact that social cohesion is a necessary but not sufficient condition for an involved or engaged society, and that an "engaged" dimension would reflect the pursued governance model for the future. Second, for its connection with the rest of the dimensions. An "engaged" Euskadi has as an underlying principle the need to transcend individualism and commit to the common good. This aspect is not only directly related to inclusion or connection but is also central to addressing the rest of the dimensions such as the green transition, productivity (as part of a prosperous Euskadi), or the capacity for innovation from the perspective of demand".

Extract of a letter sent by researcher team to the policymakers leading the initiative on
21/12/2021

The first response given by policymakers stated the following:

"The difficulty lies in translating this philosophy of values into concrete challenges and quantifiable and measurable objectives (which are not strictly qualitative). In this way, we would not have a model that is homogeneous and comparable with other European regional references. Perhaps it would deserve a specific section rather than one of the axes of the vision. Perhaps in this way we would not lose the philosophy of values that would frame everything else. Something to discuss".

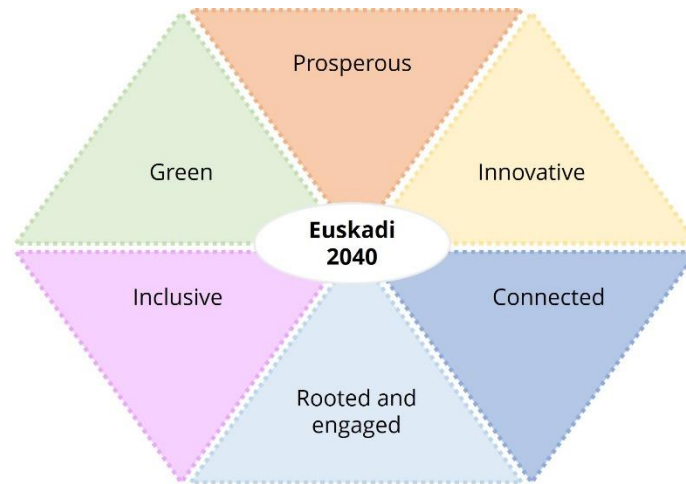
Extract from an email to the research team by one of the policymakers on 22/12/2021

The Basque "hexagon" as the joint proposal for the Vision Euskadi 2040

Following the prior reflections, the project leaders held another meeting, where the first joint proposal for the Vision Euskadi 2040 was co-generated. Two additional modifications were introduced:

- The dimension of attractiveness of the Basque Country was eliminated, since its location in the centre could lead to the understanding that the ultimate aim was to generate an attractive territory, an aspect that did not reflect the desired future.
- Both the research team and policymakers from the government finally agreed that an additional dimension was required, which would reflect an involved, but also rooted Euskadi (in relation to the preservation of its own identity in a globalised world).

Figure 3.9 Leader's first joint proposal for the Vision Euskadi 2040



Source: Euskadi 2040 project. Translated from Basque and Spanish.

Once agreed within the driving group, the first proposal for the Euskadi 2040 Vision and Challenges, together with the diagnostic basis, was compiled in a synthetic document that was shared with the rest of the Basque Government Departments so that they could propose the modifications they considered relevant. It was approved by the Governing Council on 15 February 2022.

3.2.2.2. Multi-level visioning and backcasting

Once the first proposal for the Vision and Challenges of Euskadi 2040 was built within the driving group and shared internally within the government, the next step towards developing a shared vision for the territory was to share the proposal with the multi-level institutions within the region. This included a vision contrasting session at the legislative power in the regional level (a Commission at the Basque Parliament) and a multi-level shared visioning process with the executive powers at the provincial and local levels.

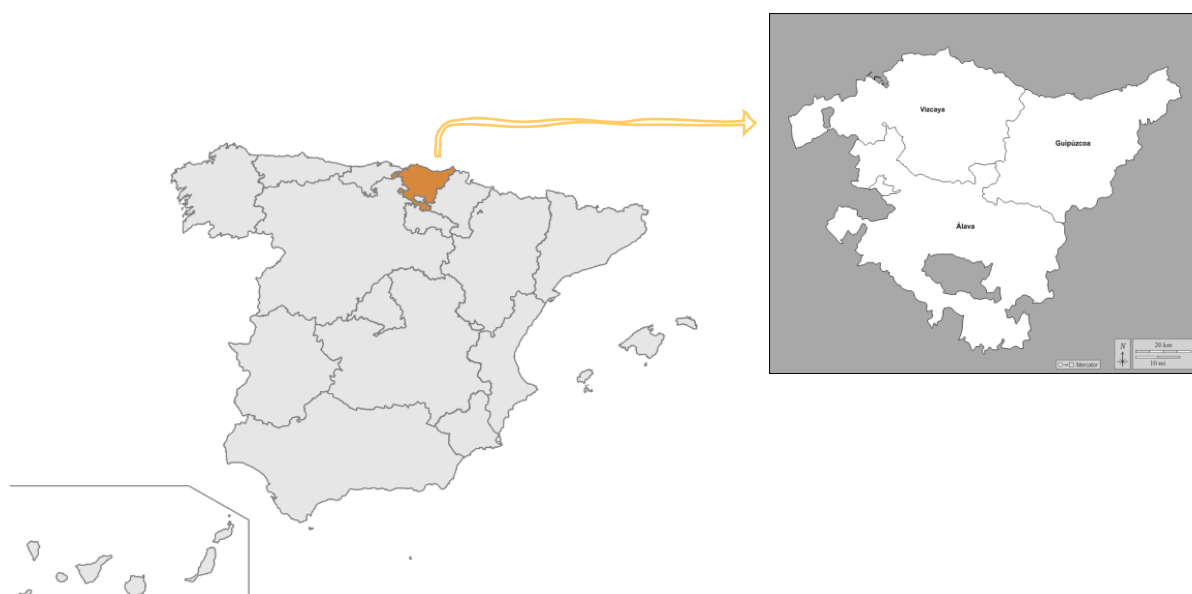
Figure 3.10 Multi-level visioning and backcasting: institutions involved



Source: Own elaboration

The latter multi-level visioning and backcasting process included the three provincial councils of the region (Bizkaia, Gipuzkoa and Araba), and the city councils of the three capital cities in the region (Bilbao, Donostia-San Sebastián and Vitoria-Gasteiz) together with EUDEL (association of Basque municipalities).

Map 3.1 Basque Country map



Source: Own elaboration

The process encompassed different milestones: first, the research team held bilateral meetings with each of the institutions with the aim of understanding the perspective of each subregional institution regarding the vision proposal, and the scope of action where each institution could contribute more actively due to having specific expertise or knowledge. Besides, two interinstitutional sessions were held, chaired by the regional president with a representation of all the subregional institutions. The sessions took place in September 2022 and in January 2024.

Table 3.2 Overview of multi-level sessions with participants

Session	Participants	Dates
Bilateral meetings	- Research team - Institutional leaders and their cabinet, and representatives of the economic promotion department (similar participation scheme to the driving group).	March and April 2022

1st Inter-institutional session	▪ President and presidency ▪ Deputy General of Araba Province ▪ Deputy General of Bizkaia Province ▪ Deputy General of Gipuzkoa Province ▪ Mayor of Bilbao ▪ Mayor of Donostia-San Sebastián ▪ Mayor of Vitoria-Gasteiz and President of EUDEL ▪ Regional Minister for Economic Development, Sustainability and Environment ▪ Research team	September 2022
2nd Inter-institutional session	▪ President and presidency ▪ Deputy General of Araba Province ▪ Deputy General and Deputy of Economic Promotion of Bizkaia Province ▪ Deputy General and Deputy of Economic Promotion of Gipuzkoa Province ▪ Mayor of Bilbao ▪ Mayor of Donostia-San Sebastián ▪ Mayor of Vitoria-Gasteiz ▪ President of EUDEL ▪ Regional Minister for Economic Development, Sustainability and Environment ▪ Research team	January 2024

Source: Own elaboration

Bilateral visioning sessions

On the months of March and April 2022, the research team held six bilateral meetings, one with each subregional institution. Since at that moment, the president of EUDEL coincided with the mayor of one of the capital-cities, he represented both the city itself and the association of municipalities (EUDEL) during the meeting. The objective of the session was to share the Euskadi 2040 Vision and Challenges first proposal and receive feedback to be incorporated to a new version. The enhanced version that was shared by all the institutions would be adopted during the first interinstitutional session. Feedback and suggestions were received both regarding the visioning approach in general (see [Table 3.3](#)) and regarding new or additional competitiveness challenges to be mapped (see [Table 3.4](#)).

Table 3.3 Summary of inputs at bilateral meetings during the multi-level visioning process by contributor regarding the vision in general

Input	Contributor
Need to ensure that the Vision is grounded, achievable and realistic, without maximalist phrases.	Local level (Bilbao)
Importance of not only seeing where you want to go, but also how you want to get there, highlighting the cross-cutting and systemic nature of the vision.	Provincial level (Gipuzkoa)
All levels of government are addressing policies in the different dimensions of the vision, but with different priorities and emphases.	All

Source: Own elaboration

Regarding the specific challenges three types of modifications were suggested: first, the addition of new competitiveness challenges; second, the nuance of the existing competitiveness challenges; and third, the change of location of certain competitiveness challenges from one dimension to another or the organisation of challenges by importance within a dimension.

Table 3.4 Summary of inputs at bilateral meetings during the multi-level visioning process by contributor to the specific challenges

Dimension	Input	Contributor
Prosperous	New challenge: "Boosting productive diversification based on existing capacities by generating new activities and taking advantage of new opportunities arising from the technological-digital (e.g. the Basque Country as a supplier of Industry 4.0), energy-climate (circular economy, bioeconomy, etc.) and socio-demographic (including silver economy) transitions."	Provincial level (Gipuzkoa)
	Moved from "innovative" to "prosperous": "Managing the generational handover and knowledge transfer, both in companies and in the public administration. "	Provincial level (Bizkaia)

	Moved from “connected” and from “green”: “Reducing dependency and promoting strategies to ensure self-sufficiency or self-sourcing (European value chains...) in the fundamental economy (health, care, energy, agri-food sector...).”	Local level (Vitoria-Gasteiz)
	The need to highlight the high dependence of the Basque tax system on a few large companies, and to improve the system for assessing the fiscal return.	Provincial level (Araba and Bizkaia)
Innovative	New challenge: “Strengthening the user and civil society perspective on innovation”	Provincial level (Gipuzkoa)
	New challenge: “Supporting digital transformation and other key technologies (such as artificial intelligence), as cross-cutting elements, to add value to the economy as a whole (in all sectors) and society (bridging the digital divide).”	Provincial level (Bizkaia)
Green	New challenge: “Moving towards the energy mix model of the future to which we aspire, within the margins of European action.”	Local level (Bilbao)
	New challenge: “Continue the progress in the recovery of industrial land and rehabilitate it for use.”	Provincial level (Bizkaia)
	New challenge: “Developing strategies that generate greater certainty in the user's purchasing decisions.”	Local level (Donostia- San Sebastián)
	New challenge: “Further developing mechanisms and instruments such as green taxation to accelerate transition.”	Local level (Vitoria-Gasteiz)
	Importance of considering the impact of the green transition on society.	Local level (Donostia- San Sebastián)
Inclusive	Reformulation of the challenge: “To continue to offer quality public benefits and services associated with welfare (in particular, education, social services, health, housing and guaranteed income) that guarantee equal opportunities and results for all people, seeking a balance in the economic sustainability of the Basque social protection system.”	Local level (Bilbao)

	New challenge: "Adopting a preventive approach in health and social services system".	Local level (Bilbao)
	New challenge: "Particularly addressing the inclusion needs of immigrant groups (including 2nd and 3rd generations)."	Local level (Vitoria-Gasteiz)
	New challenge: "Promote territorial cohesion, rural-urban balance and reactivate the ZAPs (Preferred Action Areas). "	Provincial level (Bizkaia)
	New challenge: "Developing the intergenerational perspective, and cohesion between generations, seeking a better balance of wealth between generations. "	Provincial level (Bizkaia)
	New challenge: "Attending loneliness problems. "	Local level (Bilbao)
	New challenge "Put in place mechanisms to avoid phenomena such as the "ghettoisation" of the immigrant population."	Local level (Donostia- San Sebastián)
Committed	New challenge: "Reinforce the recognition of entrepreneurship, entrepreneurial vocation and critical, open and creative mindset. "	Local level (Donostia- San Sebastián, Vitoria-Gasteiz)
	New challenge: "Strengthening the role of institutions. They should be understood as "allies" or collaborators, not as the solution to all problems and challenges."	Local level (Vitoria-Gasteiz)
	It is essential to work better labour relations for a model of competitiveness for wellbeing, to improve workers' participation generating a common project.	Provincial level (Araba and Gipuzkoa)
Connected	New challenge: "To promote the positioning and active role of the Basque Country in Europe in matters related to the competitiveness and wellbeing of the regions and as an ally in the construction of Europe."	Provincial level (Bizkaia) Local level (Vitoria-Gasteiz)
	New challenge: "Lack of physical and digital connection. "	Local level (Bilbao)

	New challenge: "Continue to strengthen the internal connection of the different actors in the Basque Country. "	Provincial level (Gipuzkoa)
	New challenge: "Develop a strategy with the diaspora and with the Basque Government's external network to address the challenges faced by the Basque Country, such as the challenge of demographic transition by collaborating in talent attraction".	Local level (Donostia- San Sebastián)

Source: Own elaboration

Contrast session at the Basque Parliament

In addition to the multi-level focus on the sub-regional governments, the design of a country vision required its contrast with the rest of the political parties represented in the Basque Parliament. Thus, in this phase, the Euskadi 2040 initiative was presented and contrasted in the Economic Development and Innovation Committee, composed by the members of the different political parties in proportion to their representation in the chamber. The proposal was well received, with those present arguing that they shared the different challenges mentioned and the directionality of the vision, but that the main divergences would come in how to tackle these challenges.

"We share quite a few, if not practically all, of the challenges you mentioned during the session."

Basque Parliament Commission, intervention of the Popular Party. 13/09/2022.

"In general, we are in favour of all the objectives you put forward and I think the process is positive. I don't want to belittle the terms used, because even if they are general, they have a lot of weight behind them (...) at least raising this music is favourable, and what we will ask for is coherence with this. As my grandfather used to say: "do what the priests say, not what the priests do". So, in this case, well, what is said here, at least, I think it can be a shared compass to a certain extent."

Basque Parliament Commission, intervention of EH Bildu. 13/09/2022

First interinstitutional session

On the 15 September 2022, the first interinstitutional session was held, chaired by the regional president. The objective of the session was to adopt the developed proposal of the Euskadi 2040 Vision and Challenges, reflecting on whether all the institutions agreed on the Milestones established (see section 3.2.2.5), and on how could the vision be realised in action. During the session the discussion revolved mainly around two dilemmas or topics.

First, whether all the six dimensions had the same importance for the model of future of the Basque Country, or they should be distinguished either hierarchically, or a distinction between dimensions that are goals in themselves or means for achieving the goals. For instance, certain institutional representatives perceived the dimensions of “innovative” and “committed” as means rather than goals. This connects with Rokeach’s distinction between terminal and instrumental values.

Second, one of the local representatives highlighted the inherent conflict associated with the global nature of the climate change problem. The Basque Country, as a region, has a relatively limited role to play in addressing this issue. Setting ambitious targets could potentially have a detrimental impact on competitiveness. Moreover, it is uncertain whether such targets would yield tangible results, given that the countries with the highest levels of pollution have not yet taken significant measures to mitigate their impact. The stance adopted in the vision is to capitalise on market opportunities linked to the green transition, as reflected in the following intervention:

“Decarbonising means reducing emissions and making what we emit and what we absorb equal. If we start innovating quickly, we will become green and generate new and innovative companies. Vehicle and aeronautical manufacturers are demanding green products (not gas/biogas). Our industry must adapt to the market, and we will be competitive”.

Regional Minister for Economic Development, Sustainability and Environment.

15/09/2022

Second interinstitutional session

On the 17th of January 2024, the second interinstitutional session was held, once the multi-actor visioning process (see 3.2.2.3) had concluded. By the time the session was held, there had been elections at the provincial and local level (spring 2024). For this reason, the principal objective of the session was to reaffirm the Euskadi 2040 new version of Vision and Challenges with the newly elected institutional representatives, together with a focus on bringing the vision to life through present action. Thus, each of the institutions shared whether the Euskadi 2040 Vision was aligned with the goals each established for their new legislature. Different reactions emerged:

“Our governmental programme is born aligned with the work that is under development here.”

Polymaker at the provincial level. 17/01/2024

“On our side, willingness to reach agreements and our willingness to continue reaching them together”

Polymaker at the provincial level. 17/01/2024

“Each city responds to a different logic, and each one will have more or less developed objectives. As I have not been involved in the vision development, I cannot give my opinion on this. I am always willing to collaborate, especially because as a municipality I need inter-institutional collaboration. We will be there as long as it is effective for us.”

Policymaker at the local level. 17/01/2024

Along with reaffirming the Vision, the session also focused on one of the key competitiveness challenges for the future highlighted throughout the entire process: the “war” for talent or skills mismatch. In addition, the research team shared the main learnings from the visioning process, including: the systemic character of the vision, the challenge to implement the vision and the dichotomies that have emerged during the process (polarisation between public and private, competitiveness and wellbeing, and inclusion and the maintenance of local culture, particularly language). The session concluded with an invitation from the Basque Government to the research team to propose a Challenge identified in the Euskadi 2040 visioning process that needed to be tackled collaboratively between the multi-level institutions, for a following interinstitutional session.

3.2.2.3. Multi-actor visioning and backcasting

In addition to the institutional perspective, numerous reflection workshops were organised with local and international agents to contrast and enrich the vision. The process was designed to incorporate the perspectives of various societal groups with potentially divergent interests. These included representatives of workers and employers, the third sector, and particularly the group of young people, whose role is essential for the construction of the future competitiveness model. As for timing, these meetings mainly took place between the two interinstitutional sessions.

The process of multi-actor visioning and backcasting

Local actors

Two approaches were used when involving different local territorial agents:

On the one hand, through direct contact. This method was used both with young people and partially with business representatives, concretely, companies known as hidden champions¹⁵.

- In the case of companies, three workshops were organised, bringing together a total of 10 leading niche companies, in which representatives of the Basque Government also participated. The first of these was aimed at contrasting the Euskadi 2040 Vision; a second session focused on the challenge of attracting and retaining talent, as one of the main challenges identified in the visioning process; and the third, which addressed the challenge of the internationalisation of companies and the changing dynamics of entry barriers into foreign markets.
- A total of seven sessions were conducted with young people, three in universities and four in vocational training centres. 221 students participated in the reflection sessions, offering their insights on the proposed competitiveness for wellbeing of the future of the Basque Country. In order to facilitate comprehension of the diagnosis and content of the Vision among the younger audience, a trivial game was developed by the

¹⁵ We understand hidden champions to be companies that 1) are active in a B2B market; 2) have an annual turnover of < 1 billion; 3) have a flagship product with which it is Top 3 worldwide or No. 1 in Europe; 4) this flagship product provides at least 10 million per year to the company.

researchers and employed during the sessions. It is important to note that the representativity of the group involved in the process of the entire young people as a societal group is limited due to the highly specific profile of young people involved (students) and the high level of heterogeneity within the group. Furthermore, during the sessions, polarised positions were identified with regard to some competitiveness challenges, specifically with regard to maintaining the uniqueness and identity and promoting and supporting the Basque language (for further details, see Izulain Alejos et. al., 2025).

On the other hand, through intermediaries representing the interests of specific groups. Thus, for example, the main trade unions (CCOO, LAB, UGT) and representatives of the Basque business fabric were involved, from the Basque employers' association (Confebask, Adegí and Cebek), to associations of different business legal entities (such as cooperatives or labour companies through ASLE and Konfekoop), or technological parks (Parkea). A contrast was also carried out with the Basque Youth Council, as representatives of the group of young people. The format chosen for these contrasts were bilateral meetings between the research team and the representatives, with no participation of the leading policymakers due to time constraints and to favour freer speech.

International actors

In addition, the initiative was shared in multiple international spaces, for mutual learning between similar experiences (for example, with the Future Generations Commissioner for Wales and her regulations for the Well-being of Future Generations) or the search for synergies with foresight processes underway (for example, Horizon Europe Foresight Network of the European Commission) (Izulain Alejos et al., 2023).

Within Orkestra, the formulation of the Euskadi 2040 Vision and Challenges was shared with its Board of Directors, Advisory Board (made up of international researchers from leading centres such as Harvard Business School, the University of Porto, OECD, or the London School of Economics) and Orkestra's community of ambassadors (composed of leading people in different parts of the world with ties to the Basque Country, to add knowledge and experience to carry out its mission, such as the World Bank, the European Commission, Harvard Kennedy School, or the University of Manchester) (Izulain Alejos et al., 2023).

The results of multi-actor visioning and backcasting

In the pursuit of a unified vision, a synthesis of the inputs from various stakeholders was undertaken. This involved a detailed examination of the Euskadi Vision 2040, encompassing both the amendments to the existing vision and the identification of new competitiveness challenges. This process was conducted in a manner analogous to the multi-level contrast. The contributions were made both to the vision in general (see [Table 3.5](#)) and to specific competitiveness challenges (see [Table 3.6](#)).

Table 3.5 Summary of inputs during multi-actor visioning process by contributor regarding the vision in general

Input	Contributor
Need to make more explicit the various vulnerable groups, mainstream the gender perspective, and use less economic/industrial language if it is a shared vision.	Third sector
Importance of distinguishing between wellbeing and welfare, since in Spanish the same word is used for both concepts.	Business sector
Need to identify what is the distinctive value of the initiative and the process to realise it: aspirational but realistic vision, combining reflection and action, and built collaboratively.	International contrast, Advisory Board
Importance of rethinking the communication of the vision, connecting with current concerns of society and the need to summarise it in a sentence or paragraph that has greater communicative impact.	International contrast, Advisory Board
Importance of including social values as determinants of competitiveness as one of the main challenges to be tackled in Euskadi 2040 together with the shortage of talent.	Management Board

Source: Own elaboration

Table 3.6 Summary of inputs during the multi-actor visioning process by contributor to the specific challenges

Dimension	Input	Contributor
Prosperous	Modification / addition to the challenge: "quality employment encompasses the possibility to learn and grow professionally."	Young people and third sector
	New challenge: "adapt the labour supply to facilitate the use of the full potential of people's capabilities." This reflects two comments: First, the "need to work further develop the purpose of the organisations, to motivate young people to make more effort."	Third sector and business sector

	Second, the recognition of diverse capabilities of people and the need to adapt to them.	
	It is essential to ensure the livelihood of local value chains with high capacity and knowledge.	Business sector (hidden champions)
	The talent shortage is a key challenge now and in the future.	Business sector (all actors)
Innovative	New challenge: "building the strategic capacity of enterprises, in particular SMEs."	Business sector, concretely ASLE and Konfekoop
Inclusive	New challenge: "Generation of safe physical and virtual environments to live in (regardless of gender, neighbourhood, location, nationality, sexual orientation)."	Young people, and third sector representatives
	New challenge: "Lowering the average age and increasing emancipation rates of young people. "	Young people
Committed	Modification of the challenge to include: "Work must be done on worker-employer relations and the construction of a common project throughout the entire economic cycle, not only in crisis situations".	Trade unions

Source: Own elaboration

3.2.2.4. Interdepartmental visioning and backcasting

Concurrently with the multi-agent construction, there was a need to further contrast and enrich the evolved Euskadi 2040 Vision and Challenges with the various Basque Government Departments, after the adoption of the first proposal of the vision by the Governing Council. The initial objective of the contrast sessions was to identify projects or driving initiatives promoted by each department that contributed to the achievement of the vision, with a view to establishing a shared agenda. However, they also contributed to the refinement and nuance of the vision dimensions and challenges.

Contrasting sessions were held with the following Basque Government Departments, selected for their particular impact on the various dimensions of the Vision and their relationship with the thematic of competitiveness for wellbeing:

- Department of Culture
- Department of Economy and Finance
- Department of Education
- Department of Equality, Justice and Social Policies
- Department of Health
- Department of Labour and Employment
- Department of Security
- Presidency - Commissioner for Science, Technology and Innovation (henceforth, STI)
- Presidency - General Secretariat for External Action
- Presidency - General Secretariat for Social Transition and Agenda 2030

The main contributions and points for reflection made by the Departments to the Euskadi 2040 Vision and Challenges are summarised below, following the abovementioned structure of feedback to the Vision in general (see [Table 3.7](#)) and the specific challenges (see [Table 3.8](#)).

Table 3.7 Summary of inputs during interdepartmental visioning process by contributor regarding the vision in general

Input	Contributor
Need to make the scope of the initiative more explicit.	Presidency - Commissioner for STI
Importance of generating an ambitious and inspiring Vision for the mobilisation of the whole territory.	Economy and Treasury
It is of the utmost importance to give due consideration to the demographic challenge, the challenge of talent and the dimension relating to the uniqueness and identity of the Basque Country.	Presidency - General Secretariat for Social Transition and Agenda 2030
Connection with Agenda 2030 and the Sustainable Development Goals; and reflection on the date (2040) of the initiative and its connection with international frameworks.	Presidency - General Secretariat for Social Transition and Agenda 2030
Possibility of incorporating a new dimension around a "capable Basque Country".	Education
Need to check with additional actors in the territory (e.g. Basque Youth Council).	Presidency - General Secretariat for Social Transition and Agenda 2030

Source: Own elaboration

Table 3.8 Summary of inputs during the interdepartamental visioning process by contributor to the specific challenges

Dimension	Input	Contributor
Prosperous	New challenge: "Strategic orientation, both in terms of income (taxation) and expenditure, of the opportunities provided by the Economic Agreement, also generating public awareness of its relevance."	Economy and Treasury
	Nuance of the challenge related to productive diversification: "As the RIS strategy points out, the strategic sectors will be smart industry, cleaner energies and personalised health, and the areas of opportunity will be healthy eating, eco-innovation, sustainable cities and Euskadi Creativa."	Economy and Treasury
	New challenge: "Continuing to foster a strategic partnership between the worlds of education and work for mutual learning and transformation."	Education
	New challenge: "Develop training programmes (both at university, vocational training centres and in training for employment) in collaboration with social and business agents to ensure a match with the professional profiles needed in the market (dual programmes, etc.)."	Education; Work and Employment
Innovative	Modification to an existing challenge: "To promote the generation of scientific and technological capacities and their contribution of added value, leveraging on the existing capacities in the Basque network and aligning them with the challenges of competitiveness at the service of the Basque Country's present and future wellbeing."	Presidency - Commissioner for STI
	New challenge: "Innovation in the design, implementation, evaluation and governance of better public services that meet people's needs."	Security department
Connected	Introduction of the "cultural" aspect in the definition of commitment: "A unique place, which cultivates its	Culture department

	singularities, and has a socially, <i>culturally</i> , politically and entrepreneurially committed society.”	
	Addition to the challenge regarding positioning in Europe: “Promote the positioning and active role of the Basque Country in Europe and its connection with cutting-edge nodes and networks in priority countries.”	General Secretariat for External Action
	Modification to an existing challenge: “the diaspora (both the classic and the more recent diaspora including students and people working abroad).”	General Secretariat for External Action
	Modification to an existing challenge: institutes of research on health included as actors that need to be internationalised	Health department

Source: Own elaboration

3.2.2.5. The outcomes

The following section explores the main outcomes derived from the visioning and backcasting process in Euskadi 2040. The outcomes include the shared vision and challenges (and all the different elements that it includes) along with the monitoring tool that accompanies the shared vision, which aims at tracking progress and making sure the actions undertaken in the present positively affect the Shared vision Euskadi 2040.

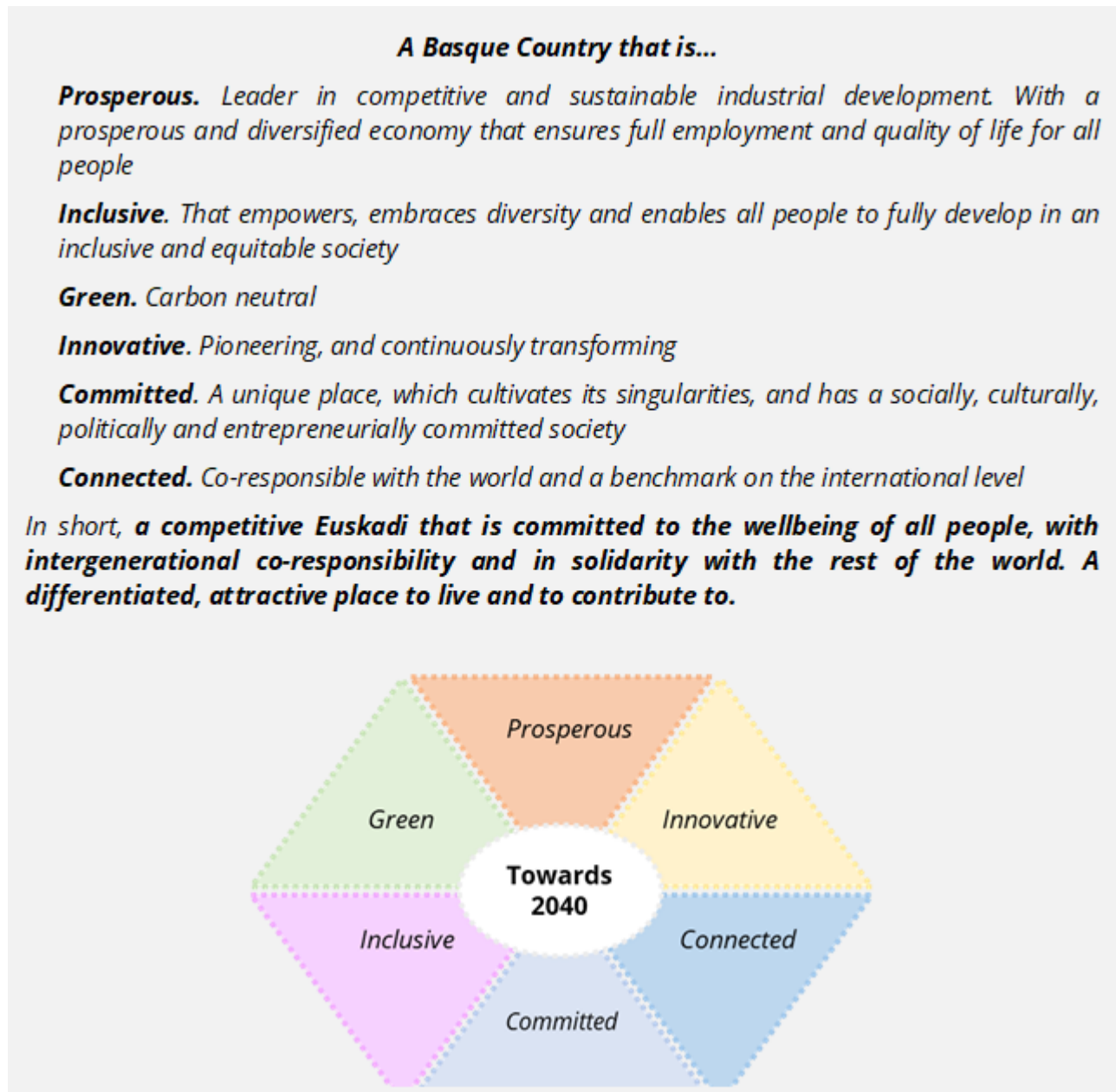
Shared Vision and Challenges

The pursued outcome of the process was the development of a shared vision for the region. The result can be classified as a public policy making vision according to van der Helm (2009, p. 98) standards, since it combines elements of political, business, community and humanistic visions. The shared vision is composed of a series of elements: a vision statement, a vision “philosophy”, six dimensions, and 32 competitiveness challenges (classified into the six dimensions).

Vision statement

The vision statement contains the key definitory elements of the Euskadi 2040 shared vision. Concretely, it is composed of an image (hexagon) containing the six different dimensions and a summary paragraph, with the different claims as they have been envisioned. The vision statement responds to the needs expressed by several participants of the visioning process that expressed the importance of making a vision that is compelling and communicative, in all three visioning processes (multi-level, multi-actor, and interdepartmental). The full statement is available as Appendix V.

Figure 3.11 Euskadi 2040 Vision statement



Source: Izulain Alejos et. al. 2023

Logic behind the shared vision

Following feedback from international actors received during the multi-actor process, the leaders team reflected on what are the distinctive characteristics of the vision. These elements are key definitory characteristics that are essential when understanding how the dimensions are envisioned:

- First, Euskadi 2040 is an **evolutionary** vision, which constructs a future based on the competitiveness strengths in the past, as agreed by the driving group during the development of the first proposal for the vision.
- Second, it is a vision **constructed collaboratively** among different local and international actors, as proved by the participatory process described in 3.2.2.
- Third, Euskadi 2040 is a **systemic** vision. Its dimensions are not projected as watertight compartments, but the impact on one of them also has its effects on other dimensions, similar to trying to solve a face in a "Rubik's Cube". The metaphor was coined by one of the participants in the process representing a trade union. The use of metaphors has been associated with the construction of visions of the future (van der Helm, 2009). The ultimate goal of understanding it as a systemic view is to be aware of the interactions between the various dimensions and to achieve positive interaction and feedback between all dimensions.
- Fourth, the vision is not conceived as a fixed picture, it is understood as an **alive document** that evolves together with the context and circumstances in the rapidly changing environment. The description of the shared visioning and backcasting process (see 3.2.2) is a proof of how the vision and challenges have developed throughout the process.

Vision dimensions

The Euskadi 2040 shared vision projects six adjectives for the competitiveness for wellbeing model of the future. It projects a Basque Country that is prosperous, innovative, green, inclusive, committed and connected. However, those terms can be understood very differently, and a large part of the shared visioning process was to agree on the specific adjectives to be used for each dimension.

For that reason, after each adjective a paragraph describing the sense or meaning of the dimension is included, creating a shared narrative for the future in the form of storytelling. The meaning of the dimension includes references to the competitiveness challenges identified within the dimension, but also adds references to elements of the diagnosis, giving an interpretation of the past towards the future. The vision sense is available in the Appendix V or Vision Statement.

Competitiveness challenges

The initial objective of the project was the identification of the competitiveness challenges for the next generation of the Basque Country. Thus, a process of backcasting was carried out in parallel to the definition of the vision dimensions, in order to map, from the present, what the main problematic elements were towards constructing the preferred future. The challenges embody the actionable character of the vision, since they can be understood as action points for the future.

The resulting list of competitiveness challenges spans to 32 challenges, distributed among the six dimensions. The order of the challenges within each dimension goes from more generic towards more specific. Some of the challenges include up to ten "sub-challenges", that fine tune the general challenges. The complete list of the challenges is included in the Appendix V.

Euskadi 2040 indicators and objectives

Strategic foresight can enrich the entire policy cycle stages, including evaluation and impact assessment (De Vito & Taffoni, 2023). As monitoring tools for the vision achievement, the Euskadi 2040 process has established a series of objectives, with their respective reference indicators and a panel of 39 indicators (included as Appendix VI), which reflect the diversity of thematic areas covered by the competitiveness for wellbeing vision.

The Euskadi 2040 objectives (see [Table 3.9](#)) have a double function, on the one hand, to effectively trace the evolution of the challenges, and on the other hand, to make the vision dimensions more communicative to the wider public via the level of achievement of the goals in the reference indicators.

Both the objectives and the wider panel of indicators have been selected on the basis of five criteria: provenance from official, verifiable and direct sources; manageability and informative nature (no need of additional explanations or technical knowledge of citizens to understand them); comparability with other European regions; diversity of areas reflected in connection with the vision dimensions; the possibility to establish objectives of improvement, both in relation to the own starting point of the region and comparatively to other regions.

Table 3.9 Euskadi 2040 Objectives

SCOPE	OBJECTIVES	REFERENCE INDICATOR
PROSPEROUS	Territory with unemployment below 6%	Unemployment rate (% active population)
	Among the 10% of European regions with the highest per capita incomes	GDP per capita (PPPs)
INCLUSIVE	Among the 10% of European regions with the lowest poverty rate	Risk of poverty and exclusion rate Arope
INNOVATIVE	Leading European region in innovation	Regional Innovation Scoreboard (RIS)
GREEN	Carbon neutral territory	Greenhouse Gas Emissions Index (base year 2005)
COMMITTED	To be achieved through a growing commitment by all to the future of the Basque Country, respecting and supporting its uniqueness, and in a way that is increasingly open and interconnected with the world.	

Source: Izulain Alejos, et. al. (2023)

3.2.3. Shared agenda towards the shared vision

The Shared Vision Euskadi 2040 was developed with a vocation to be implemented and realised, i.e. a vision that inspires action. Thus, with a view to the process of constructing the shared agenda, during the multilevel, multi-agent and interdepartmental processes numerous initiatives and projects that contributed directly to various dimensions and sought to address some of the challenges identified as part of the Euskadi Vision 2040 were collected. All of them of a very heterogeneous nature, leading to an “agenda” that was unmanageable.

The preliminary mapping thus prompted a profound reflection on the merits of designing the shared agenda in this manner, leading to a shift in focus. This new focus regards the Vision as a mirror in which each actor in the territory may see themselves reflected. This reflection is used to define the actions to be carried out from their role and to evaluate the level of contribution to it, whether on an individual or collaborative basis. In this way, the vision would facilitate the articulation and alignment of the agendas of the various actors within the territory, with no need of collecting and structuring action of all actors.

3.2.3.1. Leveraging bets

Throughout the process, a series of driving forces have been identified, understood as initiatives that bring together the following characteristics:

1. Generate transformations that contribute to the development of the different dimensions of the vision of Euskadi 2040 (one or several).
2. Innovative, understanding innovation in a holistic sense.
3. Structural and stable, in the medium or long term, transcending legislatures.
4. Of a certain scale or scalable or replicable in other places.
5. In collaboration between various actors (institutions, public and private agents, etc.).
6. Generate prosperity for the territory in terms of wealth and/or employment.

The following are some examples of this type of leveraging bets to contribute to the vision defined for the construction of the competitiveness model for the well-being of the next generation:

Table 3.10 Examples of leveraging bets of Euskadi 2040

Leveraging bet	Brief description of the bet	Principal dimension addresses
<i>Electric, autonomous, connected and shared vehicles</i>	Collaborative development of R&D, capabilities and new business models in sustainable mobility.	Prosperous, green and innovative

<i>Talent and values</i>	Multi-level, cross-departmental and multi-stakeholder collaboration to generate, attract and retain the necessary talent and drive values of engagement at work.	Prosperous, committed and inclusive
<i>Industry 4.0</i>	Promoting smart factories and new business models based on digital transformation and servitisation.	Prosperous and innovative
<i>Hydrogen economy</i>	Basque Hydrogen Corridor-BH2C: Creation of the hydrogen ecosystem to advance decarbonisation, address the storage challenge, and use the hydrogen economy to drive industry and technology.	Green, connected, innovative and prosperous
<i>Solid state batteries</i>	Basquevolt: to complete the electric vehicle value chain in Spain by manufacturing solid-state batteries in the territory of Alava, contributing to reaching 25% of the European market share in batteries worldwide by 2028.	Green, innovative and prosperous
<i>Social and health care system</i>	Promote integrated social and health care in the care of people through collaboration between social and health agents.	Inclusive
<i>Atlantic Arc</i>	Collaboration between the Atlantic Arc regions to improve connectivity and leverage in Europe and work on collaborative projects to improve innovation and competitiveness of the Atlantic Arc regions.	Connected, green and prosperous

Source: Izulain Alejos et. al. 2023

The Euskadi 2040 shared agenda is, therefore, made up of both the structural leveraging bets and the rest of the actions and initiatives that the various territorial agents set in motion that contribute to competitiveness for the wellbeing of the territory, in line with the Vision.

3.2.3.2. Multi-level alignment with the Euskadi 2040 Shared Vision

As explained during the multi-level visioning and backcasting process, while the project Euskadi 2040 was ongoing local and provincial elections took place, leading to changes in certain subregional governments while other political representatives remained. In all cases, once the new teams joined office new strategic or mandate plans had to be launched. In that process,

two of the multi-level institutions adopted the Euskadi 2040 shared vision as a reflexion framework, at their own initiative¹⁶, the Provincial Councils of Bizkaia and Gipuzkoa.

The approach taken in each case was distinct. In one of the cases, the Provincial Council of Gipuzkoa, the research team responsible for facilitating the Euskadi 2040 process was invited to present the vision and engage in reflection alongside those tasked with developing the new mandate plan. In the subsequent case, the Provincial Council of Bizkaia adopted the Vision as a framework on its own right, explicitly reflecting the contribution to the Vision in its Mandate Plan for the period 2023-2027. This was articulated in the second of the inter-institutional sessions (see page 132). The alignment of the provincial government in Bizkaia is clearly visible in the different dimensions that they establish, which connect directly with the Euskadi 2040 Vision dimensions (see [Figure 3.12](#)).

Figure 3.12 Provincial government Mandate plan dimensions alignment with Euskadi 2040



*Note: Own translation. Original in Spanish
Source: Izulain (2025, forthcoming)*

¹⁶ The aim of this section is not to analyse the content of the mandate plans, nor the extent to which they are or are not in line with the vision. For this reason, only the experiences of those actors who have explicitly referred to the Euskadi 2040 initiative in the development of their mandate plans, or who have reached out to the research team to have used it as a tool for reflection are mentioned. This does not exclude the possibility that other initiatives may have been aligned with the Euskadi 2040 vision.

3.3. Key experiential learnings

Following the description of the process, we will proceed to elucidate some of the principal insights derived therefrom, with a view to the elaboration of the conceptual-analytical framework that will be subsequently developed in the following chapter.

As detailed in the methodological chapter (see 1.2.1), these insights emerge from a macro- and meso-scale view of the process. In other words, the learnings resulting from being an internal participant in the process (macro scale) and a reflexive participant (meso level). However, the excrutinised analysis of the concrete social values expressed in the process by different participants is left for the analysis chapter, where the framework will be tested.

The following [Table 3.11](#) shows the key learnings extracted from the process and are accompanied by the specific process-based evidence that supports them, ensuring traceability. This approach allows for a clear determination of how the framework has been developed and the knowledge it incorporates, as well as the sources from which it was derived.

Table 3.11 Evidence-based key learnings

Key learnings	Process evidence
Key experiential learning 1 The difficulty of measuring social values is a barrier to include value-related dimensions and challenges as part of the vision for the future. In this case, despite the difficulty, it has been included due to the high awareness of the importance of social values for developing the competitiveness for wellbeing model.	The difficulty is explicitly mentioned by governmental actors in the development of the first proposal for the vision (see page 121) and also during the multi-level visioning process (see 3.2.2.2).
Key experiential learning 2 The driving group or leadership of the initiative had a prominent role including, the process and methodological design, in the selection of participating actors, and in the content that was in the last instance included in the resulting vision outcome...	The participation and roles of the leadership or driving group are described in the sections project leadership (see 3.1.1) and project leader's first visioning and backcasting proposal (see 3.2.2.1). However, the functions performed are wide, and there are referenced to all throughout the process description.

Key experiential learning 3 Participants have taken part either as individuals or as representatives of diverse collective entities or sectors of the society, in order to guarantee a representativity of different territorial interests	As described in the multi-actor visioning and backcasting section (see 3.2.2.3), young people have taken part on their own behalf, whereas other participants have been involved representing their organisations as territorial actors (e.g. trade unions, business associations, third sector association).
Key experiential learning 4 Participants identify the need not only to discuss the content of the vision, but also, refer to aspects related to how the vision should be constructed (the visioning process), and how they understand their desired vision outcome looks like.	Most participants see the necessity for a vision to be easily communicative and ambitious. This aspect has been expressed by all actors involved in the process, including international agents (see Table 3.5), governmental departments (see Table 3.6) and local actors. There has been a need to utilise tools such as metaphors and games in order to transmit certain complex concepts (e.g. the systemic character of the vision) and also images and indicators to facilitate understanding. In particular, the Rubik's cube metaphor proposed by one of the unions (see 3.2.2.5) and the quiz game developed by the research team to help young people understand contrasts (see 3.2.2.3) stand out.
Key experiential learning 5 The visioning process has been valuable to identify shared values and visions in the territory among different actors. However, it has also made latent the existing discrepancies, and in some cases, the polarised positions. The presences and the absences in the participant list are also an important learning to assess the feasibility or level of resistance to the implementation of the vision.	During the contrast sessions with young people, polarised positions were identified regarding the desirability of mandatory nature of the Basque language (see page 133). In addition, a dilemma regarding the collide between prosperous and green dimensions were debated during the first interinstitutional session (see page 131). Lastly, another highly mentioned challenge identified during the process is the war for talent. Diverging perspectives have emerged

	regarding this challenge, particularly between the business sector and companies, trade unions and young people. Even within the different sectors, there are diverging narratives. (see 3.2.2.2, 3.2.2.3, 3.2.2.4 and 3.2.3.1)
Key experiential learning 6 A distinction between vision and action is made, highlighting the importance of the coherence among the two.	Two aspects of the process evidence this learning: On the one hand, the process distinguishes the vision development process (see 3.2.2) and the shared agenda (see 3.2.3). On the other hand, the objective of the research team was to develop an actionable vision. Consequently, from the outset, an attempt was made to map the desirable vision in conjunction with the actions/projects that were already underway, particularly in the Basque institutions. However, the efforts of developing a mapping were not fructiferous and a softer (less formal) approach to action had to be undertaken (see 3.2.3).

Source: Own elaboration

3.4. In short

Euskadi 2040 is an initiative launched in July 2021 by the Basque Government (Presidency and Economic Development, Sustainability and Environment Department) in collaboration with the research institution Orkestra, that has collaboratively constructed a shared vision for the future competitiveness for the wellbeing model of the region towards 2040. In addition to the vision, 32 competitiveness challenges have been identified and a list of 39 indicators for the monitoring of the level of achievement of the vision.

The process of developing the vision has been conducted in a series of phases. In the initial stage, a diagnosis was conducted to identify the fundamental factors that contributed to the region's past competitive advantage, its current competitive position, and an evaluation of future trends and their potential impact on the region. Subsequently, a vision proposal was formulated by the initiative's driving group, which was then subjected to a multilevel, multi-stakeholder (local and international) and interdepartmental critique and enhancement. Finally, efforts were made to reflect on how the vision could be translated into action through a shared agenda development process.

Six key learnings are extracted from the process, which will support the elaboration of the conceptual-analytical framework, on the next chapter of the dissertation:

1. The difficulty of measuring social values is a barrier to include value-related dimensions as part of the vision.
2. The leadership group of vision development process has a prominent role.
3. Visioning participants have taken part as individuals or as representatives of organisations.
4. As well as the vision content, the visioning process and the format of the outcome are relevant for participants.
5. In addition to identifying shared values, the visioning process also allows the identification of polarised positions and contrary values.
6. Despite emphasising the actionability of the vision, a distinction can be made between the vision and action.

Chapter IV

Conceptual-analytical framework

The present chapter will propose a conceptual and analytical framework that aims at responding to the research question regarding the ways in which social values influence shared visioning processes in the competitiveness for wellbeing field. The result is derived from both, the theoretical review presented in [Chapter II](#), and some preliminary conclusions extracted from the case study presented in [Chapter III](#). Concretely, when key experiential learnings are employed, a reference is made, for traceability. The combination of the theoretical and experiential learnings aims at a more actionable conceptual framework that can feed both processes analytically and contribute to the frontier of academic knowledge.

4.1. Rationale for the framework

The literature that intersects social values and futures domain is clear about the fact that social values influence (particularly normative) foresight processes (R. Amara, 1991; Kuosa, 2011; E. Masini, 2006) and argue for the importance of explicitness of values as an ethical good practice for the field (R. Amara, 1991; W. Bell, 2017). However, it remains unclear what values need to be explicated, and at which elements of the process do they influence. Following what Sen (2004) argues for the interconnection of culture and development, rather than whether, what matters is how values are relevantly impacting visioning exercises. This represents a gap in the existing literature, which the present dissertation seeks to address. In addition, the present work will employ EVS data (based on Inglehart's framework) to further dig into the futures domain, aspect that has been only limitedly explored (Paulson & Büchs, 2022).

Two different but connected functions can be observed for the conceptual-analytical framework presented below:

- Ex-ante function: The framework can be used before embarking on a visioning exercise to understand the starting point of the process and to make transparent the social values that underpin or will underpin the initiative.
- Ex-post function: The framework can be employed at the conclusion of the normative foresight exercise to evaluate the influence of these values (including who's values) on the process and the resulting vision.

Three main ideas or concepts are presented as part of the conceptual-analytical framework of this dissertation. The concepts are introduced here in a headline form and elaborated further (both in written and visualised) in the next section of the chapter:

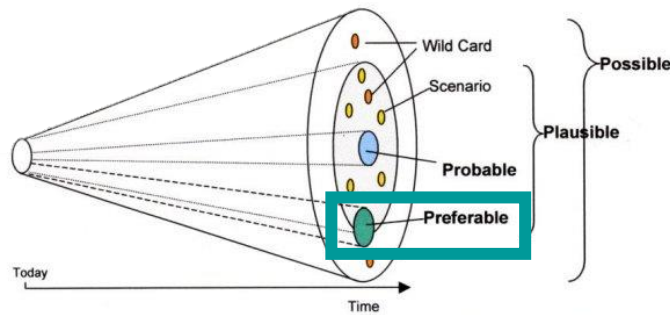
- First, there are multiple futures, and it must be highlighted that there are also multiple preferable futures. The identification of values and value distributions within a given territory can prove beneficial in establishing the boundaries of preferable futures and the prerequisites for the development of a shared vision.
- Secondly, it is not sufficient to consider only the level of values (national, organisational or individual) when evaluating their impact in a foresight process. In addition to the aforementioned level, an analysis of the role played by the subject holding the values in the process is of significant importance, as it incorporates an examination of power dynamics.
- Thirdly, with regard to the significance of values and their influence on foresight processes, it is possible to identify three distinct stages and corresponding value categories: the visioning values, the vision values and the vision-action values.

4.2. Values as limits of normative foresight

The paradigm shift within the futures domain has emphasised the pluralistic and multiple character of "the" future. As the theoretical review of this dissertation mentioned one of the most predominant tools to visualise the multiplicity of futures is the Futures cone (Voros, 2022) which reflects the diverse typologies of futures (possible, plausible, probable, preferable...) depending on the version. It is accurate to conclude that the image in question reflects the

various typologies in a single representation in a very successful way. However, it may not fully capture the notion that there are multiple preferable futures within a given territory, and therefore, multiple visions for the future of the territory can emerge.

Figure 4.1 Futures cone (Voros, 2022)



Source: Voros (2022)

Zooming in the different existing preferable or desirable futures, it is possible to identify a number of narratives that exert varying degrees of influence, some representing the views of minority groups and others those of the majority. Pfau-Effinger (2005) refers to them as discourses on cultural values and ideals on the topic of welfare states. These can be observed in both academic and political contexts. In the competitiveness for wellbeing domain, some majoritarian narratives can also be considered to be the “official visions” for the future, as they establish the type of development to be followed, particularly due to the climate emergency. There are both non-binding examples (for instance, the sustainable development goals of the UN), and binding examples or norms (for instance, the Green Deal normative package and the EU commitment of an economy with net-zero emissions by 2050). Those pre-existing normative futures have an influence on visioning exercises.

As viewed in the experience described in the present dissertation and pointed out also by literature (Mills & Wilner, 2023), the process of constructing a shared vision for the territory allows to identify the common values shared in a society. On the other side of the same coin, it also allows the identification of approaches, or topics where the society shows higher polarisation, as detected in the case study (*Key experiential learning 5*).

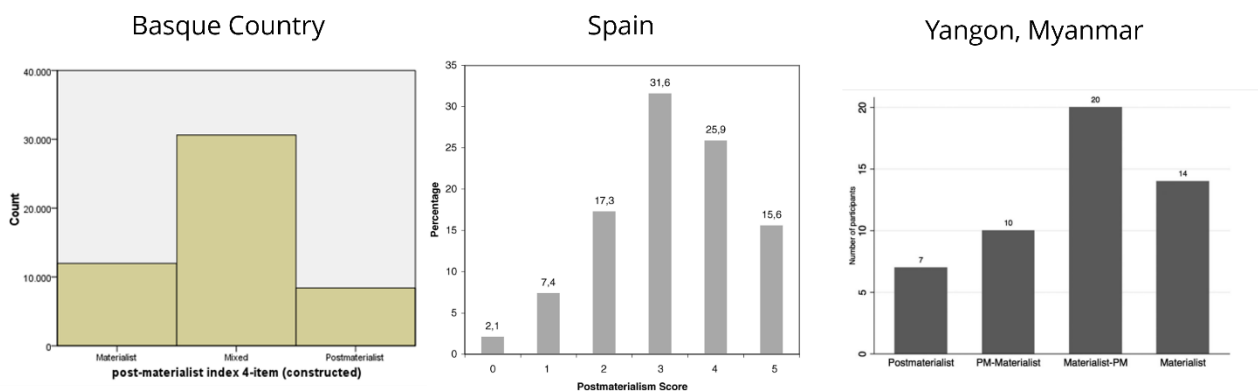
The motivation to work on a shared vision includes several reasons, such as, the increase in subjective wellbeing of individuals along with a higher likelihood of realisation of the projected preferable future. Indeed, following value congruity theory (M. de los Á. Bilbao et al., 2007; Sagiv & Schwartz, 2000), if an individual shares the values of the society or territory, their subjective wellbeing increases. In addition, and despite acknowledging there can be other factors (environmental and circumstantial) that influence behaviour (Rohan, 2000; Sen, 2004), also denominated as the value-action gap (Portus et al., 2024), values are “characteristics of human action”, and therefore they influence behaviour. The more people share the values present in the vision, the more likely they will act in favour of constructing the preferable future (shared

vision) defined. Since, in the end, in regions no actor has the power to determine the decisions of other actors (J. Karlsen & Larrea, 2014). In short, if an actor shares the vision, it might (depending on the circumstances) act in concordance with it. If the actor does not share the vision, highly unlikely it will proactively act according to it.

One of the key characteristics of values is that (see 2.1.2) they have dual character. This is exemplified by the value-frameworks developed by the main authors in the values-domain (e.g., collectivism and individualism of Hofstede, materialism and postmaterialist index of Inglehart or the self-enhancement and the self-transcendence dilemma of Schwartz). In other words, there are two opposing extremes or limits that correspond to the same value. These limits are also conceptually equivalent to the limits of the preferable, and if we apply it to the futures domain, the different poles of specific values can act as limits to the preferable futures, establishing how wide the preferable's "cone" is, or its level of spread.

In addition to the aforementioned limits of values, it is also imperative to gain insight into the distribution of these values within society, with a particular focus on whether they are distributed equally or unequally. From a quantitative perspective, taking the example of the postmaterialist index by Inglehart, we can observe that most territories show a "normal" distribution, including the Basque Country (Silvestre et al., 2024), meaning most people show a mixed position, although slightly higher materialist values. Three examples from different studies are provided below (see Figure 4.2).

Figure 4.2 Examples of distribution of the postmaterialist index



Source: From left to right: Own elaboration, based on EVS data; (Águila et al., 2008; Buschmann, 2019)

The application of statistical data, including measures such as the mean, variance and deviation, can facilitate an understanding of the distribution of values around a given theme. Furthermore, it can assist in gauging the ease or difficulty of achieving a shared vision, and which vision that is. A very low deviation represents a more straightforward starting point for the visioning process, as most societal values are already aligned, easing the development of a shared vision for the future. This would mean that individual values are highly congruent (M. de los Á. Bilbao et al., 2007; Sagiv & Schwartz, 2000) with those predominant in a society. As the

deviation increases, so too do the difficulties, since grouping majorities around specific values is more complex, and therefore, greater resistances, particularly in action, are more likely.

Figure 4.3 Shared vision value-distribution types



Shared vision enabling value-distributions

Shared vision disabling value-distributions

Source: Own elaboration

It is important to note here that a significant proportion of value studies employ quantitative methods. However, qualitative methods have also been valuable tools in order to understand the value-dynamics in a territory (Espedal et al., 2022b), even further when addressing the value-dynamics in a process (shared vision development process). Despite some of the analytical factors mentioned above are more straightforward in quantitative analysis (Emory, n.d.), they can also be assessed via qualitative methods. Its translation or equivalence is presented in the following table:

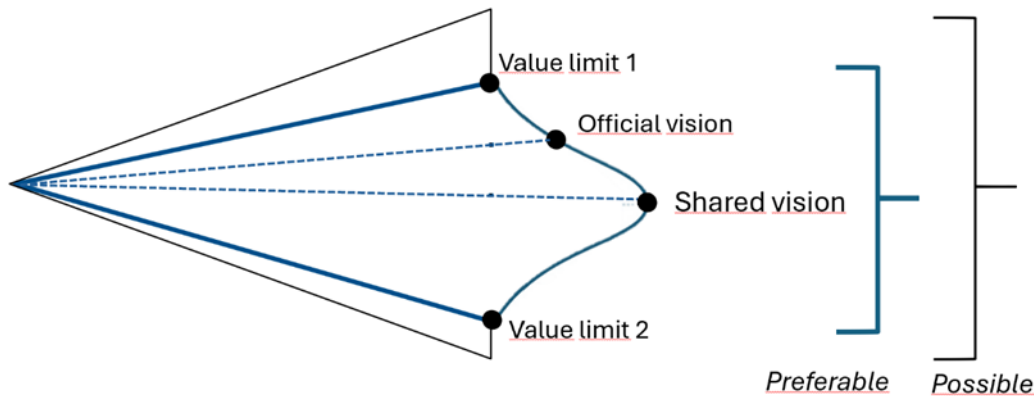
Table 4.1 Analytical factors by type of method

Concept	Analysis factors	Quantitative focus	Qualitative focus
Shared vision	Centre point	Mean	Mostly shared position
Limits of the preferable	Spread	Minimum and maximum (forming the span), and standard deviation	Identification of polarised positions
Enabling or disabling environment	Shape of the distribution	Histogram for visualisation and comparison towards normal distribution	Level of homogeneity of interventions

Source: Own elaboration

The merging of the abovementioned concepts of the Future's Cone (Voros, 2023) and the conceptual and statistical visualisation¹⁷ of value-distribution, results in the following conceptualisation:

Figure 4.4 Visualisation of value distributions in the Future Cone



Source: Own elaboration, building on the Future Cone (Voros, 2023) and normal distribution

The objective of the framework is to visualise the multiplicity of preferable futures, and the connection between social values and normative futures. If available, an ex-ante analysis of the values connected with the thematic focus of the normative foresight exercise offers an understanding of what the starting point for the visioning process is, whether the community context is enabling or disabling. In the absence of such data, or following a complementarity logic, the visioning process itself can provide insights into the degree of existing homogeneity or heterogeneity in the distribution of values connected to the vision theme. This contribution allows not only the measurement of social values (*Key experiential learning 1*), but it provides an optic to better understand the implications in terms of visioning of that measurement.

¹⁷ A quantitative approach is adopted here, since it facilitates visual representation.

4.3. From a level-based paradigm into a level and role-based paradigm in the value holding subjects

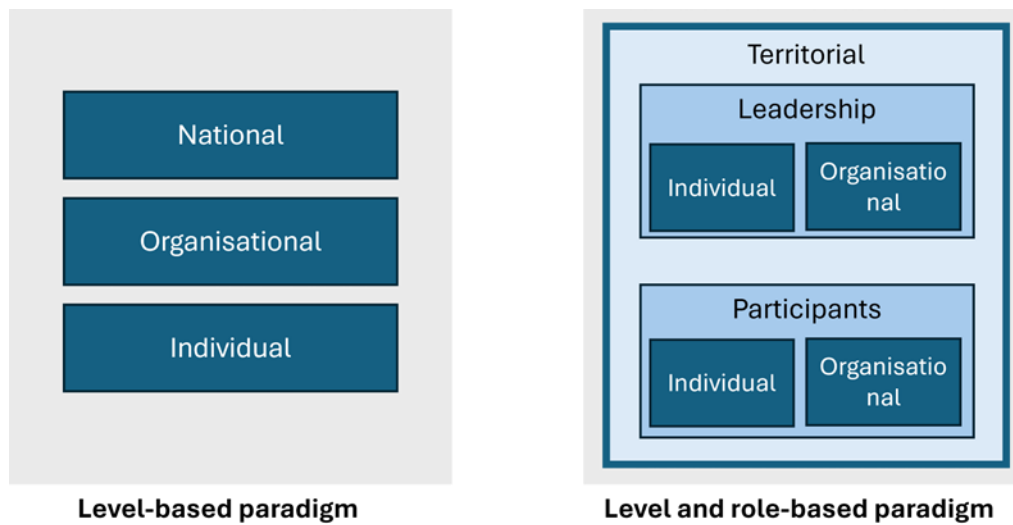
Having a look at the definitions of values, most authors assign values to an individual or a group (Kluckhohn, 1951) or refer to values as individually or socially preferred states (Rokeach, 1973) (see [Table 2.1](#) for all definitions). Therefore, values should not (or cannot) be disassociated from the subject who 'owns' them, either individual or collective.

The most comprehensive piece within the literature that intersects values and foresight processes focuses on the three existing levels for values (national, organisational and individual), when analysing the "cultural readiness" for foresight (Panizzon & Barcellos, 2019). This dissertation contributes to the existing framework twofold:

- On the one hand, by suggesting the term **"territorial" instead of "national" level**. The current term fails to consider the diversity of spaces where foresight processes can be held. The concept "territorial" (also applied to foresight) is wider, and encompasses the sub-national levels that are more predominantly also playing an important role in the futures domain (Committee of the Regions. et al., 2011; Fernández Güell, 2012; Vargas-Lama & Osorio-Vera, 2020). Similarly, social values are also being measured not only at the country level, but also from a regional perspective, where place-based dynamics can better be observed (*Participating Countries*, 2018). Consequently, the term "territorial" would be more accurately responding to the different potential casuistries.
- On the other hand, by introducing not only the variable of the level of values, but also **the role that the subjects that "own" the values play within the foresight process**, be it a leadership role or a participant role. The values of the process leaders have a high and direct impact on the theme, the method and participant selection (*Key experiential learning 2*). Leadership can be formed by the research or policymaker group in charge of the foresight exercise, together with the sponsors (Keenan & Popper, 2008b). Participants' values are expected to be reflected in the resulting vision statement. Both leaders and individuals can take part in the process as individuals or as representatives of the interests of an organisation and/or territorial actor (*Key experiential learning 3*), reflecting the level of values they embody (either individual or organisational). The relevant aspect is including not the highest number of participants in the process, but those that represent different existing interests in the society (Larrea, 2021) in order to be able to have a quality conversation and negotiate (Dixon et al., 2022; C. Francis, 2019; Uranga, 2007; Wilkinson, 2017). Therefore, the level of representativity of participants of the entire territory is also an important analytical factor, which helps assess the quality of the analysis.

Thus, I propose a revision of the variables on which the focus is placed when assessing the impact of values on foresight processes, to include, in addition to level of values, the role that subjects or communities holding those values play in the processes. I propose a change of paradigm (see [Figure 4.5](#)) due to the reason that failure to observe the role variable in the process may lead to failure to observe the power dynamics within the processes. Similarly to the frameworks proposed by Panizzon & Barcellos (2019) this conceptual-analytical framework could be employed for an ex-ante and/or ex-post evaluation or analysis of values.

Figure 4.5 Level and role-based paradigm visualisation

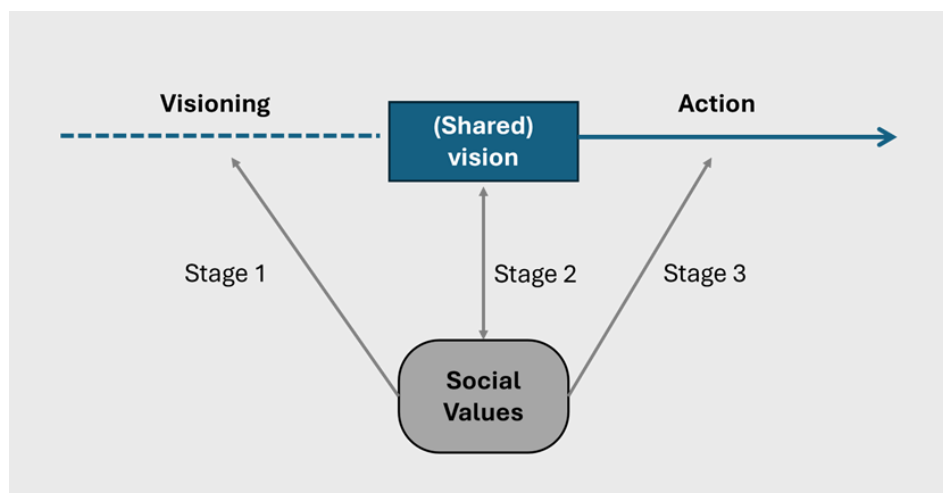


Source: Own elaboration

4.4. Three stages in how values influence normative foresight processes

After having established that values act as limits for normative foresight, and the importance of analysing both the level and role of the subjects holding the values, we will now proceed to the conceptual-analytical framework responding to the central research question of the present dissertation: in which way social values influence shared visioning processes in the competitiveness for wellbeing domain.

Figure 4.6 Three stages of the ways social values influence normative foresight



Source: Own elaboration

As reflected in the conceptual framework (Figure 4.6), three different stages can be distinguished in the connection between social values and shared vision development processes, concretely, visioning processes, the vision outcome and action (*Key experiential learnings 4 and 6*). For a proper interpretation of the framework two disclaimers need to be made:

On the one hand, the concept of shared vision already encompasses both visioning and action. Indeed, a shared vision is characterised as action-oriented and imagined collaboratively. However, the stages are differentiated in order to distinguish the various internal processes that are involved in the development of a vision. I.e. the three identified stages and their respective categories are considered to be “artefacts” that facilitate a more profound comprehension of the internal process dynamics in reality and the power relations that underpin ambitious processes, such as the generation of shared visions.

On the other hand, the process is depicted in a linear way in order to ease understanding, however, in reality, these processes should follow a cyclical logic, since action changes reality, and also circumstances change; therefore, the vision should be revisited in view of changes in the present.

The explicit delineation of the way values influence the vision development process allows for a categorisation of values according to the stage of the process where they have an impact. They are not all-encompassing categories; instead, the framework developed is a tool that researchers can employ to better understand the intersection among values and futures domain. It is an additional framework to be added to the toolbox for values analysis (Tuleja & Schachner, 2020).

The following section will provide a more detailed examination of the three stages, with a particular focus on the following aspects: the value uncertainties they address (Möller, 2016), the direct or indirect role of values (Douglas, 2009; Shala, 2018), together with providing examples of social values falling into each category. It must be mentioned that the categories are not mutually exclusive, meaning certain values can fall into different categories as they impact different stages.

Stage 1: Visioning values

Visioning values are the social values that impact the (shared) vision development process. Overall culture or values of a society/territory can be reflected in whether they are more likely or less likely to approach a foresight exercise, and what type of foresight exercise they are more likely to pursue (Andersen & Rasmussen, 2014; Keenan & Popper, 2008b; Panizzon & Barcellos, 2019).

Similarly, a direct role of social values is recognised in determining thematic focus (Douglas, 2009; Keenan & Popper, 2008a; Saritas, 2013; Shala, 2018), method (Andersen & Rasmussen, 2014; Douglas, 2009; Keenan & Popper, 2008a; Shala, 2018), and degree of participation (Andersen & Rasmussen, 2014; Keenan & Popper, 2008a), all elements connected to the visioning process, that can be categorised as visioning values.

Hofstede's framework has been employed several times as an attempt to measure the territorial differences in this matter, particularly the values of power distance and uncertainty avoidance (Andersen & Rasmussen, 2014; Panizzon & Barcellos, 2019). Other values such as the freedom of choice or locus of control (i.e. the degree on which people feel they have completely free choice and control over their lives, or what they do has no real effect on what happens to them), can also be expected to have an impact on pursuing or not normative foresight exercises, and are examples of visioning values. Ultimately, if individuals perceive that their actions have no impact, they are unlikely to devote time and effort to articulating a vision of a preferable future and to act towards its achievement.

Regarding the subject that holds visioning values, the leadership role is particularly important in the first stage, since leaders are oftentimes the decision-makers when it comes to procedural aspects of foresight exercises, such as the method used, or the level of participation to which the process is subjected to, even which territorial actors are invited to participate (*Key experiential learning 2*).

Stage 2: Vision values

Vision values are the social values that impact the resulting (shared) vision of the visioning process. It is worthy of note that between social values and the (shared) vision there is a mutual influence, since social values impact the vision, and the vision can also influence (and even modify) societal values via the visioning process (Panizzon & Barcellos, 2019). As for the value uncertainties (Möller, 2016) that a vision solves, we need to highlight, first, the uncertainty regarding which values are supported for the future, and second, the specific content that those values have.

Vision values depend highly on the theme chosen for the foresight process. For instance, when developing a long-term vision for the competitiveness for wellbeing model of a territory, social values such as Inglehart's post-materialism index, the aspects that a society should provide, the values that want to be transmitted to future generations, among others, can be considered vision value examples.

Regarding the subjects holding vision values, although the leader's role is of continuing significance, the values of the participants, and more concretely, those values shared by a majority of participants are expected to be reflected in the outcome of the shared vision, as representatives of a wider community. As Harmáčková et. al. (2023) suggest, an explanation or analysis of participant's values would be essential to assess who's values have been more extensively incorporated into the outcome and which have been overlooked. Therefore, an ex-post evaluation could help assess the quality of the shared vision, and whether the outcome is really co-created or merely co-produced.

Stage 3: Vision-action values

A vision is per definition action oriented. Nevertheless, one of the characteristics that distinguishes visioning and foresight processes from planning, is it's not so detailed nature. This gives the vision transituational capacity (similarly to values), but can create tensions when approaching action, since it might or might not respond sufficiently to the remaining two value uncertainties (Möller, 2016): which values apply to an specific situation, and how to weight different values. Vision-action values are the values that influence whether and, in case, how the vision is taken into action.

Values have a role when weighting different alternatives (and prioritising), when there are no win-win situations and one decision compromises other dimensions, this means, there is usually a hierarchy in values (Frondizi, 1956; Jacoby, 2006; Schwartz, 2006). A (shared) vision can in itself explicitly define the criteria for prioritisation among different value dimensions or remain with a certain value ambivalence (Jacoby, 2006), leaving room for the territorial actors (with their values) to decide. An example of vision-action values can be, for instance, in the competitiveness for wellbeing domain, the prioritisation between economic growth and environmentalism.

Regarding the vision-action values, not only those involved in the process will be important, but rather all the community targeted (Keenan & Popper, 2008a) by the vision, who has a role in taking it into action.

4.5. Influence of social values in shared visioning: a conceptual-analytical framework

The following table provides a summary of the content connecting the three above-described contributions and constitutes the conceptual-analytical framework for understanding the ways in which social values influence shared visioning processes in the competitiveness for wellbeing field. It delves into the procedural moments in which values have an influence, the subject that 'owns' the values, its level and the role it plays in the process, and the lens through which each of the value-categories' (depending on the stage of the process) analysis should be conducted.

Table 4.2 Conceptual-analytical framework

Categories	Definition	Level & role	Analysis factors
Stage 1: Visioning values	Normative foresight process related social values, regarding: ▪ Method ▪ Participation	Predominantly marked by <u>leadership values</u> (both individual and organisational)	▪ <i>Centre point</i> or positioning, in order to check where the shared vision could be positioned
Stage 2: Vision values	Social values associated with the content of the vision. Thematically dependant. ▪ Which social values are preferable towards the future ▪ How are those preferable social values defined, which is their content	Predominantly marked by <u>participants' values</u> (both individual and organisational) Leadership values can also influence, when leaders' take part in the vision content-development	▪ <i>Spread of values</i> or polarised positions for its connection with values as limits of preferable futures ▪ <i>Distribution of values</i> or level of homogeneity of interventions in order to see whether it is enabling or disabling shared vision
Stage 3: Vision- action values	The social values that influence if, how and whether the vision is taken into action: ▪ What specific values apply to a situation ▪ Which value is preferable over another in a given situation	Predominantly marked by <u>territorial values</u> , since a territorial vision does not only apply to the group (leaders and participants) that have co-created it. Its realisation depends on the wider community.	▪ <i>Level of representativity</i> of analysed values with respect to the territory to ensure quality

Source: Own elaboration

Chapter V

Analysis and contrast of the conceptual-analytical framework

After this conceptual-analytical framework has been established, this chapter pursues two main objectives:

On the one hand, to analyse the evolution of social values in the Basque Country, influencing shared vision on competitiveness for wellbeing (i.e. Specific Objective 2). The framework will be employed as the analytical lens for this purpose. Emphasis will be set on testing the four hypotheses:

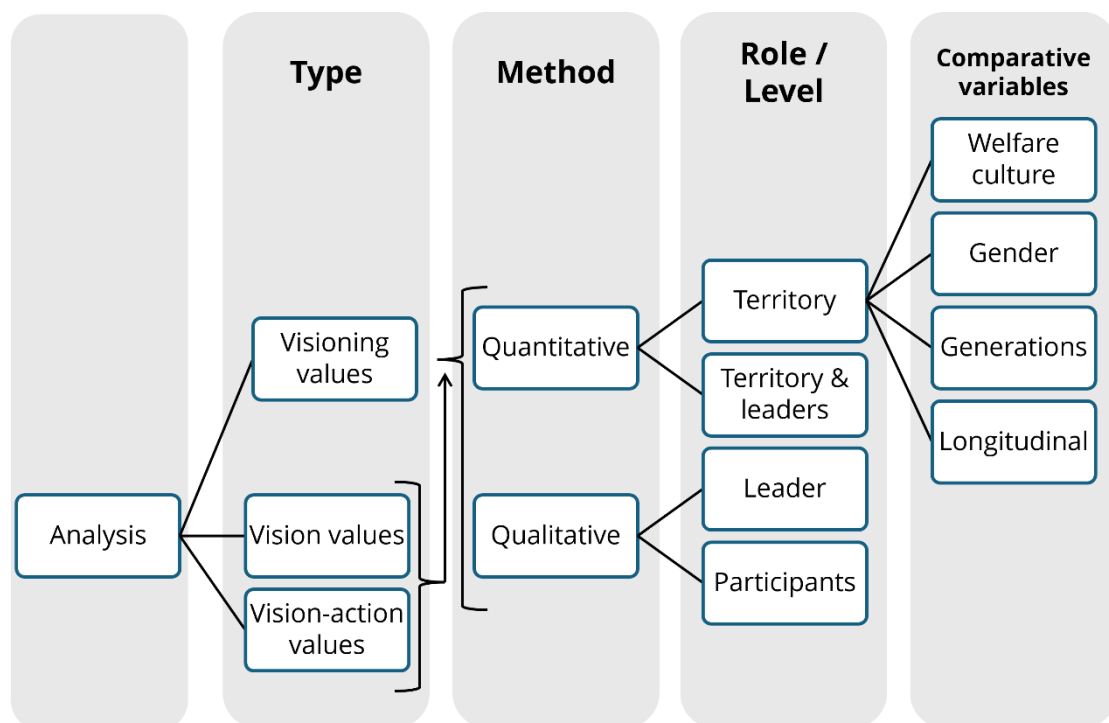
- H1: There is a trend towards post-materialist values (of personal expression) in the Basque Country.
- H2: The importance of the value of work is lower in younger generations.
- H3: Euskadi has a higher locus of control than the European average.
- H4: Gender differences on locus of control have decreased in the last decade in the Basque Country.

On the other hand, to test the robustness of the framework and propose the required modifications for a consolidated and tested framework, the main outcome of this dissertation.

5.1. Structure of the analysis

A mixed analysis will be performed by combining quantitative and qualitative approaches as explained in the methodology chapter (see 1.2.2). The following image provides a visual representation of the logic employed and the relationship between the elements of the conceptual framework. It illustrates the various stages of the analysis, with the 'visioning values' serving as an example (since the same approach is adopted for visioning values and vision-action values).

Figure 5.1 Analysis steps visualisation summary



Source: Own elaboration

Therefore, as shown in [Figure 5.1](#), the analysis is organised according to the typology of values, starting with visioning values (stage 1), vision values (stage 2) and vision-action values (stage 3). In each of these, a selection of values measured by the EVS has been made, which will be measured at territorial and leadership team level. As is widely explained in the methodology, a longitudinal analysis will be carried out (when available), and an analysis by the perspective of gender, age (generation) and in comparison with the different welfare culture models (Ferrera, 1998).

For the qualitative analysis, the interventions of leaders and participants, are analysed based on the systematisations of the Euskadi 2040 visioning process, with the use of the CAQDAS Atlas.ti. Literal quotations from the contrast sessions are included as data, referenced by their selected ID number as identified in the Factsheets (see Appendix IV). Additionally, the resulting

vision is also analysed in order to understand to what extent does it reflect the values of the participants and/or the leadership team.

The last section in each of the stages introduces the main conclusions extracted for the values in each category.

5.2. Visioning values

The following section presents an analysis of the visioning values, that is to say, the values pertaining to the vision development process. To this end, a quantitative perspective is adopted through an examination of a select number of values reported in the EVS. This analysis is complemented by a qualitative perspective derived from an examination of the systematisations of the Euskadi 2040 process.

5.2.1. Quantitative perspective

For the quantitative perspective of visioning values, three social values analysed in EVS data have been selected, for their impact in the willingness or reluctance to undertake a visioning, or normative futures exercise. Those three values are the freedom of choice and locus of control, and two perspectives of trust, on the one hand, general trust, and on the other hand trust in government. As described in the methodology chapter, a longitudinal analysis will be made as well as comparative analysis by gender, generation and diverse welfare culture models (Ferrera, 1998). First, a territorial analysis for the Basque Country is provided, and second, a comparison is made between territorial values and values expressed by process leaders, in order to understand their values impact in the process.

5.2.1.1. Territorial values

Freedom of choice and locus of control

Box 1 EVS | Freedom of choice and locus of control

“Some people feel they have completely free choice and control over their lives, and other people feel that what they do has no real effect on what happens to them. Please use the scale to indicate how much freedom of choice and control you feel you have over the way your life turns” (1-10 scale)

Freedom of choice is defined as *“the size of an opportunity set with mutually exclusive alternatives. The larger is the set of alternatives (choices) the more is freedom of choice”* (Verme, 2009, p. 147). However, it is important to note that different authors may refer to it using varying terminology: sense of freedom or sense of free choice (R. Inglehart et al., 2008), (perceived) individual autonomy (Graafland, 2023; Steckermeier, 2021). Other authors also distinguish between the freedom of choice and the locus of control itself (Verme, 2009). Since the purpose of this dissertation is not merely on the analysis of the locus of control value, the question will be analysed as a whole.

The freedom of choice and locus of control is a particularly relevant visioning value due to its connection with Amara's third premise about the future: "Future outcomes can be influenced by individual choices. Therefore, individuals can jointly define *preferable futures*" (R. Amara, 1981). The hypothesis is that the higher the sense of freedom of choice and locus of control, the higher the likelihood of engagement in normative futures exercises, since there will be a perception that the future is (at least up to a certain point) decidable. It also has a deep connection with the existing different epistemologies about the future, i.e. how knowledge about the future is generated (see 2.2.3).

The following table shows some descriptive statistics of the value locus of control, with a longitudinal perspective and a comparison among the different welfare culture models (Ferrera, 1998). The mean helps identify the average of the territorial values regarding freedom of choice, and the standard deviation how wide the span is.

Table 5.1 Locus of control descriptives by country and time

Locus of control (Q9)	Mean		Std. Deviation	
	2008	2017- 2019	2008	2017-2019
Euskadi	7.27	7.11	1.930	2.101
Finland	7.57	7.82	1.780	1.586
Germany	6.62	7.19	2.123	1.891
Great Britain	7.11	7.42	2.116	1.913
Spain	6.84	7.38	1.870	1.898
Europe	6.76	7.21	2.329	2.089

Notes: Scale (1) Low locus of control— (10) High locus of control

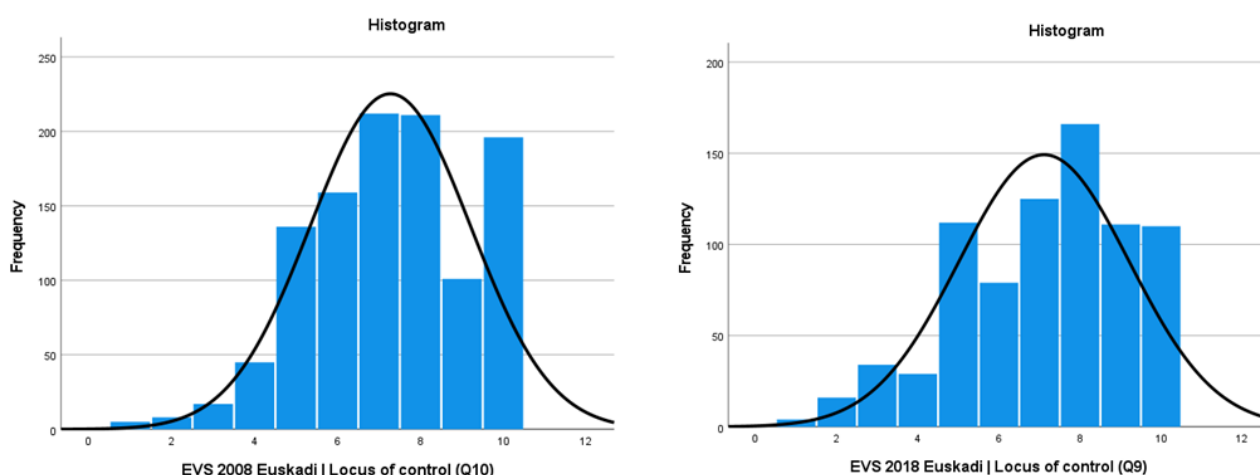
Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

There is a trend towards an **increase in the locus of control across most regions**, indicating that individuals may feel they have more control over their lives from the last EVS wave. However, **Euskadi is an outlier of this tendency**, as, despite in 2008 the perception of control was high (higher than in Spain, Germany and Great Britain, only behind Finland) the feeling of control has decreased after a decade (it is now behind all the rest of the comparable territories). It is also notable that in the Basque region the variability of responses has increased, showing the homogeneity regarding the value of locus of control has decreased. Finland, which is also one of the countries that has more extensible institutionalised foresight practices (Amini et al., 2021; Dreyer & Stang, 2013; SOIF, 2021), stands out for its consistently high scores and greater internal agreement over time. Locus of control in Euskadi in the last wave is lower than the European average, therefore, H3 is rejected.

If we delve deeper into whether there is a shared perception of the locus of control value in Euskadi, the following [Chart 5.1](#) shows there has been a considerable evolution. On the lower limit of the value, a higher percentage of population believes what they do has very little effect on what happens to them. Similarly, on the higher limit of the value, there was a high percentage of people who believed they had full control over their lives in 2008; the proportion

has lowered considerably a decade after (in 2018), most likely, linked with diverse external phenomena, such as the financial and economic crisis (which started in the year of the first survey) triggering higher economic uncertainty and instability, and/or the wider political and mediatic attention to climate change. Most people still believe that they have, despite not full, a high level of freedom of choice, following a normal distribution that enables the emergence of a shared perspective on this visioning value.

Chart 5.1 Evolution of locus of control distribution in Euskadi



Notes: The question was assigned a different number depending on the wave of the EVS, despite remaining unmodified. (1) Low locus of control— (10) High locus of control

Source: Own elaboration based on EVS data on Atlas.ti

When including the variable of the **gender** of the respondents, the same pattern is perceived in all territories, with an overall increase in the locus of control except for Euskadi. In addition, there is a north-south divide as in Germany, Finland, and Great Britain female respondents have a higher sense of freedom of choice in the most recent study, whereas, in Spain there are no gender-related differences, and in the Basque Country, it is male respondents who have a higher locus of control. The gender gap has widened slightly since 2008 in Euskadi. This means that H4 is rejected, as gender differences have not decreased regarding locus of control in the Basque region.

Table 5.2 Locus of control descriptives by country and gender

Locus of control (Q9)	Female (mean)		Male (mean)	
	2008	2017-2019	2008	2017-2019
Euskadi	7.20	7.01	7.34	7.22
Finland	7.67	7.90	7.47	7.73
Germany	6.54	7.20	6.71	7.18

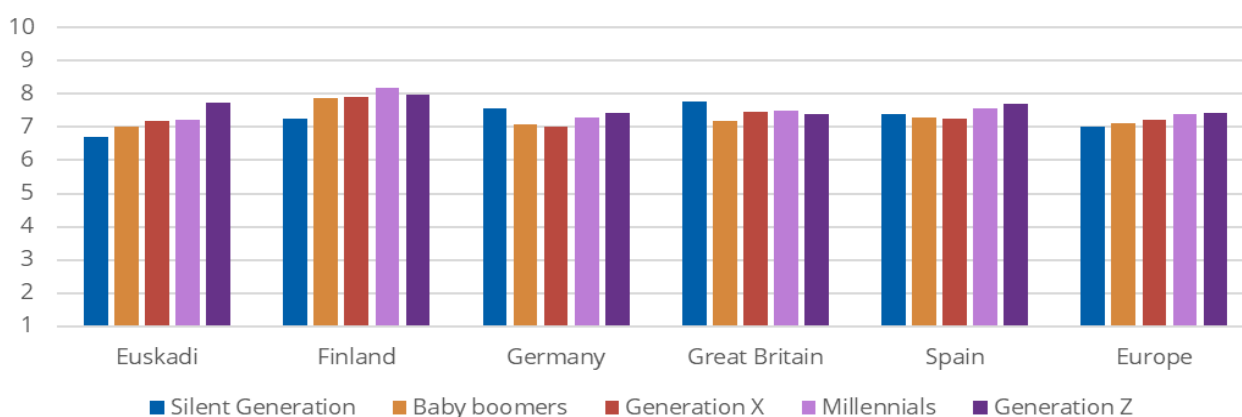
Great Britain	7.25	7.50	6.91	7.31
Spain	6.83	7.38	6.85	7.38
Europe	6.71	7.15	6.83	7.29

Notes: Scale (1) Low locus of control— (10) High locus of control

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

For the last available EVS wave during the writing of this dissertation, younger cohorts (particularly Generation Z and Millennials) tend to show a higher locus of control than older ones in most countries, particularly in Finland, Spain and in the Basque Country. Euskadi has experienced a decline in all but the youngest age group. This may indicate a cultural shift towards a stronger belief in personal agency among younger cohorts in Europe.

Chart 5.2 Locus of control descriptives (mean) by country and generation



Notes: Scale (1) Low locus of control— (10) High locus of control

Source: Own elaboration based on EVS 2017-2019, and EVS 2018 Basque Country

Older generations, however, have suffered loss of freedom of choice in the Basque region, being the Basque Silent generation the only group among all countries compared with an average lower than 7 (6,70), and that has even lowered from the data from 2008. Conversely, in Germany and Great Britain, silent generation has the highest locus of control.

General trust

Box 2 EVS | General trust

Generally speaking, would you say that **most people can be trusted** or that you can't be too careful in dealing with people? (Q7)

- (1) Most people can be trusted
- (2) Can't be too careful

In addition to the perception of being in control (at least up to a certain point) of the future, in order for territories to participate in normative foresight exercises, trust is central value, as it helps to build social connections and create networks. Trust is also the value per excellence that has been reported to have an influence in the economic development of territories (Beugelsdijk & Van Schaik, 2005; Knack & Keefer, 1997). Therefore, it is highly relevant to analyse the behaviour of trust in the different societies due to its connection with the initiation of shared endeavours, in this case, shared visioning exercises.

As the next table shows there has been an increase in general trust over the time, particularly in Germany and in the Basque Country. The slight increase in standard deviation in most of the territories indicates that, although trust is generally on the rise, perceptions have become more varied. Euskadi has evolved from the second lowest level of trust in 2008, to one of the highest, 10 years after, very similar to Germany, and only behind Finland, where it is considerably higher than in other territories.

Table 5.3 General trust descriptives by country and time

General trust (Q7)	Mean		Std. Deviation	
	2008	2017- 2019	2008	2017-2019
Euskadi	1.67	1.54	0.470	0.498
Finland	1.35	1.28	0.478	0.448
Germany	1.61	1.53	0.487	0.499
Great Britain	1.60	1.59	0.475	0.493
Spain	1.66	1.59	0.475	0.492
Europe	1.70	1.60	0.458	0.489

Notes: (1) Most people can be trusted – (2) Can't be too careful

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

General trust has increased in Euskadi for both female and male respondents over time and the gender gap has also decreased. For most of the territories female respondents show higher or equal levels of general trust (except for Great Britain, where differences are minimal). Therefore, there is a favourable evolution of the levels of trust in the last decade, quite homogenously throughout the different welfare cultures.

Table 5.4 General trust descriptives by country and gender

General trust (Q7)	Female (mean)		Male (mean)	
	2008	2017-2019	2008	2017-2019
Euskadi	1.65	1.54	1.69	1.55
Finland	1.36	1.26	1.35	1.30
Germany	1.61	1.53	1.62	1.53
Great Britain	1.60	1.59	1.59	1.58

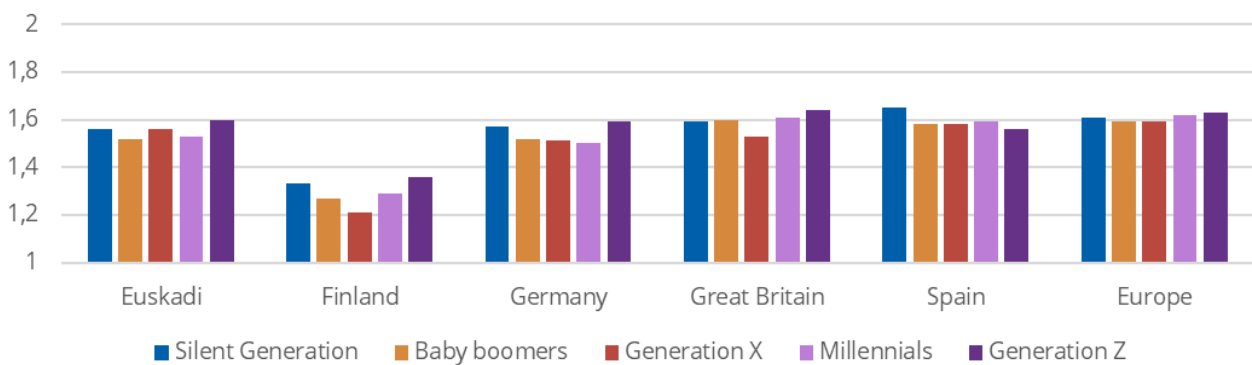
Spain	1.66	1.58	1.65	1.61
Europe	1.71	1.61	1.69	1.59

Notes: (1) Most people can be trusted – (2) Can't be too careful

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

When incorporating a generational optic, in 2008, there was minimal variation in levels of trust across generations in Euskadi, with all figures remaining within the range of 1.66-1.68. This suggests that at that time, there was a relatively uniform level of trust across generations. By 2017-2019, there was a notable increase in general trust across all generations in Euskadi. The development in the rest of the regions is uneven: Finland shows the highest levels of trust among all generations, in Spain the oldest cohort shows the lowest levels of trust, whereas in the rest of the territories the lowest level of trust is in the youngest cohort.

Chart 5.3 General trust descriptives by country and generation



Notes: (1) Most people can be trusted – (2) Can't be too careful

Source: Own elaboration based on EVS, 2017-2019, and EVS 2018 Basque Country

Governmental trust

Box 3 EVS | Trust in government

Please look at this card and tell me, for each item listed, **how much confidence** you have in them, is it a great deal (1), quite a lot (2), not very much (3) or, none at all (4)? (Q38)
(v131) Government

Governments are the most common sponsors of foresight exercises (Keenan & Popper, 2008b). Thus, in addition to the values regarding general trust, it is of particular relevance to analyse trust in government, in view of assessing the level of trust of vision initiative leaders. A low level of trust in government could predict the lack or limited participation in a shared vision exercise.

The following [Table 5.5](#) shows the values regarding trust in government for 2008 and 2017-2019 across the comparable regions. Lower values imply higher levels of trust in government. The **evolution regarding trust in the Basque government has been positive** over the last decade. The standard deviation also decreased indicating government trust have become more consistent and less variable over time. In comparison with the rest of territories, the same positive evolution of trust in government is found in all the rest of countries with the exception of Spain, where the levels of trust have decreased. In the last wave, Euskadi shows the highest level of trust in government, followed by the Scandinavian model, the continental model and the Anglo-Saxon model.

Table 5.5 Trust in government descriptives by country and time

Trust in government	Mean		Std. Deviation	
	2008	2017- 2019	2008	2017-2019
Euskadi	2.96	2.34	0.845	0.670
Finland	2.72	2.63	0.783	0.746
Germany	2.93	2.74	0.728	0.755
Great Britain	3.13	2.86	0.769	0.775
Spain	2.81	3.12	0.816	0.859
Europe	2.81	2.77	0.880	0.860

Notes: (1) A great deal, (2) Quite a lot, (3) Not very much, (4) None at all

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

As [Table 5.6](#) shows, from a gender perspective, female respondents show higher levels of trust than male respondents across all territories in the last wave. In Euskadi, the gender gap has increased, but it has shifted from the data in 2008.

Table 5.6 Trust in government descriptives by country and gender

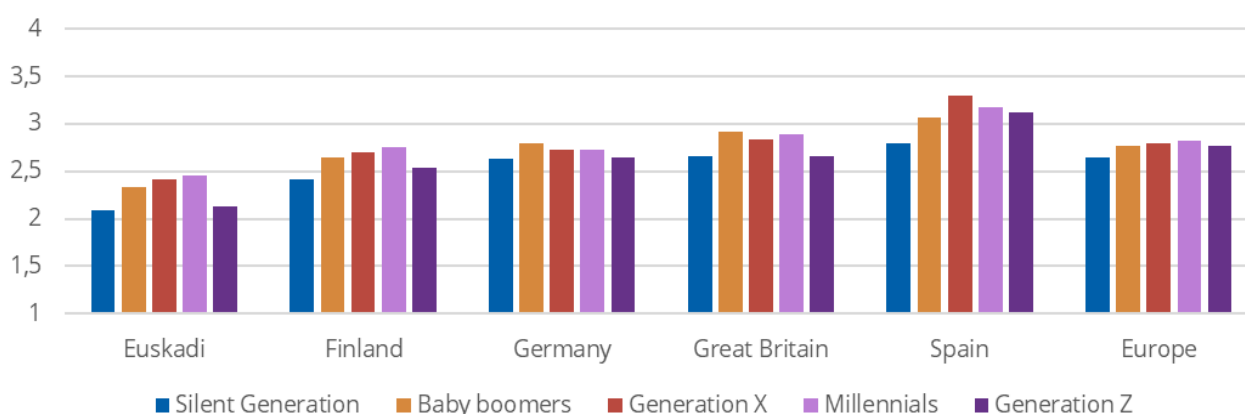
Trust in government	Female (mean)		Male (mean)	
	2008	2017-2019	2008	2017-2019
Euskadi	2.97	2.31	2.95	2.38
Finland	2.73	2.58	2.72	2.68
Germany	2.91	2.73	2.95	2.73
Great Britain	3.14	2.84	3.13	2.86
Spain	2.79	3.09	2.83	3.16
Europe	2.81	2.78	2.80	2.76

Notes: (1) A great deal, (2) Quite a lot, (3) Not very much, (4) None at all

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

As for the generational perspective (see [Chart 5.4](#)), trust in government has increased in Euskadi among all generations, particularly in the youngest cohort. The highest levels of trust in government are seen in the youngest and oldest age-groups. This pattern seen in Euskadi is also found in the rest of the territories. This might be attributed to factors like life experience, or perceived dependency on government.

Chart 5.4 Trust in government descriptives (mean) by country and generation



Notes: (1) A great deal, (2) Quite a lot, (3) Not very much, (4) None at all

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

5.2.1.2. Territorial and leaders' values

After having analysed the territorial visioning values, the subsequent stage of the process is to undertake an analysis of the values of the individuals who were leading the initiative, to understand the impact of their values in the process. As described in the methodologic chapter, this analysis has been done based on the questionnaire (selected EVS questions) filled in by the leadership group (Appendix I). Both locus of control and general trust values are analysed, whereas trust in government is not analysed since government representatives are part of the leadership driving group.

Table 5.7 Locus of control and general trust comparison between leaders and territory

	Locus of control		General trust	
	Mean	Std. Deviation	Mean	Std. Deviation
Territorial	7.11	2.101	1.54	0.498

Leadership	8	0.894	1 ¹⁸	0.000
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Notes: Scale (1) Low locus of control— (10) High locus of control | (1) Most people can be trusted – (2) Can't be too careful
Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

Leadership reports both **higher freedom of choice** and **general trust** values than territorial values. In addition, there is a much lower variance among the leadership group, therefore, it is more homogenous rather than the territory in general, i.e. it exists up to a certain point shared visioning values among the leadership group.

The high locus of control as a value indicates that the leadership team believes there is scope to steer the future in a more desirable direction. This value is reflected in the initiation of the process and the selection of a normative method. The unanimously trustful attitude is also reflected in the opting for a participatory visioning exercise.

5.2.2. Qualitative perspective

The following section presents a qualitative analysis of the visioning values as represented in the Euskadi 2040 process. The subsequent table illustrates the dimensions and sub-dimensions that will be subjected to analysis.

Table 5.8 Visioning values qualitative analysis overview

Category	Dimension	Subdimension	Logic
Typology of values	Visioning values	Context	Inductive
		Method	Deductive
		Participation	Deductive

Source: Own elaboration

The first step is a Co-Occurrence Analysis in order to understand the significance of the visioning values throughout the process, as well as their distribution in accordance with the role of the individuals who express them in the process (leaders, or participants). Territorial is employed for the resulting vision, as it is targeted at the region as a whole.

Table 5.9 Visioning values citation distribution by role in the process

	Context	Method	Participation	Visioning values
--	---------	--------	---------------	------------------

¹⁸ The leadership group is formed by four policymakers from the Basque government and two researchers. For this questions only three responses were obtained.

Leaders (total = 113) (100%)	4 (3.5%)	26 (23%)	22 (19.5%)	52 (46%)
Participants (total = 362) (100%)	2 (0.5%)	28 (7.7%)	16 (4.4%)	46 (12.7%)
Territorial (total = 66) (100%)	1 (1.5%)	6 (9%)	1 (1.5%)	8 (12.1%)
Sum of citations	7 (6.6%)	60 (56.6%)	39 (36.8%)	106 (100%)

Note: Documents were obtained between September 2021 and November 2024

Source: Own elaboration based on Atlas.ti

From both [Table 5.9](#) and [Figure 5.2](#), several conclusions and patterns emerge. These include the observation that references to visioning values are similar for both leaders and participants. However, it is notable that they account for almost half (46%) of the leaders' total references and only 12.7% of the participants' total references. Therefore, **leaders give proportionally higher relevance to visioning values than participants.**

Figure 5.2 Visioning values and process role Sankey diagram



Source: Own elaboration via Atlas.ti

Among visioning values, most of references are to the method employed (56.6%), followed by the scale and way of participation (36.8%) and finally, clearly less mentioned, context (6.6%), regardless the role (leadership or participants) in the process.

What follows is an in-depth analysis of the content of the two groups' discourse on the three sub-dimensions of visioning values (context, method and participation).

5.2.2.1. Leader's visioning values

Regarding the **context**, there is a unanimous perception among the leaders of the visioning process (both from academic and political leadership) that we are in an environment with high levels of uncertainty. Adjectives such as *'uncertain'*, *'volatile'*, *'changing'*, *'complex'* (Doc 63:2), *'framework of uncertainty and concern'* (Doc 83:1), *'fraught with threats and challenges'* (Doc 83:2) are used by leaders. The global dimension is also highlighted, *'global hyperconnectivity'* (Doc 63:2) and *'globalisation'* (Doc 82:3). A subtle negative connotation of uncertainty can be observed in the quotations, connecting with the uncertainty avoidance cultural dimension of Hofstede.

"The only certainty is uncertainty (...) What is new is not the changes, but their acceleration and globalisation". (Doc 83:3)

"The overall framework remains one of uncertainty and concern". (Doc 83:1)

Regarding **participation**, the following are some of the discussion points raised by process leaders and the type of decision-making that happen within the driving group of the visioning process:

- Which actors are (specifically) involved in connection with the societal groups they represent, and to whose voice needs to be represented in the process.
- What are the specific objectives of the different contrast session. For example, in the international contrast, a double objective was pursued: *"First, to inject ideas and position the Basque Country and the project in international networks of experts. Second, academic contrast"* (Doc 19:3).
- The optimal procedure for organising the contrast sessions with the involved actors. These entailed decisions regarding protocolary aspects, and whether actors were convened individually or collectively (e.g. trade unions individually, hidden champions together, ...).
- The process to communicate and contrast the vision internally, within the Basque government.
- Reporting and general evaluation of the visioning and *backcasting* process by the academic partners (present in every contrast session) to the government.

Visioning values regarding the **method** are the most referred to by the leadership team, closely followed by perceptions regarding participation. In addition, an evolution can be seen in the political side of leadership regarding visioning values. Particularly two aspects are highlighted: the use of quantitative methods and the function of foresight.

First, in line with the findings of the quantitative analysis, a high locus of control is reported by leaders, also in the public appearances, in terms of a need of a proactive and positive approach towards the future, as the following expression evidence:

"Uncertainty is a given. It is up to us to turn these threats into opportunities." (Doc 83:5)

Policymakers in leadership positions are reluctant to accept deterministic theories of the future. At the outset of the process, they tended to associate strategic foresight with the development of 'projections', which they did not rely upon heavily in making decisions.

"Due to the uncertain and volatile context in which we are immersed and the possible inaccuracy of projections, it is not very feasible to make decisions based solely on strategic foresight." (Doc 13:1)

However, at a later stage of the process, when asked about the contribution of the project, policymakers themselves recognised the value of the initiative beyond mere projections, and the potential of strategic foresight for *"Becoming aware of new relevant issues and opening up new perspectives and visions for me"* (Doc 28:4)

Second, a high importance is given by leaders to quantitative measurement of the visioning exercise. The inclusion of indicators in the vision is perceived as the best way to make it more communicative and tangible for citizens, as a way to "grounding the vision" (Doc 6).

"It was agreed that in addition to a more extensive list of indicators, ten key indicators or country challenges will be proposed, to favour the communication and inspirational character of the Vision". (Doc 6:1)

Moreover, part of the leadership group showed reluctance to include aspects related to social values in the vision, due to their intangible character and difficulty of measurement. The significance of this issue as a potential source of competitive disadvantage in the future (and even the present) was acknowledged. However, the challenge of translating this into a measurable format meant that it was not initially included as a dimension in the vision. This entails a preference towards methods that can be objectivised.

"The only element pending assessment and decision on its incorporation is the introduction of "Engaged Euskadi /everyone's work" as a variable with its own entity. One difficulty expressed by the Basque Government is the difficulty of measuring this element". (Doc 17:3)

Lastly, aspects related to the method included also how the roles are distributed in the driving group for the contrasting process (if Orkestra carries out the contrasts individually or if the governmental representatives were also participating). For instance, *"Basque Government would be interested to attend the international contrast processes and with socioeconomic actors"* (Doc 17:14).

5.2.2.2. Participant's visioning values

Similarly to leadership values on the **context**, political participant actors also highlight there is a high feeling of uncertainty. However, they question the level of depth required in the transition towards a different model in the future:

"What is happening, the latest crisis, is not another summer storm. And I think we should be very aware of that. And there too I think (...) there are two positions. One of the storms or parentheses, and others think that we are in a time of deep changes, and therefore the goal cannot be to recover a possible normality that has gone forever. It was said during the first pandemic that it was the new normal; well, the new normal is not the old normal, and we will

not go back to the old days. What we think is happening is not a summer storm. What is happening is not a parenthesis". (Doc. 47:9).

Regarding **participation**, different stances can be observed among what participants expressed. Generally, the participatory nature of the process was perceived as necessary and highly valued, expressed particularly by institutional and political actors. Several interventions suggested the incorporation of additional actors into the contrasting process, to be assessed in the driving group (e.g. the Basque Youth Council, Entrepreneurs' Forum, other universities...). However, 'gratitude' and appreciation were not perceived from all actors involved in the same way, and certain actors expressed their reticence of being involved at a later stage in the process, not believing that there was room for revision, even if the vision was transmitted as a living tool:

"The first observation refers to the actual process of drawing up the document, which, unlike similar initiatives carried out in the past, has been promoted and drawn up exclusively by the Basque public-institutional sector. This procedure raises the question of the extent to which the document that is now being presented to us really has room for revision and, if necessary, adaptation following its comparison with the business sector and other agents." (Doc. 58:1)

Therefore, in addition to who is involved in the process, participants expressed importance of when actors are involved and their capacity to influence the outcome.

Regarding the **method**, the emphasis on prospective exercises and forward-thinking strategies is regarded as a positive development by a range of stakeholders, particularly other institutions and political parties represented in the Basque Parliament. Furthermore, the locus of control is also acknowledged by participants as high albeit incompletely, as expressed below:

"We are going into the future, whether we like it or not, but what fate and how we go can be partly in our hands, if we become aware of it. And the prospective exercises for this are to some extent very interesting and very welcome". (Doc 47:6)

Several participants also see the need for 'pedagogy' (Doc 51:6) in this futures arena both in society in general terms and particularly in some sectors such as business and SMEs, both as for reflection about the future and acting towards the future. In line with it, the collective and shared nature of the visioning process is perceived as highly positive and valuable.

"We need a change of corporate culture towards more thinking about the future and higher investment on people for the long term." (Doc 50:2)

"We will get it better together" (Doc 52:4)

"We think it is very important to do a collective exercise, the collective is important" (Doc 47:12)

"The value in addition to the document (e.g. vision), is the process itself" (Doc 87:6)

In turn, there are two very relevant barriers mentioned by participants and that are also reflected in the literature. Firstly, the pressure for short-termism in government and politics, and the lack of time to engage in other, more long-term thinking which is extensively pointed out by literature (Dreyer & Stang, 2013; Monteiro & Dal Borgo, 2023; OPSI, 2020; Schmidt, 2015; SOIF, 2021; Tonurist & Hanson, 2020). Institutional representatives themselves expressed: *"It is appreciated that the spaces for reflection have been facilitated, because there is not so much time*

for this in the daily life" (Doc 51: 5). Secondly, there is a concern that the document will remain a mere piece of writing without any practical application. In other words, that it remains a utopian vision with no transformative capacity.

"I fear it might remain merely as a document; it needs governance and cooperation for its realisation" (Doc 87:3)

"The first message is that I think it is essential that we believe this. That this is not subjected to eventualities, but rather we believe on it so that we can make it happen" (Doc 52:6)

There is also a recognition among participants of the significant value that academic work brings in guiding this process. As one participant highlighted:

"The academic vision is very enriching in order to forge documents that can be the basis for further concrete negotiations." (Doc 47:33).

And similarly to leaders, business sector valued that the vision incorporates quantitative measurement of progress (indicators):

"We propose that in order for the Euskadi 2040 vision to be more inspirational, that 5/6 territorial objectives are defined, so that they can be inspirational in order to drive the actions and behaviour of the whole of Basque society towards the achievement of the vision". (Doc 58:4)

5.2.2.3. Resulting visioning values

The following section analyses the way in which visioning values have been expressed in the resulting shared vision and process description of Euskadi 2040. This analysis will enable us to ascertain the extent to which the values espoused by the leaders and/or participants have been incorporated into the resulting vision and the vision development process or not. The analysis will be divided into the three identified sub-dimensions of visioning values: context, method and participation.

In terms of context, a strikingly similar formulation of leadership discourse is observed, markedly influenced by academic leadership, underscoring the inherently uncertain and volatile nature of the context. This aspect is also highlighted by the participants, yet the result fails to revisit the depth of change required by some participants. Consequently, we observe a greater reflection of the visioning values of leadership in the result than of the participants themselves.

"The volatility, complexity and hyper-connectivity of the world have been highlighted during the recent crises, both the Covid-19 social and health crisis and the energy-environment crisis, highlighting the relevance of being prepared for an uncertain future." (Doc 89: 13)

Regarding the method, both leaders and participants showed highly similar visioning values. The selection of a normative method (the construction of a shared vision) by the leadership team inherently entails the acknowledgement of potential avenues for future action and influence, thereby indicating a high degree of locus of control, and calling for action, as showed by the following statements:

"In line with the pluralistic approach of foresight, which understands that there is no single future to be predicted, but rather that there are multiple futures, the main objective of the project has been to define the desired future for the Basque Country, i.e. the orientation that the model of competitiveness that is to be implemented should have". (Doc 89:6)

"The construction of a shared vision means building a common basis for collective action, accepting and respecting the positions and perceptions of the actors in the territory." (Doc 89:7)

"The Euskadi Vision 2040 is an effort to proactively build the desired future in a singular or autonomous way." (Doc 89:12)

As part of the normative future exercise, a trend analysis is also performed. The selection of this method hints that despite there is a recognition of a high locus of control, there are worldwide trends that have and could have an impact on the territory, that must be taken into account when formulating one's own vision for the future. This goes in line with the critical realism approach (W. Bell, 2017; Gong, 2024), where there is an understanding that the future is influenced (to a high extent) but not completely determined by human action on its own.

"A parallel analysis of global trends and their impact on it is necessary in order to obtain a clue as to the social, economic and environmental evolution on the horizon, in which to place the desired future." (Doc 89:9)

Continuing with external phenomena with an impact on the territory, the recognition of majoritarian or official visions stands out, expressing the compatibility of Euskadi 2040 with them. In other words, it is constructing its own narrative, compatible with the vision of sustainable development projected by other multilateral and international organisations.

"The development of the Euskadi 2040 Vision and Challenges is an exercise in reflection at regional level that takes into account the various frameworks for sustainable development and climate objectives set by European and international supranational bodies." (Doc 89:11)

Finally, regarding the method, the resulting vision has a set of quantitative targets and a broader list of monitoring indicators. The development of this method originated within the leadership team but is widely appreciated by many participants, particularly business sector; it therefore reflects the will and discourse of both groups.

"To ensure that the evolution of the Euskadi Vision 2040 could be followed, an ad hoc monitoring system was developed for it. In addition to this function, the setting of targets was also intended to establish specific objectives that could be inspiring and aspirational for the different actors in the territory and for the citizenship." (Doc 89:10)

As for participation, the process was from the beginning designed based on a co-creation paradigm, between academic and political leadership, and further socioeconomic actors were incorporated at a later stage, signifying value is given to social capital and the common good, which is everyone's responsibility.

"The vision has been built collaboratively, and specifically, it has materialised in four areas of collaboration to arrive at a shared narrative: academic-territorial collaboration,

interdepartmental collaboration, multi-level inter-institutional collaboration, and multi-agency collaboration.” (Doc 89:8)

The scope and manner in which the participatory process was conducted was determined and decided by the leadership team, but this does not detract from the fact that there was an open attitude to the numerous contrasts suggested by the participants, which were actually implemented.

From this we can conclude that the visioning values of both leaders and participants are reflected in the outcome, with the leadership team playing a dominant role in decision making, particularly about the method and participants.

5.2.3. Visioning values conclusions

The analysis of the visioning values of the territory can be summarised as follows:

Visioning values in the Basque region include, giving value to the process to be a *futures exercise* (it has value in itself), that it is ***proactive*** (there is agency), that it is a ***collective*** exercise (meaningfully collective, and not just for ticking the box), that it is ***implemented and “objectifiable”*** (preference for quantitative methods).

Locus of control has decreased in Euskadi, as opposite to other countries, and there is also a gender gap with female feeling less in control (aspect that is not happening in the comparison countries). The decreasing of the locus of control is problematic for normative foresight exercises, since they are based on the premise that the future is not determined and there is capacity to shape it. It might be linked to contextual characteristics, like the rapidly and globally changing environment with diverse crises (economic, social, sanitary) occurring more assiduously. A better understanding is required whether the loss of sense of freedom has decreased because people feel future is already predetermined or because there is a perception of lack of individual capacity to modify it.

Despite the decline, **the value of freedom of choice remains relatively high**, placing it just below Germany or the European average, but still far from Finland as the representative of the Scandinavian welfare culture model. The incorporation of further explorative methods (which follow a more deterministic paradigm) such as projections, trend analysis and scenarios, could serve to reinforce normative foresight exercises, thereby responding to the concerns of those sections of society that feel future is determined, and performing collective normative exercises could be responsive to those who do not perceive themselves as empowered to shape the future. A stronger focus on futures literacy could also help to understand the potential of the futures domain and foster empowerment through concrete tools, taking advantage of the higher sense of freedom from younger generations, offering a prospect of improvement in the future.

There is an increasing level of trust in the region (both, general trust and, particularly, trust in the government). The extant literature captures both relationships (Güemes & Resina, 2018): on the one hand, citizen participation in public policy processes has been demonstrated to increase trust. On the other hand, high trust has been shown to lead to involvement in public affairs and, therefore, to citizen participation. Even with regard to this final point, studies such

as that conducted by Parkins et. al. (2017) indicate that it is a tension between trust and distrust that drives public participation. It is evident that there is a preference for policy processes to be conducted in a participatory manner among both leaders and participants. A high level of trust, both general and in government, suggests that citizens are likely to respond positively and engage in visioning exercises, which would along with it reinforce trust.

Leadership reports both **higher freedom of choice** and **general trust** values than territorial values. The high locus of control as a value indicates that the leadership team believes there is scope to steer the future in a more desirable direction. These values are reflected in the initiation of the process and the selection of a normative method. The unanimously trustful attitude is also reflected in the opting for a participatory visioning exercise out of the extensive pool of tools existing in the futures domain (see 2.2.7).

5.3. Vision values

The following section presents an analysis of the vision values of the Basque Country, that have been defined as the values that impact the resulting vision. While visioning values are the ones that have an impact on the process of the development of the vision, vision values influence directly the outcome. Vision values are analysed also via a mixed approach by combining quantitative and qualitative methods.

5.3.1. Quantitative perspective

From a quantitative perspective several values of the EVS have been selected for analysis. They have been selected for their connection with the vision theme or thematic focus, which is competitiveness for wellbeing; together with this, the series of values that influence economic development identified in the literature (Alesina & Giuliano, 2015; Apsalone & Šumilo, 2015; Roland, 2020) have been taken into account. The resulting selected vision values that will be analysed are the following:

- *Post-materialism index*: The index is one of the most well-known measurements used in social values domain, coined by Inglehart. As referred to in the theoretical chapter, materialist values refer to order and economic stability, whereas, post-materialist values refer to items such as free speech and political participation (R. Inglehart, 1977, p. 29). The index measures the value-orientation of a territory towards postmaterialism or materialism.
- *Values to be transmitted to children at home*: Family traits represent a fundamental set of values that significantly influence a child's development (Alesina & Giuliano, 2015; Roland, 2020). Moreover, the values prioritised for transmission within families often serve as indicators of a society's preferred future values.
- *Adequacy of competition*: While competition does not inherently equate to competitiveness, it has been selected as a key value to assess society's orientation toward competitive dynamics. Competition is a critical component of the broader competitiveness construct, which forms the central theme of the vision under consideration.
- *Preferred welfare state provisions*: As highlighted in the existing literature, there is a reciprocal relationship between welfare states and societal values (Pfau-Effinger, 2005). This value reflects societal priorities regarding the provisions that the state is expected to ensure, offering insight into the collective preferences for welfare support.
- *Individual versus state responsibility for livelihoods*: The balance between individual and collective responsibility is a critical value influencing societal development. Literature identifies the degree of individualism or collectivism as a value with substantial impact of territorial development (Alesina & Giuliano, 2015; Apsalone & Šumilo, 2015; Roland, 2020). For this reason, it has been selected as a key "vision value" in the present analysis.

5.3.1.1. Territorial values

Post materialism index

Box 4 Post-materialism index

The analysis of the level of materialism or post-materialism is based on the responses from the following questions:

People sometimes talk about what the aims of this country should be for the next ten years. On this card are listed some of the goals which different people would give top priority. Would you please say which one of these you consider the most important? (Choose a first and second option)

- A. A high level of economic growth (Materialist)
- B. Making sure this country has strong defence forces (Materialist)
- C. Seeing that people have more say about how things are done at their jobs and in their communities (Postmaterialist)
- D. Trying to make our cities and countryside more beautiful (Postmaterialist)

And from the following:

- A. Maintaining order in the nation (Materialist)
- B. Giving people more say in important government decisions (Postmaterialist)
- C. Fighting rising prices (Materialist)
- D. Protecting freedom of speech (Postmaterialist)

Regarding the post-materialism index, as is the case in the majority of regions, the population of the Basque Country exhibits a 'mixed values' orientation, whereby the two most salient values are one materialist and one post-materialist (Silvestre et al., 2024). The results suggest that fostering inclusive decision-making in jobs and in their communities (top choice, 83.9% in sum) and promoting economic development (76.5% in sum) are among the preferable values for the future of Euskadi. The relatively low priority of defence (lowest, 6.5% in sum) indicates confidence in existing security arrangements, while moderate interest in environmental aesthetics (32.3% in sum).

Table 5.10 Country's objectives in 10 years in Euskadi (2019)- Part 1

	1 st place	2 nd place	Sum	Ranking
High level of economic growth	47.4	29.1	76.5	2º
Making sure this country has strong defence forces	1.9	4.6	6.5	4º
Seeing that people have more say about how things are done at their jobs and in their communities	46.6	37.3	83.9	1º
Trying to make our cities and countryside more beautiful	4.1	28.1	32.3	3º

Notes: The data shows the percentage of time respondents chose the quality

Source: Own elaboration based on EVS 2019 Basque Country

From a gender perspective, no correlation between higher levels of post-materialism and a particular gender is observed in this series of questions. Indeed, a greater proportion of women express support for the two most important priorities, namely 'high economic growth' (a materialistic value) and 'seeing that people have more say about how things are done at work and in communities' (a post-materialistic value).

A comparison of the second set of questions reveals a divergence in results (see Table 5.11). In the Basque population, post-materialist values are accorded a higher priority, and there has been a notable evolution in this regard since 2008. The aspect deemed most important for the future is the existence of participatory governance, with greater citizen power in decision-making (62.3% in sum). The post-materialist value of freedom of expression is also of significant importance (55.4% in sum), having increased in importance since 2008, when it was ranked fourth. The materialist value of addressing inflation is in third place (46.9% in sum). In fourth place is the materialist value of maintaining the order of the nation (35.5% in sum). That being said, closer percentages are observed between the qualities of the second set of questions.

The two sets of questions yield coherent results, particularly with regard to the prioritisation of **participatory decision-making across all areas of life** (work, community and politics). This implies a value orientation consistent with the shared development of visions of the future for the territory, thereby providing scope for co-definition of the desired future. No profound gender disparities were observed in this regard.

Table 5.11 Country's objectives in 10 years in Euskadi (% , 2019)- Part 2

	2019				2008
	1 st place	2 nd place	Sum	Ranking	Ranking
Maintaining order in the nation	15.6	19.9	35.5	4º	3º
Giving people more say in important government decisions	37.5	24.8	62.3	1º	2º

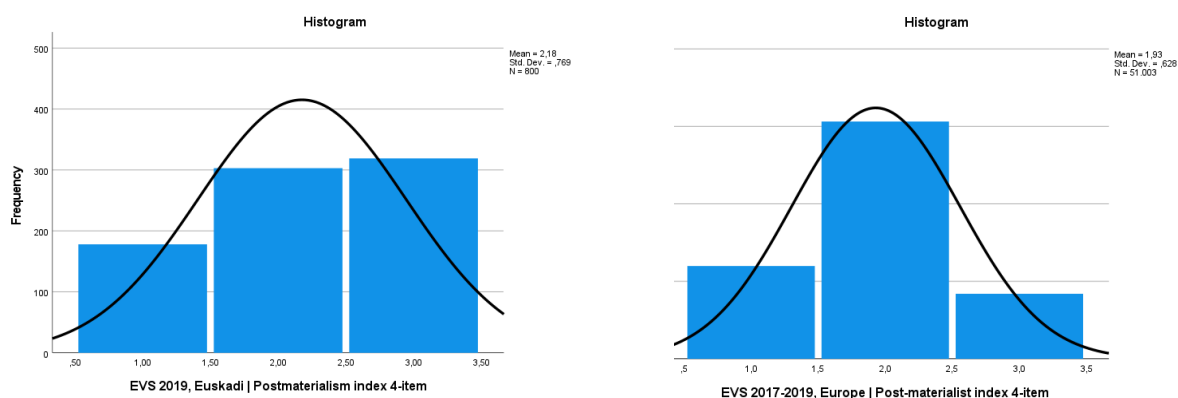
Fighting rising prices	26.8	20.1	46.9	3º	1º
Protecting freedom of speech	20.1	35.3	55.4	2º	4º

Notes: The data shows the percentage of time respondents chose the quality

Source: Own elaboration based on EVS 2008 and 2019 Basque Country.

A calculation of Inglehart's classical postmaterialist index reveals that the Basque population exhibits a markedly higher level of postmaterialist orientation than the European average in the most recent wave. Therefore, H1 is confirmed as there is a tendency towards post-materialism in the Basque Country. It must be noted that, there has been a wide debate on the literature about the post materialism thesis developed by Inglehart and his colleagues (Abramson, 2011), facing extensive criticism (Duch & Taylor, 1993; Jasny, 2013). The criticism, however, has primarily focused on the theoretical framework that has been proposed in conjunction with the index, rather than on the index itself.

Table 5.12 Postmaterialist index (4-item) in Europe and Euskadi

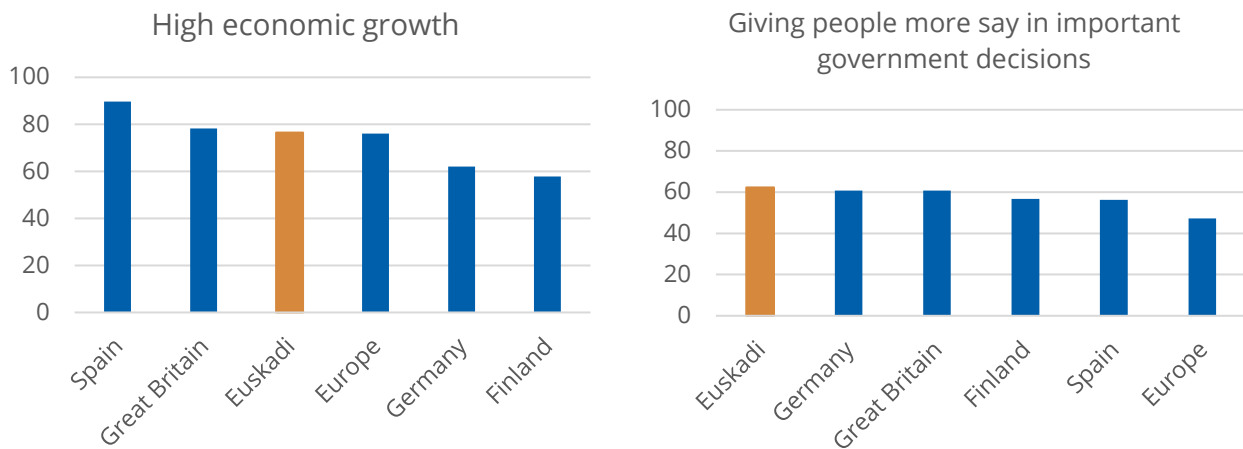


Notes: The data shows the percentage of time respondents chose the quality

Source: Own elaboration based on EVS 2017-2019 Europe, and Basque Country.

If we take two central areas in the Euskadi 2040 process and the vision of the competitiveness model for wellbeing, as economic growth and participatory governance are, the following results can be observed. In relation with comparable territories, the Basque Country has an intermediate position with respect to the importance of economic growth, which is prioritised particularly in Spain and the United Kingdom, and to a lesser extent in the Scandinavian model (see [Chart 5.5](#)).

Chart 5.5 Importance of high economic growth by country (% , 2017-2019)



*Notes: The data shows the percentage of time respondents chose the quality
Source: Own elaboration based on EVS 2017- 2019 Europe and Basque Country*

In terms of the significance of collaborative governance, it is evident that, the **Basque Country is at the forefront, representing the territory that places the greatest emphasis on forging a future through participatory decision-making.**

Preferred values to be transmitted to future generations

Box 5 EVS | Qualities that children should learn at home

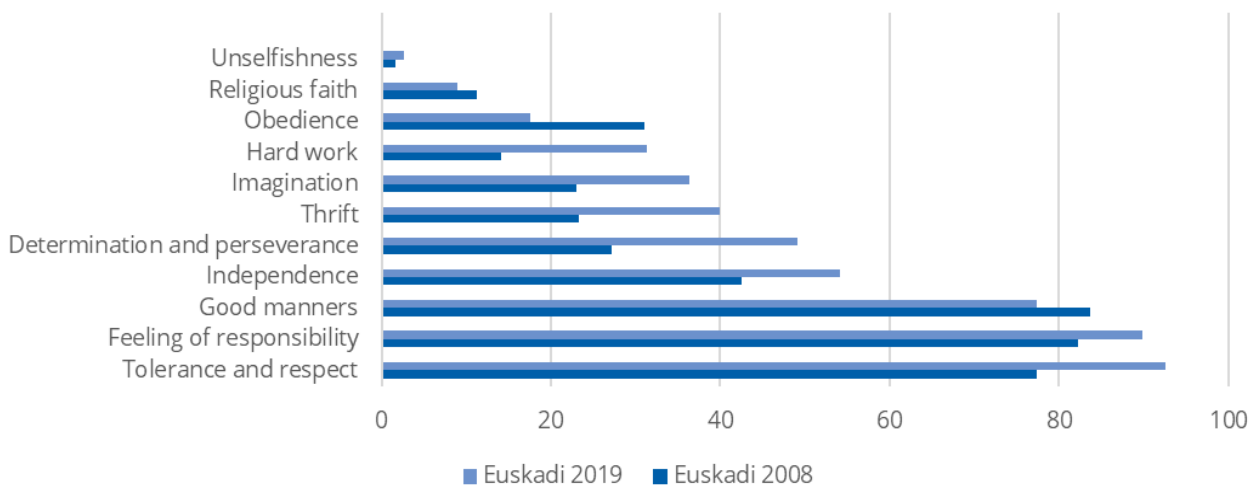
From the following list of qualities that children can learn at home, what do you think are the top five qualities that every child should learn?

- (1) Mentioned
- (2) Not mentioned

The qualities that are to be conveyed to future generations are an important vision value, as they determine the values on which the society of the future is to be built. This refers in particular to the values to be transmitted within one of the fundamental institutions in the society as is the family. It is worth recalling here that, according to socialisation hypothesis, which is espoused by numerous authors (Hofstede, 2001; R. Inglehart & Welzel, 2005a; Silvestre, 2021), the most profound values are formed during childhood. It can be reasonably deduced that the values transmitted within the domestic environment to children would serve to shape their future identity in terms of values despite values are not invariable and can be shaped via the experience.

The subsequent Chart illustrates the evolution of the values transmitted within the family context between the two analysed waves. The top three values to be transmitted were and are “tolerance and respect”, “feeling of responsibility” and “good manners” although they have varied in the level of importance. The least highlighted qualities are “unselfishness” and “religious faith”. “Obedience” has lost importance over time, whereas “hard work”, “imagination”, “thrift”, “determination and perseverance” and “independence” are more mentioned in the 2019 wave.

Chart 5.6 Qualities that children should learn at home in Euskadi (% , 2008 and 2019)



Notes: The data shows the percentage of time respondents chose the quality

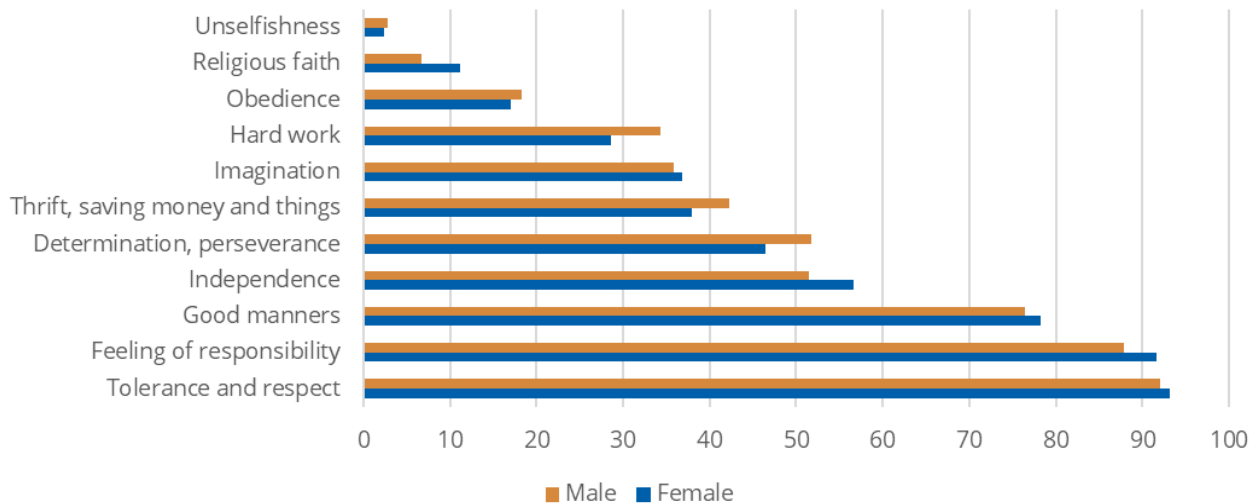
Source: Own elaboration based on EVS 2008 and 2019 Basque Country

From a gender perspective, certain differences can be perceived between male and female respondents (see [Chart 5.7](#)):

- Female respondents consider the following qualities to be transmitted at home more than men, (from most important to least): “tolerance and respect”, “feeling of responsibility”, “good manners”, “independence” and “religious faith”
- Male respondents mention more than female counterparts the following qualities (from most important to least): “determination and perseverance”, “thrift, saving money and things”, “hard work”, “obedience” and “unselfishness”.

The order of values by female and male respondents shows, that women show a higher social orientation than men. This is coherent with the findings by Zubietta et. al. (2006, 2012) that women show higher self-transcendence values than self-enhancement, according to Schwartz value-dimensions.

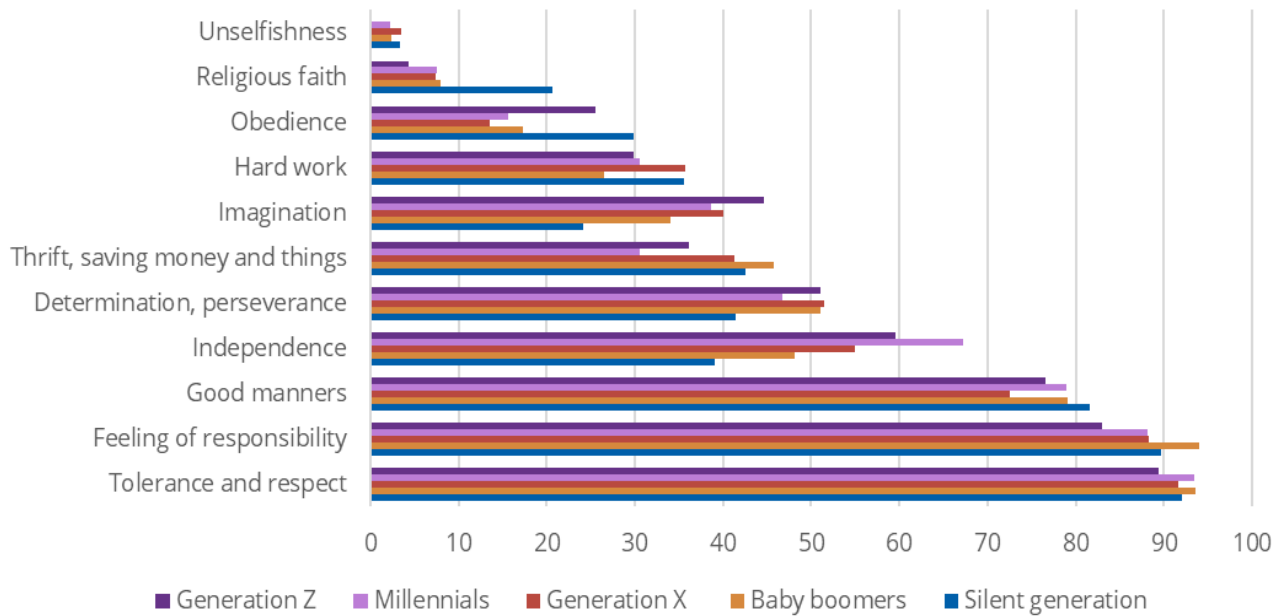
Chart 5.7 Qualities that children should learn at home in Euskadi by gender (%
2019)



*Notes: The data shows the percentage of time respondents chose the quality
Source: Own elaboration based on EVS 2019 Basque Country*

From a generational perspective, overall, younger generations place higher value on “independence” and “imagination” but lower value on “thrift”, “obedience”, and “religious faith”. The widest differences can be found in the quality “imagination”, where less importance is given to it with age. Large differences can also be found in the quality “independence”, quality that particularly Millennials appreciate. Nevertheless, “tolerance”, “responsibility” and “good manners”, remain being the top three qualities across all generations, reflecting high homogeneity in the Basque region.

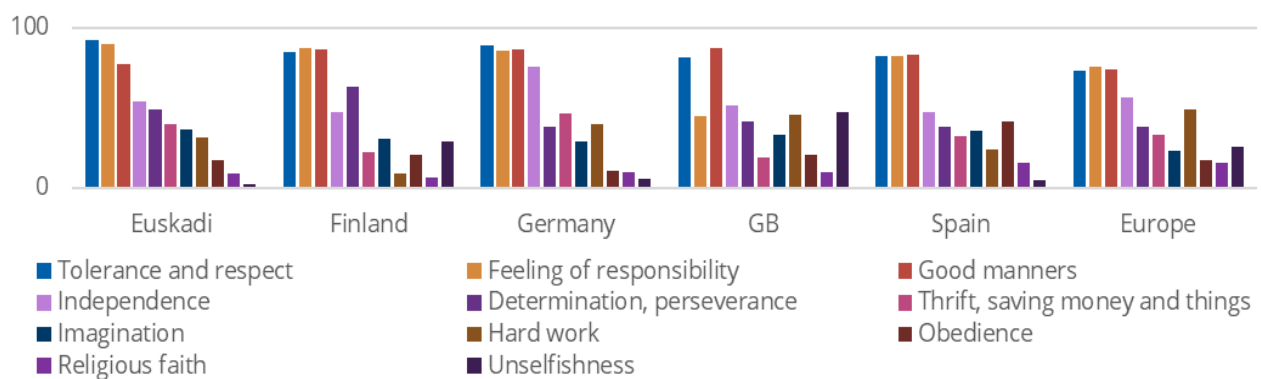
Chart 5.8 Qualities that children should learn at home in Euskadi by generation (% , 2019)



Notes: The data shows the percentage of time respondents chose the quality
Source: Own elaboration based on EVS 2019 Basque Country

The order of the qualities observed in the Basque Country is largely analogous to that of other territories, although there are notable exceptions. In Great Britain, for instance, the observed differences are particularly pronounced in comparison to the rest of the territories. In general, there is considerable overlap in the three most important qualities, while there is less homogeneity in the least important.

Chart 5.9 Qualities that children should learn at home by country (%)



Notes: The data shows the percentage of time respondents chose the quality
Source: Own elaboration based

Adequacy of competition

Box 6 EVS | Adequacy of competition

How would you situate yourself in the following scale?
(Scale 1-10). (1) Competition is good --- (10) Competition is harmful

The vision developed within the Euskadi 2040 process refers to the competitiveness for wellbeing model of the future for the territory. Competitiveness is a “elusive” word (Connor, 2003), and it is understood very differently depending on the author developing the competitiveness theory, and even further when it is applied to public policies, as it has certainly become a “political buzzword” (Kantola, 2006). Competition is not equivalent to competitiveness; however, competitiveness requires, up to a point, a certain level of competition. For this reason, the following section analyses the attitudes towards competition of the different comparable territories.

Taking into account the range of scores from 1 (competition is good) to 10 (competition is harmful) we see that all the values can be found between 3,5 and 4,9. This means that all values are between neutral positions and positive view of competition. Across most territories (with the exception of Great Britain), the mean score from 2008 to 2017-2019 has decreased, suggesting a shift toward viewing competition as slightly more positive or less harmful than a decade before.

Euskadi, together with Spain, show the highest mean scores in both time periods, meaning the perception towards competition is worse than in the rest of the territories. On the opposite end, Germany and the European average show the most positive attitudes towards competition on the last EVS wave. Notably, **Euskadi shows the largest change**, dropping from 4.84 to 4.17, signalling a **noticeable shift toward a less negative view of competition**, moving closer to the Nordic-Scandinavian model. Moreover, this more positive perspective is more homogenous, and therefore, shared across the territory.

Table 5.13 Adequacy of competition descriptives by country and time

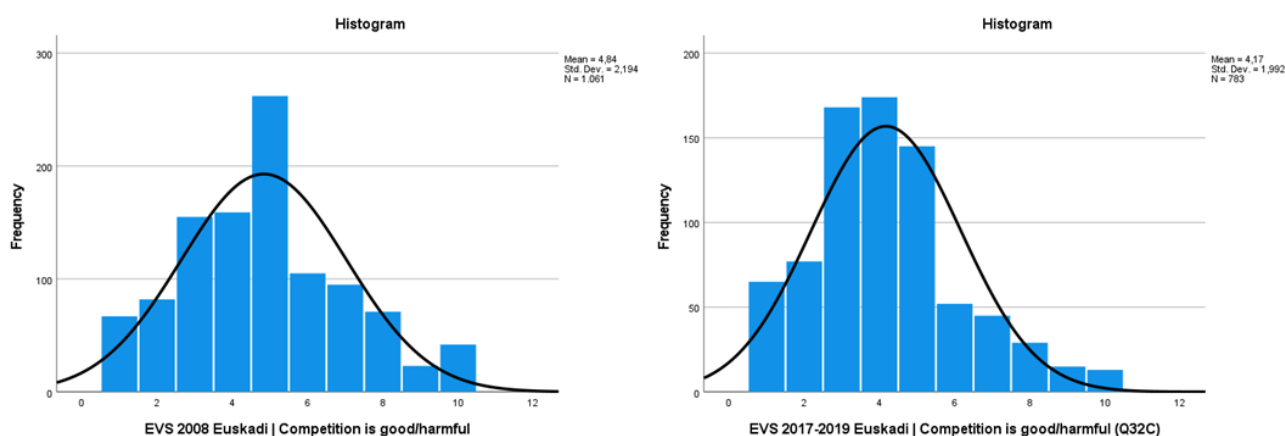
Adequacy of competition	Mean		Std. Deviation	
	2008	2017- 2019	2008	2017-2019
Euskadi	4.84	4.17	2.194	1.992
Finland	4.53	3.98	2.176	1.986
Germany	3.57	3.46	1.953	1.997
Great Britain	3.66	3.80	2.126	2.157
Spain	4.86	4.33	2.253	2.636
Europe	4.02	3.68	2.418	2.340

Notes: (1) Competition is good – (10) Competition is harmful

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

As illustrated in [Chart 5.10](#), the distribution of responses exhibits a higher concentration in the 3, 4, and 5 scores. This suggests that the latest survey wave in the Basque Country evinces a more unified and shared perspective on the concept of competition.

Chart 5.10 Evolution of distribution of adequacy of work



Notes: (1) Competition is good – (10) Competition is harmful

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

From 2008 to 2017-2019, both women and men across most regions show a slight trend toward perceiving competition more positively, as indicated by decreasing mean scores. The shift is generally more pronounced among men, who consistently have a more positive view of competition than female respondents, therefore, **there is a persistent gender gap** in the value about competition, and Euskadi is not an exception.

Table 5.14 Adequacy of competition descriptives by country and gender

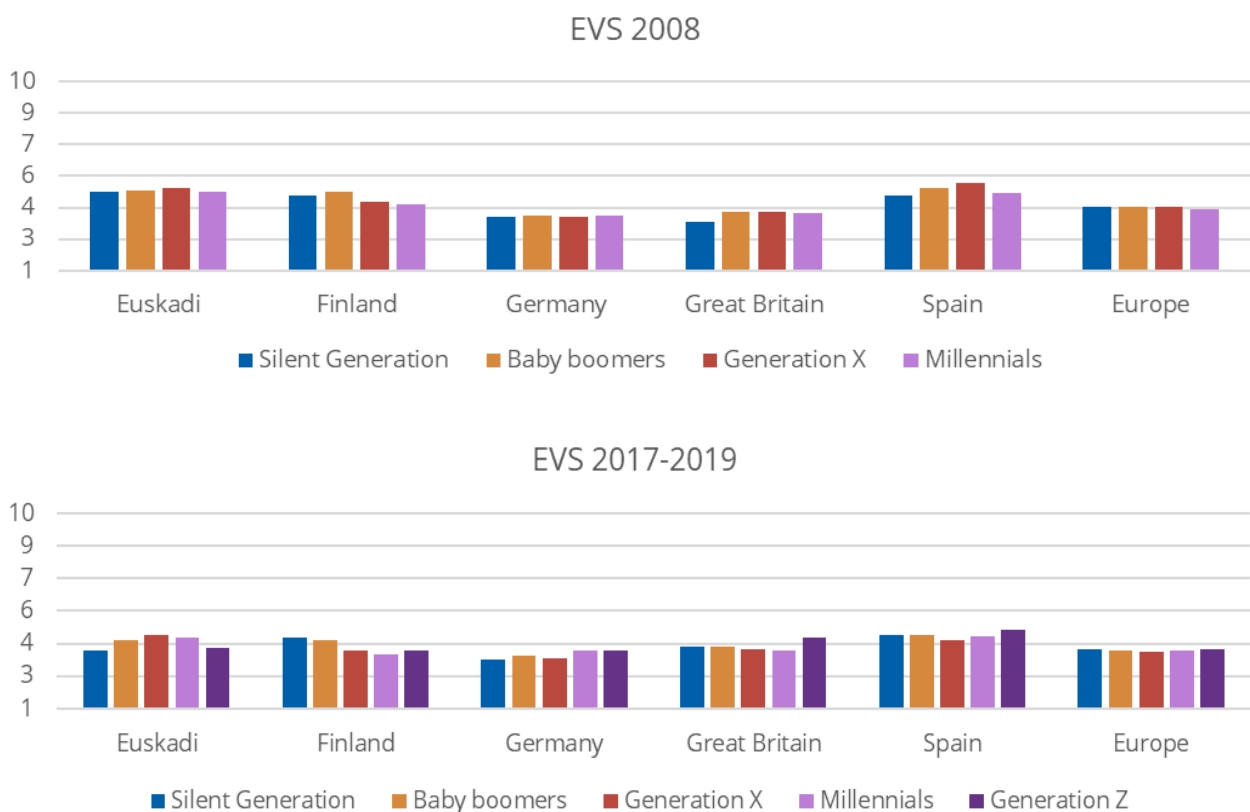
Adequacy of competition	Female (mean)		Male (mean)	
	2008	2017-2019	2008	2017-2019
Euskadi	5	4.32	4.67	4.02
Finland	4.68	4.18	4.38	3.77
Germany	3.65	3.71	3.49	3.23
Great Britain	3.79	4.02	3.47	3.51
Spain	4.90	4.53	4.81	4.09
Europe	4.14	3.83	3.87	3.49

Notes: (1) Competition is good – (10) Competition is harmful

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

From a generational perspective, no consistent pattern has been identified across generations and geographical locations. In Euskadi, differences were not very high among generations in 2008, with a slight worst perspective about competition among middle generations. This pattern has deepened in the region a decade after, with a more pronounced shift of oldest and youngest generations towards considering competition good. The pattern is the opposite of Spain, Great Britain and the European average in the last available data.

Chart 5.11 Adequacy of competition descriptives (mean) by country and generation



Notes: (1) Competition is good – (10) Competition is harmful

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

Individual vs state responsibility for providing livelihoods

Box 7 EVS | Individual vs state responsibility for providing livelihoods

How would you situate yourself in the following scale?

(Scale 1-10). (1) People should take on individually more responsibilities for providing for livelihoods for themselves --- (10) The State should assume more responsibilities in terms of ensuring providing livelihoods for everyone.

Despite the design of the competitiveness for wellbeing model goes beyond what is conceived as welfare states, the latter is without a doubt an important feature of the desired model towards the future. The level of individualism or collectivism is regarded as one of the cultural dimensions with highest economic effect (see [Table 2.2](#) in section 2.1.4). Thus, the following section analyses the values regarding how much responsibility of providing for livelihoods should rest on individuals and how much on States according to respondents.

There is a **growing preference for state responsibility in most countries over the time**, as is visible in [Table 5.15](#), most likely driven by socio-economic changes, crises, and public discourse around welfare. Spain demonstrates the most pronounced inclination towards state responsibility (6,11 over 10), followed by Euskadi, which is closer to the European average. The Scandinavian and Anglo-Saxon model show the highest preference over individual responsibility. Notwithstanding the above, all territories recognise a shared responsibility between the individual and the State (values among 4,68 and 6,11). The level of homogeneity for this value has remained with small changes.

Table 5.15 Individual vs state responsibility for providing livelihoods descriptives by country and time

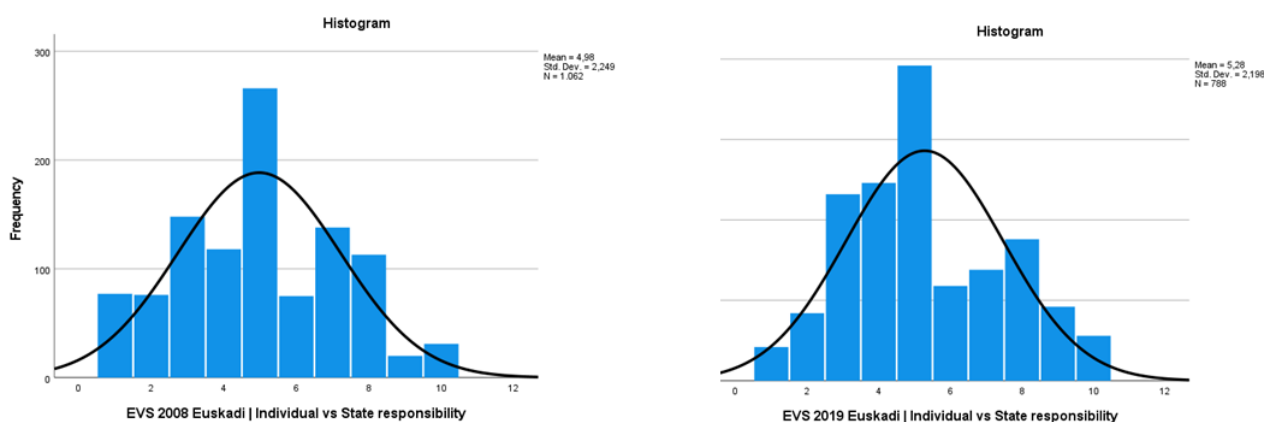
Individual vs State responsibility	Mean		Std. Deviation	
	2008	2017- 2019	2008	2017-2019
Euskadi	4.98	5.28	2.249	2.198
Finland	4.55	4.68	2.425	2.247
Germany	4.28	5.16	2.525	2.507
Great Britain	3.83	4.69	2.339	2.446
Spain	5.59	6.11	2.247	2.691
Europe	4.99	5.10	2.764	2.729

Notes: (1) More individual responsibility for their livelihoods --- (10) More State responsibility for livelihoods

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

An examination of the evolution of value distribution over time reveals that the distribution has remained relatively stable. **The majority of the population remains in a neutral position** between the individual and the state.

Chart 5.12 Evolution of distribution individual vs state responsibility



Notes: (1) More individual responsibility for their livelihoods --- (10) More State responsibility for livelihoods
Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

From a gender perspective (see Table 5.16), across all regions and timeframes, women consistently show a stronger preference for state responsibility than male respondents. In Euskadi, the gender gap has reduced, whereas in Spain, and particularly, in Finland the gap has widened.

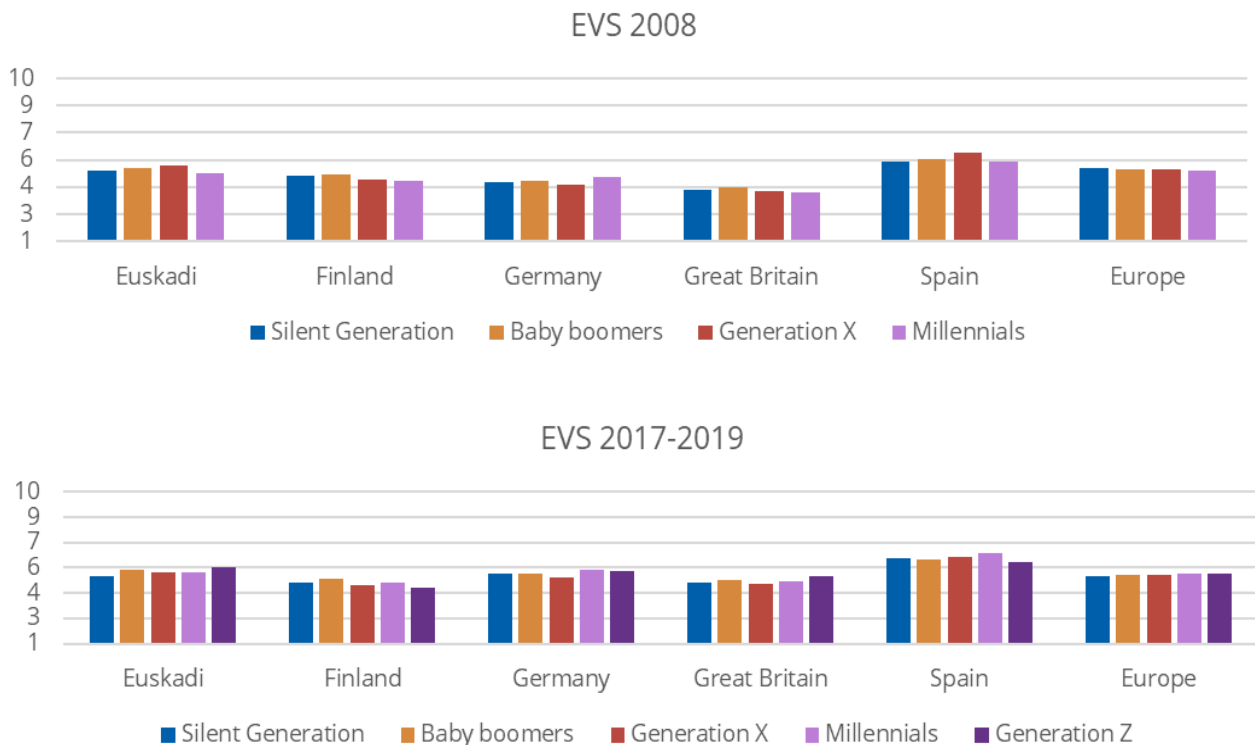
Table 5.16 Individual vs state responsibility for providing livelihoods descriptives by country, time and gender

Individual vs State responsibility	Female (mean)		Male (mean)	
	2008	2017-2019	2008	2017-2019
Euskadi	5.14	5.35	4.81	5.20
Finland	4.58	4.94	4.52	4.40
Germany	4.34	5.24	4.21	5.07
Great Britain	3.88	4.75	3.77	4.61
Spain	5.67	6.21	5.50	5.99
Europe	5.10	5.23	4.84	4.94

Notes: (1) More individual responsibility for their livelihoods --- (10) More State responsibility for livelihoods
Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

From a generational perspective (see Chart 5.13), no clear pattern emerges that is similar in the different comparable territories, neither in 2008 nor a decade later. Although there are generational differences, we see that there is a certain homogeneity between generations. In the Basque Country, it can be observed that, in the last wave, the youngest generation gives most responsibility to the State, similar to the European average and Great Britain. On the other hand, the Silent generation (oldest generation) considers that there should be greater individual responsibility.

Chart 5.13 Individual vs state responsibility for providing livelihoods descriptives (mean) by country, time and generation



Notes: (1) More individual responsibility for their livelihoods --- (10) More State responsibility for livelihoods
Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

Preferred welfare state provisions

Box 8 EVS | Preferred welfare state provisions

What should a society provide? (Q62): the elimination of great inequalities of income among citizens; guarantee basic needs of everyone in terms of food, housing, education and health; recognition of people for their merits; protection against terrorism.

Scale 1-4. (1) Very important – (2) Quite important – (3) Not very important - (4) Not at all important.

Very connected with whether the responsibility is on individuals or States when constructing the welfare model of a country is to analyse what a society should provide, also an essential vision value in this process. The question regarding the preferred welfare state provisions was not included in the 2008 edition of the EVS, making longitudinal comparisons unavailable. Instead, the analysis focuses on gender and generational differences within the 2017-2019 dataset, and a comparison with other welfare culture models.

For the territory of **Euskadi, the most valued provision is the guaranteeing of basic needs of citizens**, followed by the reduction of inequalities, the protection against terrorism and the recognition of merits. Therefore, the territorial values of the Basque region show a highly social and redistributive component. The order of prevalence of the region is quite different from the majority of the territories, which (despite varying levels of importance) order the provisions in a different way: first they prioritise security, followed by the guaranteeing basic needs, the recognition of merits and lastly, the reduction of inequalities (in Finland, Germany, Great Britain, and Europe). Spain is in between the majority and Euskadi, prioritising the protection against terrorism, followed by the guaranteeing of basic needs, but the reduction of inequalities is ahead of the recognition of merits.

Table 5.17 Preferred welfare state provisions descriptives by country

Preferred welfare state provisions	Mean				Std. Deviation			
	Reduce inequalities	Guarantee basic needs	Recognise merits	Protection terrorism	Reduce inequalities	Guarantee basic needs	Recognise merits	Protection terrorism
Euskadi	1.49	1.23	1.66	1.57	0.576	0.448	0.715	0.689
Finland	2.05	1.36	1.91	1.21	0.749	0.564	0.696	0.485
Germany	2.03	1.26	1.59	1.21	0.755	0.466	0.621	0.465
Great Britain	2.01	1.33	1.58	1.16	0.736	0.515	0.602	0.409
Spain	1.55	1.36	1.79	1.34	0.606	0.568	0.742	0.573
Europe	1.92	1.38	1.61	1.26	0.785	0.569	0.662	0.526

Notes: Scale 1-4. (1) Very important – (2) Quite important – (3) Not very important - (4) Not at all important.

Source: Own elaboration based on EVS, 2017-2019, and EVS, 2019 Basque Country

The fact that the majority of territories prioritise security is indicative of the enduring primacy of security concerns at the origin of the state. Despite the emergence of alternative welfare models in specific locations, which may have emphasised values such as equality or freedom, the pursuit of security and peace remains a fundamental rationale for the formation of states. In the contemporary era, it remains as topical as before.

From a gender perspective (see [Table 5.18](#)), a small gender gap is visible in Euskadi (lower than in other comparable territories), although the order of prevalence does not vary. We also observe a bias of female respondents to give more important to all qualities than men.

Table 5.18 Preferred welfare state provisions descriptives by country and gender

Preferred welfare state provisions	Female				Male			
	Reduce inequalities	Guarantee basic needs	Recognise merits	Protection terrorism	Reduce inequalities	Guarantee basic needs	Recognise merits	Protection terrorism
Euskadi	1.48	1.20	1.64	1.54	1.50	1.26	1.68	1.60
Finland	1.95	1.31	1.91	1.16	2.17	1.41	1.90	1.28
Germany	1.99	1.25	1.58	1.20	2.06	1.28	1.60	1.23
Great Britain	1.98	1.29	1.58	1.14	2.04	1.37	1.58	1.18
Spain	1.53	1.34	1.81	1.34	1.57	1.38	1.76	1.35
Europe	1.87	1.36	1.60	1.24	1.97	1.41	1.62	1.29

Notes: Scale 1-4. (1) Very important – (2) Quite important – (3) Not very important – (4) Not at all important.

Source: Own elaboration based on EVS, 2017-2019, and EVS, 2019 Basque Country

From a generational perspective (see [Chart 5.14](#)), it can be observed that the order of prevalence among the prioritised provisions remains relatively consistent across generations, with only minor fluctuations. For instance, in Euskadi the youngest generation gives less importance to the security quality, most likely due to having born in peaceful times, by equating it with the recognition of merits. On the opposite end, the oldest generation in Euskadi, prioritises more security over other qualities, meaning it takes the second place in importance, only after the guaranteeing of basic needs. The rest of the generations follow the same pattern. Furthermore, significant generations alterations are also not found in the rest of the comparable territories between their mean and generational comparison analysis.

Chart 5.14 Preferred welfare state provisions (mean) by country and generation



Notes: Scale 1-4. (1) Very important – (2) Quite important – (3) Not very important – (4) Not at all important.

Source: Own elaboration based on EVS, 2017-2019, and EVS, 2019 Basque Country

5.3.1.2. Territorial and leaders' values comparative

After having analysed some examples of territorial vision values, a comparison¹⁹ of the values of the individuals who were leading the initiative and territorial values is performed next, in order to understand the impact of their values in the resulting vision.

Post materialism index

The analysis of the emerging post-materialist index of the leadership team revealed that some of the potential qualities were not selected by the leaders due to the reduced number of leaders, particularly in the initial set of questions. Nevertheless, despite the variation in the percentage, it can be observed that the **leaders align to a high extent with the territorial ranking in both questions**, in the areas where data is available.

In the first group of questions, leaders show a high homogeneity option for only two qualities, with the same amounting percentage. The highest priority was given to the postmaterialist value of "seeing that people have more say about how things are done at their jobs and in their communities" (since it was chosen by a higher percentage as the first option). The second place goes to the materialist value of a "high level of economic growth". None of the other two qualities have been selected by any of the leaders.

Table 5.19 Territorial and leader's post materialism index values – Part 1

	Leaders				Territorial	
	1 st place	2 nd place	Sum	Ranking	Sum	Ranking
High level of economic growth	33.3	66.7	100	2°	76.5	2°
Making sure this country has strong defence forces	-	-	-	-	6.5	4°
Seeing that people have more say about how things are done at their jobs and in their communities	50	50	100	1°	83.9	1°
Trying to make our cities and countryside more beautiful	-	-	-	-	32.3	3°

Notes: The data shows the percentage of time respondents chose the quality

Source: Own elaboration based on EVS 2019 Basque Country, and leader's EVS

Regarding the second set of questions, leaders also opt for postmaterialist values as their top choices, starting with "giving people more say in important government decisions" together

¹⁹ All territorial vision values will be analysed and compared with leaders' values, except for the individual against state responsibility value.

with “protecting freedom of speech”. The third place goes to “maintaining order in the nation” and lastly, “fighting rising prices”. The third and fourth positions are the opposite at the territorial level.

Table 5.20 Territorial and leader’s post-materialism index values – Part 2

	Leaders				Territorial	
	1 st place	2 nd place	Sum	Ranking	Sum	Ranking
Maintaining order in the nation	33.3	-	33.3	3º	35.5	4º
Giving people more say in important government decisions	66.7	33.3	100	1º	62.3	1º
Fighting rising prices	-	16.7	16.7	4º	46.9	3º
Protecting freedom of speech		50	50	2º	55.4	2º

Notes: The data shows the percentage of time respondents chose the quality

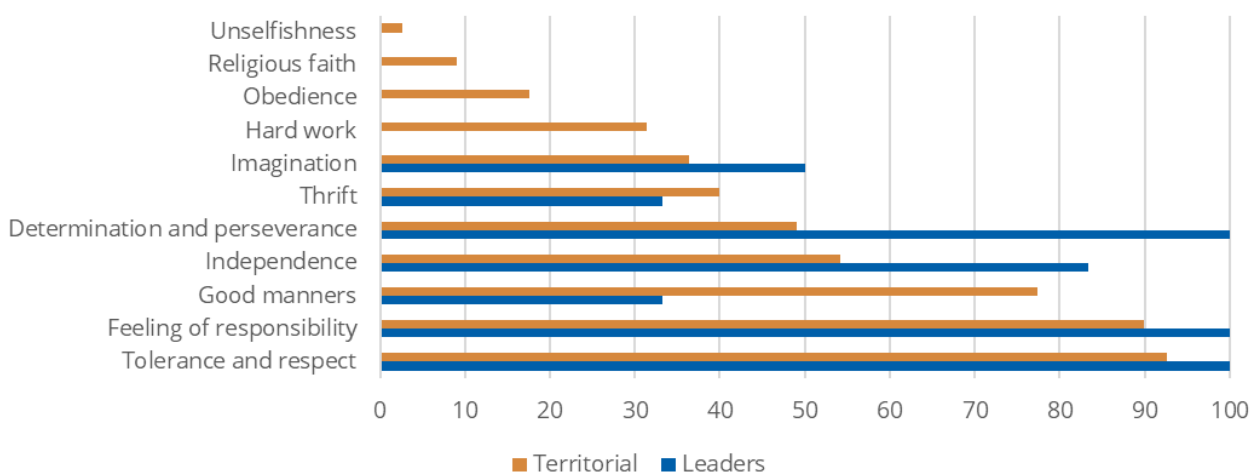
Source: Own elaboration based on EVS 2019 Basque Country, and leader’s EVS

The result that the most important qualities selected by the leadership team are collaborative governance (in both public policy and community governance), economic growth and freedom of expression is highly **consistent with the launch of a shared vision initiative** focused on the competitiveness for wellbeing.

Preferred values to be transmitted to future generations

With regard to the values that are important to pass on to children at home, [Chart 5.15](#) shows how values mentioned by the leaders correspond to the seven most important values at the territorial level. The fact that there is a small number of leaders and that each one could only choose five values to transmit has meant that there are values that have not been prioritised, and they coincide with those that are also the least valued at territorial level (hard work, obedience, religious faith and unselfishness). We can therefore see that **leaders also represent common values in this respect.**

Chart 5.15 Territorial and leaders' preferred qualities that children should learn at home (%)



*Notes: The data shows the percentage of time respondents chose the quality
Source: Own elaboration based on EVS 2019 Basque Country and leader's EVS*

In terms of the values to be prioritised, however, there is consensus among the leaders as to the importance of three values. The first two values, 'tolerance and respect' and 'sense of responsibility', are in alignment with the most prioritised values at the territorial level. However, the third value, 'Determination and perseverance', which is essential for leaders, is ranked fifth at the territorial level. The value of 'Independence' is of greater importance to leaders (ranked fourth at the territorial level). Interestingly, 'Imagination', which at the territorial level is the seventh value, is ranked fifth for leaders, followed by the value 'Thrift' and finally 'Good manners', which is given less value than at the territorial level. It is evident that the leaders in question exhibit a greater proclivity towards values associated with work, perseverance, and independence, when compared to the territory.

Adequacy of competition

Leaders perceive competition as a much better value than the territory or region, and this value is also quite homogeneous among the leadership group. The prevalence of this value may be influenced by organisational values, for example in the research team that belonged to a competitiveness institute, and also on the side of the government team, representing the department of economic development, where competitiveness is perceived from a more positive perspective.

Table 5.21 Territorial and leaders' adequacy of competition value

	Adequacy of competition	
	Mean	Std. Deviation
Territorial	4.17	1.992
Leadership	2.67	0.516

Notes: (1) Competition is good – (10) Competition is harmful

Source: Own elaboration based on EVS 2019 Basque Country and leader's EVS

Preferred welfare state provisions

In terms of the qualities that society should provide, there are notable discrepancies between the views of the leaders and those of the territory. Leaders align with the territorial level by giving the most importance to guaranteeing basic need. This view is homogenous among the entire leadership team. Next there are discrepancies among the leadership team and the territory. Leaders prioritise security next (protection against terrorism), which has the third place on importance at territorial level. Next is the reduction of inequalities and lastly, the recognition of merits, which is also the last at the territorial level.

Table 5.22 Territorial and leaders' preferred welfare provisions

	Reduce inequalities	Guarantee basic needs	Recognise merits	Protection terrorism
Mean				
Territorial	1.49	1.23	1.66	1.57
Leaders	1.83	1	2.17	1.67
Std. Deviation				
Territorial	0.576	0.448	0.715	0.689
Leaders	0.753	0	0.408	0.816

Notes: Scale 1-4. (1) Very important – (2) Quite important – (3) Not very important – (4) Not at all important.

Source: Own elaboration based on EVS 2019 Basque Country and leader's EVS

5.3.2. Qualitative perspective

The following section presents a qualitative analysis of the vision values as represented in the Euskadi 2040 process. The subsequent table illustrates the dimensions and sub-dimensions that will be subjected to analysis.

Table 5.23 Vision values qualitative analysis overview

Category	Dimension	Subdimension	Logic
Typology of values	Vision values	Preferable values	Deductive
		Preferable values content	Deductive
		Vision characteristics	Inductive

Source: Own elaboration

As realised for visioning values, the first step is a Co-Occurrence Analysis in order to understand the significance of the vision values throughout the process, as well as their distribution in accordance with the role of the individuals (leaders or participants) have in the process. Territorial role is employed to reference the outcomes or resulting vision values.

Table 5.24 Vision values citation distribution by role in the process

	Preferable values	Preferable values content	Vision characteristics	Vision values
Leaders (total = 113) (100%)	17 (15%)	2 (1.8%)	8 (7.1%)	27 (23.9%)
Participants (total = 362) (100%)	41 (11.3%)	162 (44.7%)	24 (6.6%)	227 (62.70%)
Territorial (total =66) (100%)	13 (19.7%)	49 (74%)	1 (1.5%)	63 (95%)
Sum of citations	66 (20%)	229 (69.4%)	35 (10.6%)	330 (100%)

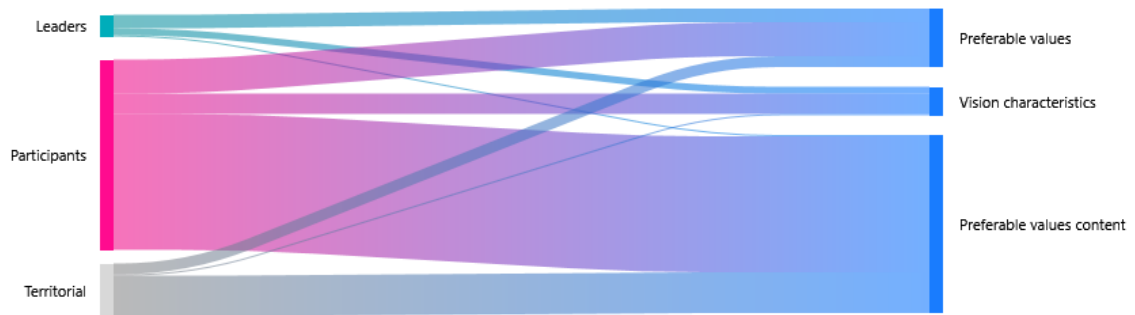
Note: Documents were obtained between September 2021 and November 2024

Source: Own elaboration based on Atlas.ti

As Table 5.24 shows, from a quantitative perspective of the qualitative analysis, it can be concluded that the majority of discussion has been focused on preferable values content (69.4%), followed by preferable values (20%), and lastly, vision characteristics (10.6%). Furthermore, **participants give proportionally more importance to vision values than leaders**, as they mean more than half (62.7%) of their total references, and less than a quarter

(23.9%) of leader's. Therefore, participants have played a predominant role in vision values statements. Moreover, logically, vision values are what is most reflected in the resulting vision, being 95% of total references at the territorial level.

Figure 5.3 Vision values and process role Sankey diagram



Source: Own elaboration based on Atlas.ti

Lastly, there is also a high co-occurrence between vision values (particularly content-related) and vision-action values; more co-occurrence than with visioning values.

5.3.2.1. Leader's vision values

In the more detailed examination of the vision values espoused by the leadership team, we will distinguish between their conceptualisation of the characteristics of an ideal vision and the content of the vision itself, including the preferred values and their evolution.

Regarding vision characteristics, the leadership team understands a vision must be *"of interest of the citizens and easy to comprehend"* (Doc 6:4). In addition, a vision should reflect the *"distinctive character of the territory"* (Doc 13:4), be open and adaptable to different agents in the territory and remain under constant revision *"not to die the moment it is presented"* (Doc 17:6). It is perceived that leaders are not seeking to impose a particular vision; rather, they are seeking to establish a flexible framework within which a shared narrative can be developed. This is evidenced by the following statement:

"It is not about proposing the vision as an obligatory ingredient, but as a sauce that can accompany all dishes." (Doc 17:11)

As for the preferable values projected, starting by the title, the vision reflects about a model of competitiveness for wellbeing. Both concepts are understood by the leadership team as compatible and mutually reinforcing:

"I don't understand the dichotomy between competitiveness and wellbeing. I understand the social and economic dimension of wellbeing" (Doc 12:9)

"Competitiveness is a necessary but not sufficient condition for wellbeing" (Doc 12:10)

From the outset, the vision was formulated in terms of dimensions, as detailed in Chapter III (see 3.2.2.5 for reference). The following Table 5.25 illustrates the evolution of the co-definition

of the Euskadi 2040 Vision dimensions within the leadership team. It can be observed that the projected content follows a consistent trajectory, with the majority of debate occurring around the naming of the various dimensions and the criteria for categorising them as such. From the perspective of the political leadership team, the dimension's measurability was a pivotal consideration as described during the visioning values analysis.

Table 5.25 Leadership preferable values evolution

Academic leadership dimensions	Political leadership dimensions (building on first proposal)	Joint leadership proposal
<i>Economically sustainable and innovative</i>	<i>Prosperous</i>	<i>Prosperous</i>
	<i>Innovative</i>	<i>Innovative</i>
<i>Green</i>	<i>Green</i>	<i>Green</i>
<i>Cohesive</i>	<i>Inclusive</i>	<i>Inclusive</i>
<i>Engaged</i>		<i>Rooted and engaged</i>
<i>Attractive and responsibly connected</i>	<i>Connected</i>	<i>Connected</i>
	<i>Attractive</i>	

Source: Own elaboration

The joint leadership proposal results in a number of dimensions that can be considered generic, up to a point, similar to other futures thinking exercises as the Futures Generations Act initiative in Wales²⁰. This prompted a debate on the universality of the vision or its local character, on which the leadership team took the following position:

"It seems to be an obvious document for everyone to sign. But if there are people who "see things", maybe it's not so obvious." (Doc 28:7)

The dimensions were initially conceptualised as a hexagon, although there was some debate as to whether all dimensions should be positioned within the same range (Doc 51:14). Ultimately, however, it was decided not to categorise them in order to reflect another crucial aspect for the leadership team: the systemic character of the vision, and mutual interdependence of the dimensions:

"One of the uniqueness of this vision is that it must be seen in a systemic view." (Doc 84:9)

²⁰ It projects a Wales that is "prosperous", "resilient", "healthier", "more equal", "cohesive communities", "vibrant culture and thriving Welsh Language" and "globally responsible"(see Welsh Government, 2021).

5.3.2.2. Participant's vision values

Participants of the Euskadi 2040 visioning process projected certain characteristics for a vision, that are summarised in the following table:

Table 5.26 Summary vision characteristics values by participants

Vision adjectives	Statements
Demonstrating positioning / direction	<i>"High hedging vision, but risk that placing all bets can lead to 'coffee for all'. Therefore, it is important to put the emphasis somewhere (...). Emphasis on which elements is marked by political sensitivity." (Doc 36:1)</i> <i>"Some competitiveness challenges require political decisions and positionings." (Doc 38:1)</i> <i>"It is well defined where we want to go, but not so much how we are going to get there. If the how is not well defined, there is a risk that the vision will be something purely aesthetic." (Doc 36:5)</i> <i>"It is important to define the scope of the initiative (economic development or more global) in the working team, and to adapt the figure of a shared agenda according to the scope agreed, giving more room for projects in other areas." (Doc 79:3)</i>
Unique	<i>"What I am missing is the uniqueness. This feels a little bit, a template that would work in a lot of places. You still need to colour it in your own colours." (Doc 84:1)</i> <i>"If you erase "Euskadi" and you give it to a university professor, asking ¿what autonomous community is it? I am not sure if they would be able to respond" (Doc 87:2)</i>
Realistic	<i>"Careful with maximalist statements, because there is a risk of not being able to achieve those maximums." (Doc 39:1)</i>
Consensual	<i>"I have said that some of the things that are raised here are very general, but obviously there is a consensus... I will not say that a total consensus can be reached in Basque society on this, but there is a very broad consensus. It is true, consensuses are always more diffuse." (Doc 47:12)</i>
Uniting	<i>"Connecting everyone on a new narrative for a future" (Doc 84:8)</i>
Aspirational and inspirational	<i>"The document is too continuous; the challenges are a compilation of those already existing in the different government plans. A more inspirational and aspirational character is needed: a leading, attractive, supportive, cosmopolitan Euskadi, etc." (Doc 57:4)</i>

"The proposed vision is very flat, unambitious and lacks concreteness. It is not enough to get people's hopes up, because to do so it is necessary to lead the way with a strong narrative." (Doc 72:1)

"How do you inspire people around the vision?" (Doc 84:2)

Source: Own elaboration

Similarly to leaders, one of the main questions made during the process was whether dimensions can all be categorised in the same level, or some have a higher priority to others. Some institutional participants mentioned that the vision dimensions mixed approaches "some are goals and other are means to achieve those goals, such as the "innovative" or "committed" dimensions" (Doc 51:1). This discussion is highly connected with the classification of values made by Rokeach (1973), who distinguishes among instrumental values (i.e. means) and terminal values (i.e. ends or goals) (Tuulik et al., 2016). In parallel, other participants gave value to the systemic character of the vision, and even came up with the metaphor of the Rubik cube for its explanation:

"The vision is like a Rubik's cube. It is not enough to make one side and touching one side impacts on others." (Doc 51:1)

Regarding preferable values, an overwhelming majority of participants agreed with the proposed dimensions and offered suggestions and proposals only about the specific content of these dimensions, namely the definition of the competitive challenges that exist under each dimension.

"The important part is what words mean; not what words are used." (Doc 37:1)

"What this vision says, I believe, can be a shared compass to a large extent" (Doc 47:16)

The exceptions to the majority suggested two major modifications. First, during the interdepartmental visioning process the following was suggested: "An additional dimension, "Capable Euskadi", should be included, as talent is a fundamental challenge for the future" (Doc 75:6) during the interdepartmental contrast. Second, another suggestion put forth by some participants was to substitute the dimension "rooted and engaged" with 'committed', as the term "rooted" might exclude certain collectives due to its cultural connotations.

The category of participants' preferable values content will not be addressed in detail, as it is a too broad category. Given that the objective of the entire process was indeed to enrich the content of the vision with competitiveness challenges, an in-depth examination of the preferred values content, would require a comprehensive account of all the participants' contributions, including numerous redundancies. Instead, the following section will present only an analysis of the interventions made by participants that have been incorporated into the resulting vision.

5.3.2.3. Resulting vision values

The following section presents an analysis of the extent to which the values of the leaders and participants in the process, have been incorporated into the resulting vision.

Regarding preferable values, one alteration has been made with regard to the joint proposal put forth by the leadership team, namely the modification of the dimension "rooted and engaged" to "committed." This modification was made in order to incorporate greater sensitivity and to make the vision more consensual. The suggestion of an additional dimension, such as "capable Euskadi", was rejected on the grounds that the challenge of talent was already adequately reflected in the dimension of 'prosperous' and did not necessitate the creation of a new dimension. In addition, this suggestion was only made by one actor, whereas the rest of participants agreed with the previous joint proposal.

Table 5.27 Evolution into the resulting Euskadi 2040 vision dimensions

Joint leadership proposal	Resulting Euskadi 2040 Dimensions
<i>Prosperous</i>	
<i>Innovative</i>	
<i>Green</i>	
<i>Inclusive</i>	
<i>Rooted and engaged</i>	<i>Committed</i>
<i>Connected</i>	

Source: Own elaboration

The resulting vision adopts the hexagon format, making it explicit that there is no hierarchical relation between dimensions. Frondizi (1956) already warned that it is often difficult to determine the hierarchy of values. The absence of a hierarchical structure among the dimensions can result in value ambivalence (Jacoby, 2006). Furthermore, its systemic character is made explicit, being conscious that acting on one can have an impact on other dimensions.

As for the content of preferable values, the specific contributions by each of the participants that have been included in the vision have been identified in [Table 3.4](#), [Table 3.6](#), and [Table 3.8](#) of the case study chapter. In examining these interventions, several observations can be made. Firstly, the result of the multi-level comparison has been more transversal, with interventions occurring in nearly all dimensions (with the exception of "innovation").

However, in the inter-institutional comparison, there is a discernible tendency to intervene in the sectoral areas for which they are responsible, with a few exceptions. From one perspective, this may appear to be a natural consequence of the role each representative has defined. However, from another viewpoint, it could indicate a potential deficiency in the government's

ability to perceive the complex interrelationships between the various dimensions, and therefore, lack of systemic vision.

Furthermore, the multi-actor contrast reveals a tendency for organisational values to supersede individual values, as the interventions can be linked to the missions espoused by the participating organisations. Modifications from all the contrast processes have been incorporated into the resulting vision, not in the depth that some actors requested, but in those areas where there could be greater consensus. The full overview of the vision statement is included as Appendix V.

5.3.3. Vision values conclusions

The main conclusion of the analysis of the vision values in the Euskadi 2040 process are the following:

From the quantitative analysis, it can be deduced that leaders demonstrate a significant alignment with the territory in the following vision-values:

- **Postmaterialism index:** A mixed postmaterialist positioning is showed by both leaders and the territory in Euskadi, as is common in other territories (Silvestre et al., 2024), but with a postmaterialist orientation. A strong focus is placed on the prioritisation of collaborative governance, or shared decision-making, in multiple spaces, including the work environment, the broader community, and the political sphere. Along with this, a high economic growth and freedom of expression are also highly valued qualities for the desirable future. These values are aligned with the development of a vision on the model of competitiveness for well-being for future generations.
- **Preferred values to be transmitted to future generations:** Both leaders and the territory place strong emphasis on instilling "tolerance" and "responsibility" as core values in younger generations. These values reflect a distinct social orientation, underscoring a commitment to fostering inclusivity and ethical accountability.

However, there are other areas where leaders show less alignment with prevailing territorial values:

- **Adequacy of competition:** Euskadi shows the largest change in the value of competition, signalling a noticeable shift toward a less negative view of competition. Leaders, on the other end, consider competition is good to a greater extent, likely reflecting their organisational values as being a competitiveness research institute and the governmental department for economic development.
- **Welfare Provisions and State Responsibility:** Across Europe, there is a growing preference for state responsibility in welfare provisions. Euskadi ranks second highest (5.28 out of 10) in this regard, trailing only Spain but aligning closely with the European average. When considering societal priorities, Euskadi places a stronger emphasis on meeting basic needs compared to other regions. Complementarily, leaders are more aligned with European norms, where security—particularly protection against terrorism—is considered of high importance, just after the protection of basic needs.

From the qualitative perspective, it was evidenced a notable degree of **homogeneity in the preferred values with regard to the vision dimensions**. The majority of the discussion centred on the definition and consensus-building process regarding the precise content of these dimensions (identified competitiveness challenges). A significant proportion of the **interventions directly resonated with the level of values of participants** (mostly organisational); they referred to the specific challenges linked to the interests represented by their respective organisations; depending on the scope of their organisation, they had more impact on one dimension than on another; for instance, in inter-institutional comparisons, there is a notable tendency for representatives to focus on their sectoral responsibilities, which, while natural given their roles, may also reflect a governmental shortcoming in recognising the interconnectedness of different dimensions and adopting a systemic perspective.

Moreover, no hierarchical relationship is established between the dimensions, and mix instrumental and terminal character (Rokeach, 1973). This aspect is pivotal in determining the translation of the vision into action.

Furthermore, it is latent that **there is already a view of what a vision is for many** territorial actors, including the leaders. Participants projected certain characteristics of vision, which may seem, to a certain extent, dichotomous:

- A vision is realistic, and simultaneously, aspirational and inspirational.
- A vision must set a clear direction and be specific to the territory, but at the same time be uniting and consensual (which requires a certain level of diffusion).

Consequently, in addition to consensus on the content, it is essential to ascertain the desired vision for the territory and to establish a **creative tension and equilibrium between the diverse characteristics projected** by the various actors.

5.4. Vision- action values

The following section presents an analysis of the vision-action values. This typology of values encompasses the values that influence if and how the vision is taken into action, resolving which values need to be applied to specific situations and how two values should be weighted when they collide.

To this end, three thematic areas have been identified based on the Euskadi 2040 process, where more polarised positions were reported among the leaders and/or participants, or they were conceived as dilemmas:

- First, the environmental dilemma refers to the collision between economic growth and environmental protection.
- Second, the work-life balance dilemma refers to the position that work has in our lives in relation to personal time. Work-life balance has been defined as “individual's ability to meet their work and family commitments, as well as other non-work responsibilities and activities” (Thomas, 2021).
- Third, the open and dynamic culture dilemma refers to the collision between being open to other cultures and enhancing them, while preserving local culture and traditions.

In order to dig deeper into those three dilemmas, as vision-action values, a quantitative perspective is adopted through an examination of a select number of values reported in the EVS. This analysis is complemented by a qualitative perspective derived from an examination of the systematisations of the Euskadi 2040 process (see Appendix IV for reference).

5.4.1. Quantitative perspective

To address each of the three dilemmas, a number of questions reflecting values have been selected from EVS. Similarly to the analysis of both visioning and vision values, in the first instance, a territorial analysis is made for the region (from a longitudinal perspective and comparable regions). Afterwards, the descriptives of territory are compared to the values expressed by the leadership group, as a first step to analyse how influential they have been in the process, and resulting shared vision statement and outcomes.

5.4.1.1. Territorial values

Environmental dilemma

The first dilemma analysed will be the environmental dilemma, and the following section provides an in-depth analysis of the values associated with it:

Box9 EVS | Environmental protection vs Economy

“Do you agree or disagree with the following sentence? I would give part of my income if I could be sure that my money would be used to prevent environmental pollution.”

- In the 2018 edition: (1) Completely agree (2) Agree (3) Nor agree nor disagree (4) Disagree (5) Completely disagree (Q56 v199)

- In the 2008 edition: (1) Completely agree (2) Agree (3) Disagree (4) Completely disagree (Q85)

**

“Which of the two is closer to your own point of view? (Q57)

- (1) Priority should be given to environmental protection, even if it leads to slower economic growth and some job losses.
- (2) Priority should be given to economic growth and job creation, even if the environment suffers to some extent.”

The literature on the relationship between economic development and the environment is not unanimous or consistent. Part of the literature argues there is an inverse Kuznetz curve among economic development and quality of environment, meaning higher levels of economic development mean negative impact in the environment, up to a determined point, where higher levels of economic development mean higher environmental quality (Navarro Arancegui, 2024). Nevertheless, many other authors argue that relationship has not been sufficiently empirically tested, nor is it the case for many other environmental indicators (Navarro Arancegui, 2024; Zilio, 2011).

In the absence of a consensus in the existing literature, it is of considerable value to consider which of the values would have priority in the event of a collision, either economic development (or even growth) or environmental protection. The first question (Q56 v199) addressed by EVS, adopts a more personal position, as if personal income would be “sacrificed” for the good of the environment. The second question (Q85) refers to in more general terms.

Prior to undertaking the quantitative analysis, it is necessary to highlight a number of nuances. With regard to the “individual sacrifice”, it should be noted that the response options differ between the two survey waves. In 2008, only four options were provided (strongly agree, agree, disagree and strongly disagree), whereas in 2017-2019, an intermediate option, 'neither agree nor disagree', was introduced. Consequently, an as-is comparison is not possible. The “general sacrifice” question was only added at a later stage; therefore, a longitudinal analysis with 2008 wave is not possible.

In 2008, Euskadi was closer to agreeing with giving part of the personal income for environmental protection than not. Indeed, of the selected comparators, the territory exhibited one of the most pronounced tendencies towards prioritising the environment, only slightly above the European average. However, this view was the least homogeneous among the territories with a deviation close to 1. In the 2017-2019 wave, most of Basque population still agreed with giving part of their income in favour of the environment, more similar to those observed in the other territories, ranking behind the European average and that of Great Britain, and on a par with Germany. The deviation remains the highest in the Basque Country among the territories. This suggests some difficulty in reaching a common vision on the issue.

Table 5.28 Environmental protection vs. personal income descriptives by country and time

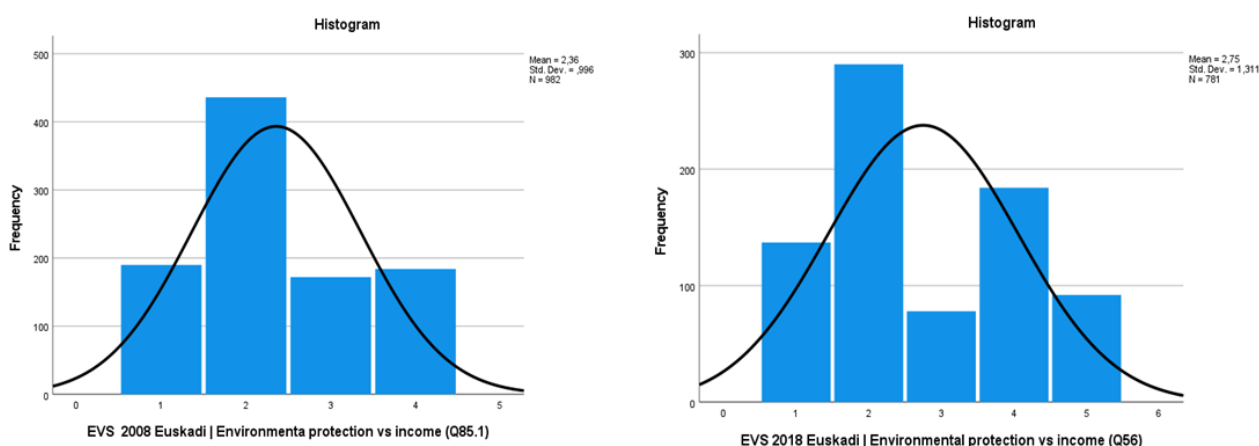
Q56. V199	2008		2017-2019	
	Mean	St. Dev.	Mean	St. Dev.
Euskadi	2.36	0.996	2.75	1.311
Finland	2.69	0.861	2.88	1.122
Germany	2.88	0.886	2.73	1.203
Great Britain	2.66	0.846	2.59	1.025
Spain	2.50	0.885	2.92	1.195
Europe	2.27	0.905	2.65	1.173

Notes: In the 2017-2019 edition: (1) Completely agree with giving part of the income for environmental protection (2) Agree (3) Not agree nor disagree (4) Disagree (5) Completely disagree. In the 2008 edition there is no option for (3) Agree nor disagree.

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

In order to gain a more accurate understanding of the data, it would be beneficial to examine the distribution of the question as showed in the following [Chart 5.16](#). We can observe that in both cases, most people agree with giving part of their income in benefit of the environment. However, whereas in 2008 there was nearly the same amount of people that disagreed or had more polarised positions (completely agree/disagree), a decade after, the proportion of people who disagrees has increased, and there is also a considerable amount of people who remain indifferent. The data of 2018 does not strictly follow the expected pattern of symmetry and even spread around the mean of a normal distribution. This value follows a logic that, in principle, is disabling the emergence of a shared vision in this topic.

Chart 5.16 Evolution of distribution of environmental protection vs. income in Euskadi



Notes: In the 2017-2019 edition: (1) Completely agree with giving part of the income for environmental protection (2) Agree (3) Not agree nor disagree (4) Disagree (5) Completely disagree. In the 2008 edition there is no option for (3) Agree nor disagree.

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

Table 5.29 shows the results for whether the population prefers environmental protection over economic growth and job creation in more general terms. In this value, Euskadi shows preference for the prioritisation of environmental protection; in comparison with the rest of the territories, it shows a middle ground behaviour. Finland and Germany have the highest preference over the environment, followed by the Basque Country, Spain and the European average, and lastly, Great Britain, still shows preference over the environment, but closer to prioritising economic growth. Regarding the deviation, it follows the same order, with Finland having the smallest deviation and Great Britain the highest, but with very slight variation between territories.

Table 5.29 Environmental protection vs. economic growth and job creation descriptives by country and time

Q57	2017-2019	
	Mean	Std. Dev.
Euskadi	1.30	0.460
Finland	1.26	0.438
Germany	1.29	0.453
Great Britain	1.38	0.485
Spain	1.36	0.479
Europe	1.36	0.481

Notes: (1) Priority should be given to environmental protection. (2) Priority should be given to economic growth and job creation
 Source: Own elaboration based on EVS 2017-2019, and EVS 2018 Basque Country

During the last wave, in most countries (except for Spain) female respondents tend to be slightly more willing than male counterpart to give up income for environmental protection (see Chart 5.30). This represents a change from 2008, when results exhibited greater variability from one territory to another. The widest gender gap can be seen in Euskadi and in Great Britain, and the smallest gender gap in Finland and the European average.

Table 5.30 Environmental protection vs. personal income descriptives by country and gender

Q56. V199	2008		2017-2019	
	Female	Male	Female	Male
Euskadi	2.29	2.42	2.68	2.82
Finland	2.70	2.69	2.87	2.88
Germany	2.85	2.91	2.71	2.75
Great Britain	2.71	2.58	2.63	2.74
Spain	2.53	2.46	2.96	2.88
Europe	2.28	2.26	2.65	2.66

Notes: (1) Completely agree with giving part of the income for environmental protection ---- (5) Completely disagree

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

Similarly to the values related to personal economic sacrifice for the environment, female respondents also have a higher preference towards the environment than male respondents if we adopt a more general perspective (over economic growth and job creation), in all countries (except for Great Britain where there is no gender gap), as visible in [Table 5.31](#). The results are not unexpected, as they align with the traditional gender roles that have been socially constructed and in which most of the population has been socialised, with male respondents more oriented towards providing economically and female respondents more concerned with caring over the environment. The between gender variation is not so high (lower than on an individual basis), which may point to the fact that we are finally increasingly breaking down these gender roles.

Table 5.31 Environmental protection vs. economic growth and job creation descriptives by country and gender

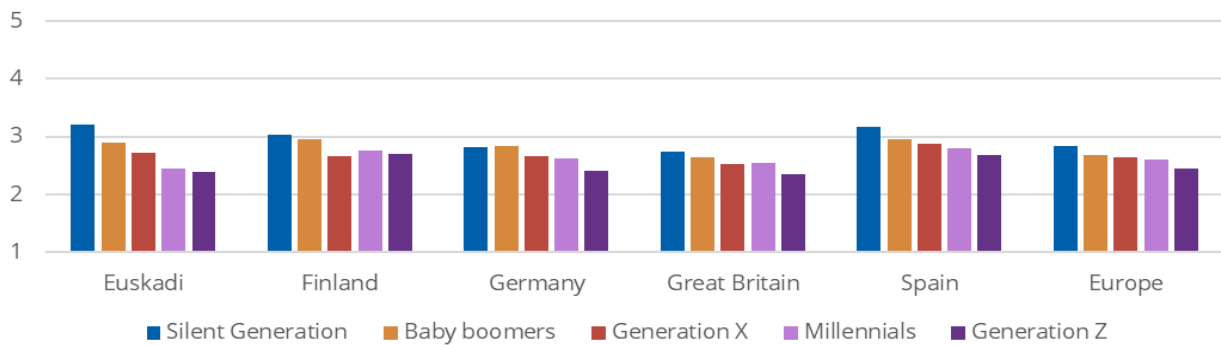
Q57	2017-2019	
	Female	Male
Euskadi	1.29	1.32
Finland	1.23	1.29
Germany	1.26	1.31
Great Britain	1.38	1.38
Spain	1.34	1.38
Europe	1.35	1.37

Notes: (1) Priority should be given to environmental protection. (2) Priority should be given to economic growth and job creation

Source: Own elaboration based on EVS 2017-2019, and EVS 2018 Basque Country

As the following [Chart 5.17](#) shows, from a generational perspective, most countries follow a linear decreasing pattern (except for Finland), meaning that older generations show smaller preference over giving part of their income for environmental protection. This may be attributed to a number of factors, including a lack of environmental awareness and education among older generations, or a perception among older individuals that they are not susceptible to the impacts or threats of climate change. Conversely, this may also indicate a heightened economic vulnerability among older age groups. Further research is required to dilucidated the specific factor explaining it.

Chart 5.17 Environmental protection vs. personal income descriptives (mean) by country and generation (2017-2019)

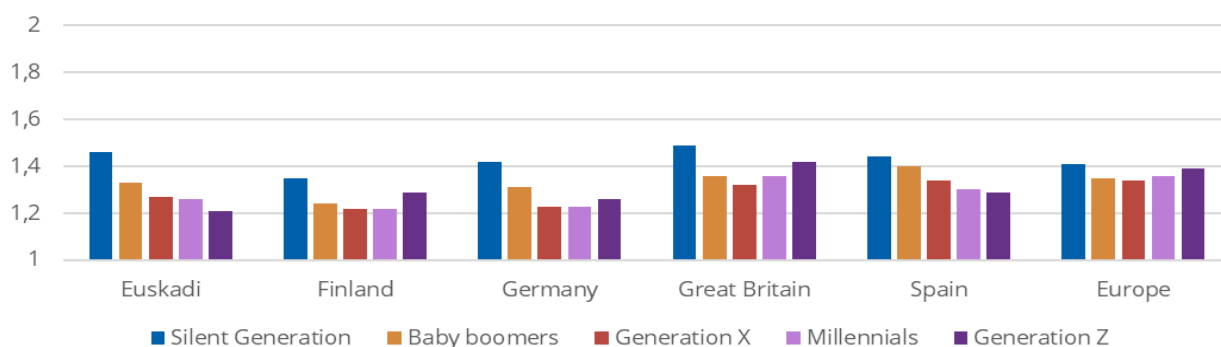


Notes: (1) Completely agree with giving part of the income for environmental protection ---- (5) Completely disagree

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

Regarding the general preference over economic growth and job creation over environmental protection, two patterns are identified: on the one hand, a linear decreasing pattern (seen in Euskadi and Spain), where older generations show a higher preference over economic growth and job creation and the opposite in younger generations. On the other hand, in the rest of the comparable territories (Finland, Germany, Great Britain and the European average) we see a U-form pattern, where the oldest and youngest generations prioritise economic growth and job creation, and the middle age groups are the most pro-environmentalists. The observation that economic issues are of greater concern to older and younger people, respectively, may indicate a heightened dependence of these groups on the economic health of the state, given that they are predominantly students and individuals of retirement age. Furthermore, existing literature has identified a correlation between higher income levels and the adoption of more environmentally conscious values (Paulson & Büchs, 2022).

Chart 5.18 Environmental protection vs. economic growth and job creation descriptives (mean) by country and generation



Notes: (1) Priority should be given to environmental protection. (2) Priority should be given to economic growth and job creation

Source: Own elaboration based on EVS 2017-2019, and EVS 2018 Basque Country

Work-life balance dilemma

The following section provides a more detailed examination of the values associated with the dilemma of balancing work and personal life:

Importance of life aspects

Box 10 EVS | Importance of life aspects

Q1. Please tell me the degree of importance that each of these aspects have in your life:

Work, Family, Friends and acquaintances, Free time, Politics and Religion.

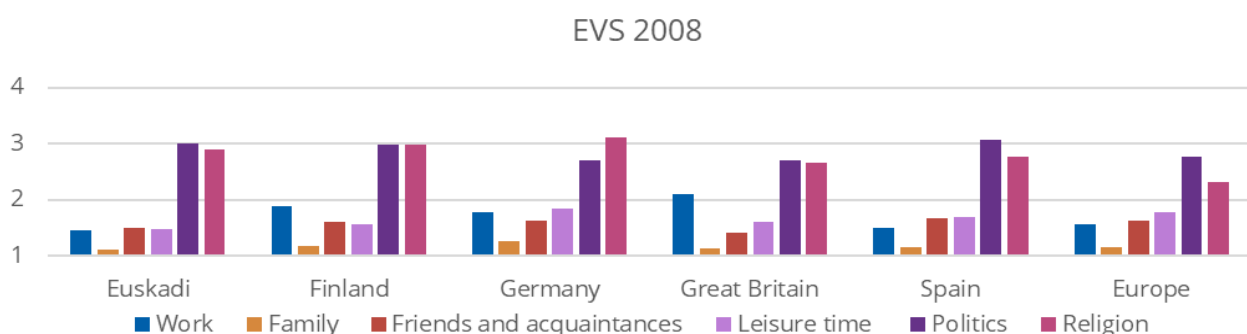
(1) Very important, (2) Quite important, (3) Not very important, (4) Not important

The following section will present the findings of the initial question posed by the EVS, which seeks to ascertain the relative importance placed on a range of life aspects, including work, family, friends and acquaintances, leisure time, politics and religion. The degree of importance attributed to each of these aspects also provides insight into how they are prioritised in people's lives.

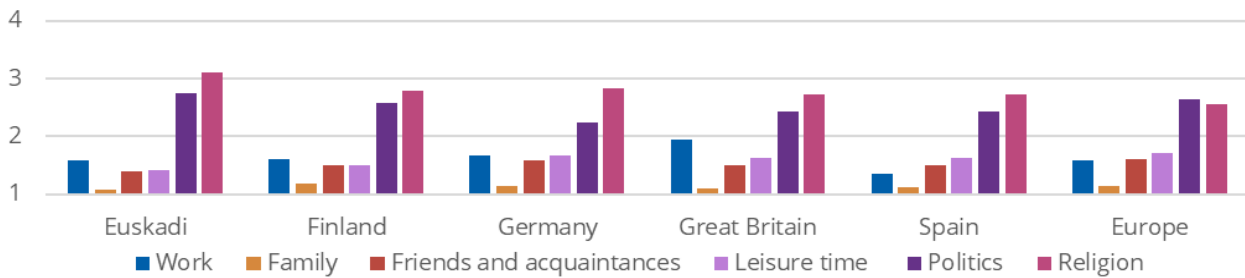
A review of the Basque Country reveals a temporal evolution in the prioritisation of aspects of life. The family unit remains the primary social institution for the population, both historically and in the present. Subsequently, work was identified as the second most important life aspect for the Basque population in 2008, although this was closely followed by leisure time and social interactions with friends and acquaintances. A decade later, **the decline in the importance of work and the increase in the importance of free time have resulted in a shift in the order of priority.**

In 2018, family, friends, free time, work, and then politics and religion emerged as the most significant factors (the latter two having also experienced a change in order of importance over the past decade). That being said, in relation to the importance of work in 2008 the values were much more homogeneous than in the last wave, going from a deviation of 0.611 to a deviation of 0.899 in 2018.

Chart 5.19 Importance of life aspects descriptives (mean) by country and time



EVS 2017-2019



Notes: Scale (1) Very important (2) Important (3) Not very important (4) No at all important

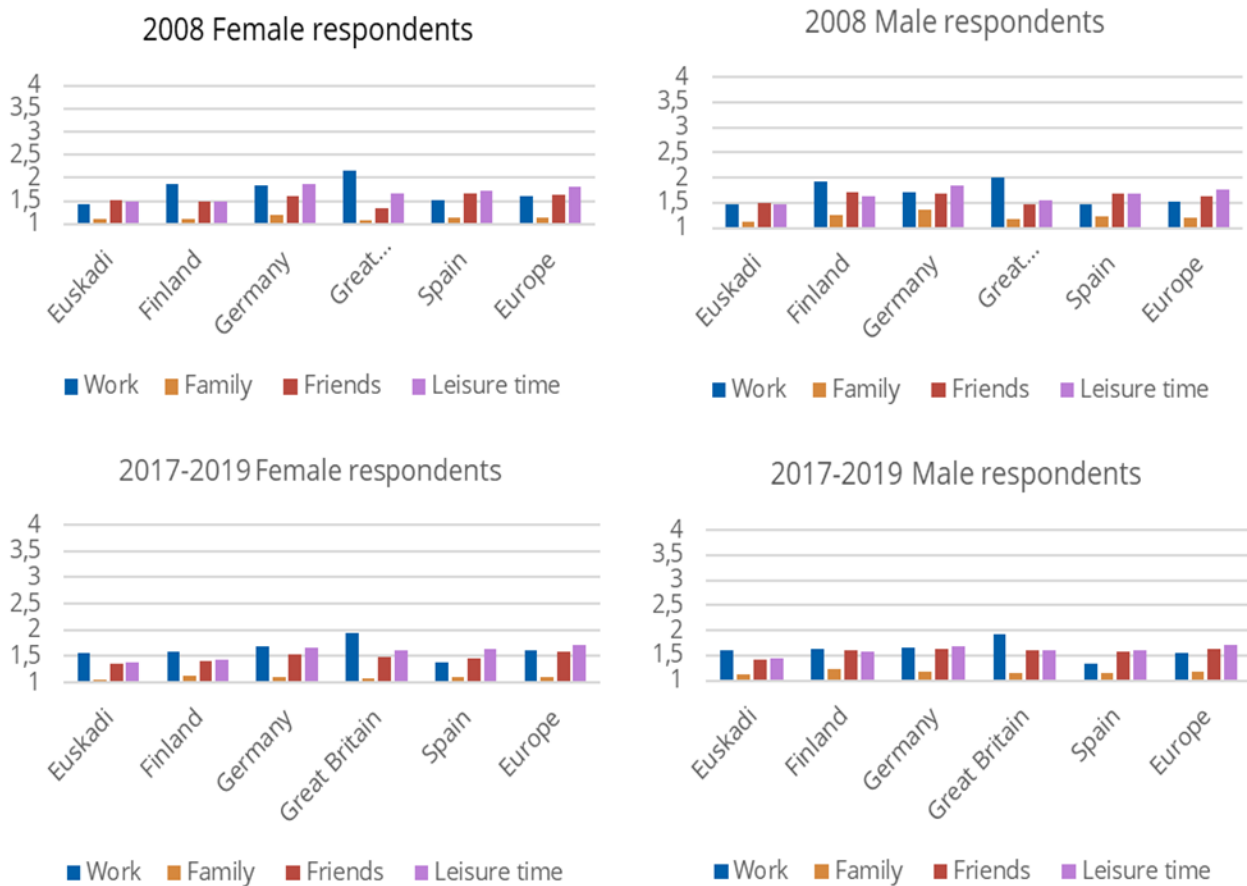
Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

In comparison with other territories, the Basque Country placed a greater emphasis on work than Finland, Germany and the United Kingdom. The values observed in the Basque Country were more similar to those seen in Spain and the European average. It is noteworthy that, with the exception of the European average, where the value remained unchanged, work has assumed greater importance in the remaining territories (except for Euskadi). In all territories, family is identified as the most important aspect, while politics and religion are regarded as the least important. However, the relative importance of these factors varies across territories. In the latest wave, politics and religion were identified as the least important in that respective order (except for the European average where religion held a higher importance than politics).

Due to the higher relevance of the aspects of work, family, friends and leisure time for the dilemma emerged in the process only those four aspects will be analysed following (i.e. politics and religion will be excluded from the analysis), from a gender and a generational perspective.

From a gender perspective, we can see a tendency of female respondents to rate most aspects of life as more important than male respondents in Euskadi, particularly for work and leisure time, and specially in 2017-2019. However, the order of importance remains the same for both genders. Euskadi generally places more importance on work and family compared to northern European countries like Finland and Germany aligning more with Spain. Friends and leisure are less important in Euskadi, especially for women, similarly to Finland, but contrasting with territories like Spain and Germany where these areas are rated higher.

Chart 5.20 Importance of life aspects descriptives (mean) by country and gender

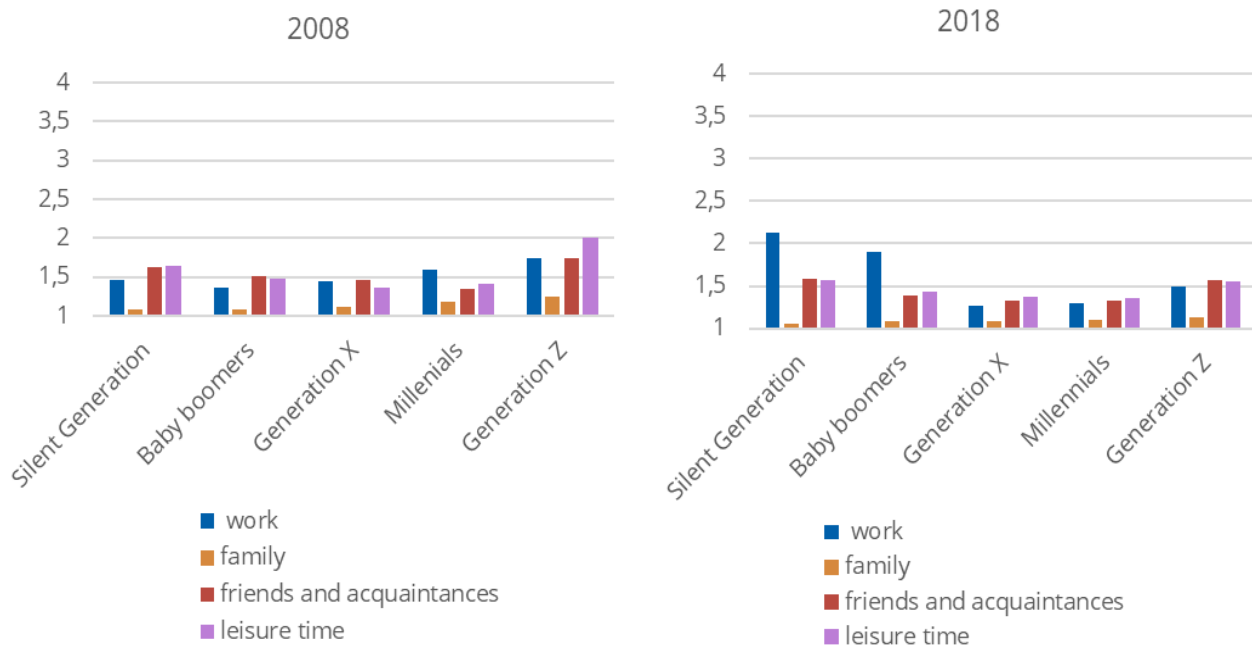


Notes: Scale (1) Very important (2) Important (3) Not very important (4) No at all important

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

From a generational perspective (see [Chart 5.21](#)), we can see that a large part of the decreasing of importance of work is seen in the oldest generations, particularly Baby boomers and Silent generation, most likely because they are in retirement or close to retirement age. Similarly, it is notable that the importance of leisure time has increased particularly in Generation Z (the youngest cohort) in the last wave.

Chart 5.21 Importance of life aspects in Euskadi evolution (mean) by generation



Notes: Scale (1) Very important (2) Important (3) Not very important (4) No at all important

Source: Own elaboration based on and EVS 2008, 2018 Basque Country

Importance of job qualities

Box 11 EVS | Importance of job qualities

Q11. Here are some aspects of a job that people say are important. Please look at them and tell me which ones you personally think are important in a job: good income, opportunities to take initiative, extensive holidays, job where you think you can achieve something, job with responsibilities.

(1) Mentioned as important (2) Not mentioned

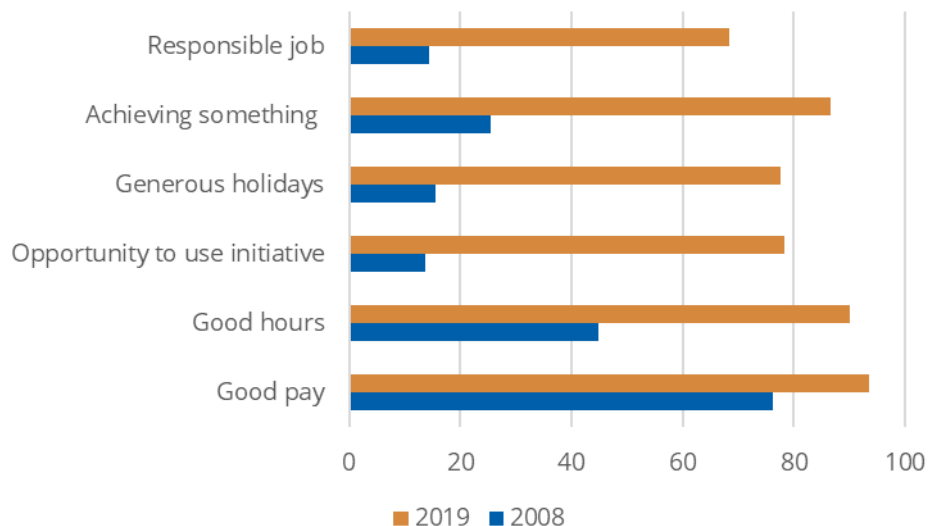
Once the importance of work has been established, the following value reflects the particular qualities that are important in a job. Before entering a profound exploration of the preferences, it must be noted that the question was not formulated in the same manner in both EVS editions that are analysed. The 2008 questionnaire included a much more extensive list of job qualities that respondents could mention (such as, having nice colleagues, a job that is useful for society, an interesting job, to learn new skills, where you can conciliate with family life...). For this reason, the present section will focus on the comparative ranking of preferences (rather than on the amount each quality is rated with).

In addition, in the 2008 wave, the value of responses of the qualities were different (1 meant mentioned, and 0 meant not mentioned). In order to facilitate comparability between the two editions, the variables from the 2008 edition have been recoded into new variables, which adopt the counting of the last wave.

After the brief methodological notes, the selection of the question regarding job qualities, is connected with an underlying trend that people are increasingly valuing “free” time more over traditionally predominant qualities such as salary (Lozano, 2020; Reinicke, 2022). This involves the phenomenon of valuing leisure time more, along with a wider concern with family life conciliation. Some studies even point out that valuing a healthy work life balance predicts higher happiness and wellbeing (Jachimowicz et al., 2019; Whillans et al., 2019). Along with the valuing of free time, an increasingly important trend is also the fact of giving importance to having a purposeful job among younger generations (Dain, 2023). The present analysis allows us to understand whether these trends have permeated sufficiently in the analysed territories.

In the Basque Country in 2008, the most relevant quality (of those analysed) was considered to be “good pay”, followed by “good hours” and at a great distance from the rest. The prioritisation of “good pay” is a recurring theme in all the territories under analysis, manifesting to varying degrees in each case, and on the opposite end, “generous holidays” are the least valued quality in all territories (except for Spain, where the least valued quality is “opportunity to use initiative”).

Chart 5.22 Importance of job qualities in Euskadi by time (%)



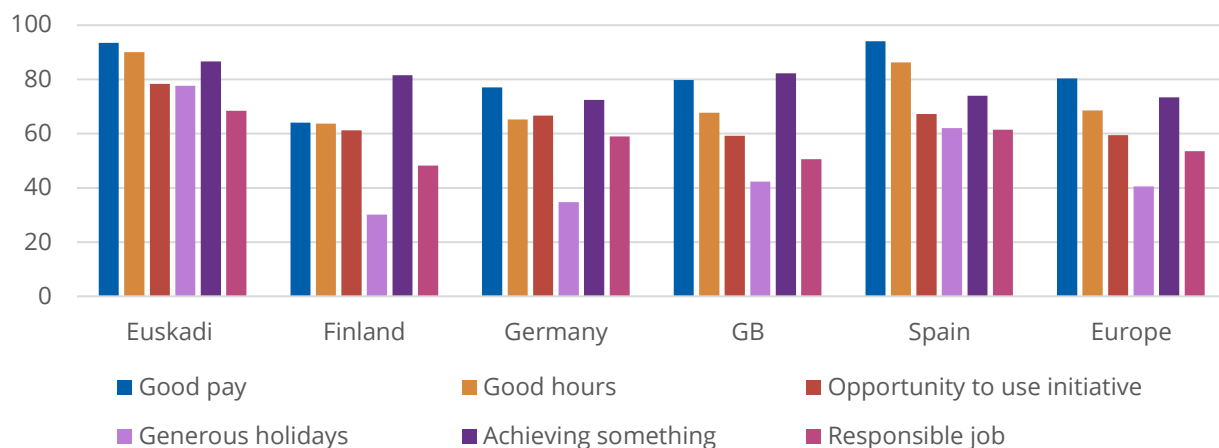
Notes: Percentage of mentions of the quality

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

A decade later, the order of prevalence of the qualities has remained the same in Euskadi, as follows (from highest to lowest): “Good pay”, “Good hours”, “Achieving something”, “Generous holidays” and “Opportunity to use initiative”, and least, “Responsible job”. We can observe that

income and the fact of “achieving something” are the two most predominant qualities. Notably, only in Finland, the latter is given greater weight than the former. The position about these two qualities is very homogeneous in the Basque Country, with a low dispersion (between 0.250 and 0.299) compared to other qualities (over 0.340). This is the most homogeneous view after the importance of a good salary in Spain.

Chart 5.23 Importance of job qualities by country (% , 2017-2019)

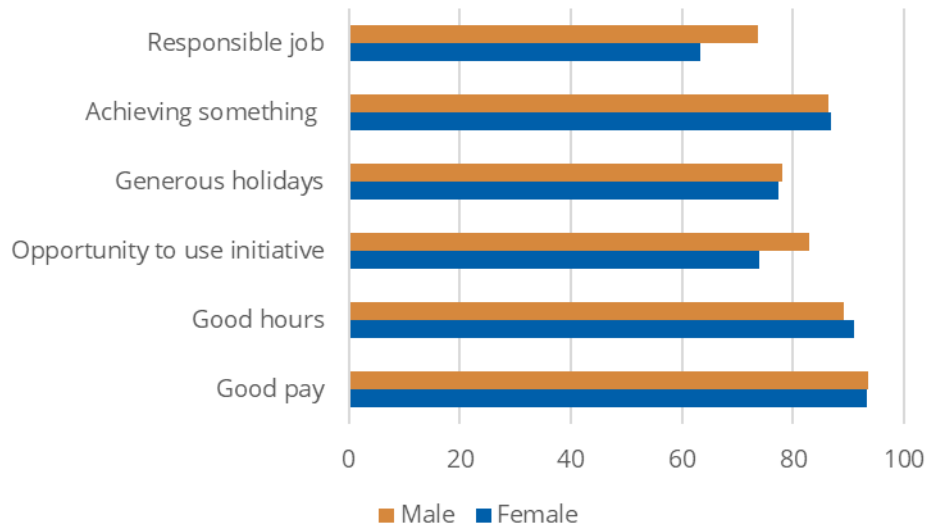


Notes: Percentage of mentions of the quality

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

From a gender perspective, the following [Chart 5.24](#) shows disparities within the Basque Country. In particular, the quality of "opportunity to use initiative" is perceived as less significant by female respondents in the region, even less so than holidays. In general, male respondents prioritise a responsible job more than female respondents and indicate that salary is of equal importance to them. With regard to working hours, female respondents indicate a greater priority than male respondents, which may suggest the necessity to reconcile work with other types of workloads, particularly those associated with care.

Chart 5.24 Importance of job qualities in Euskadi by gender (% , 2017-2019)

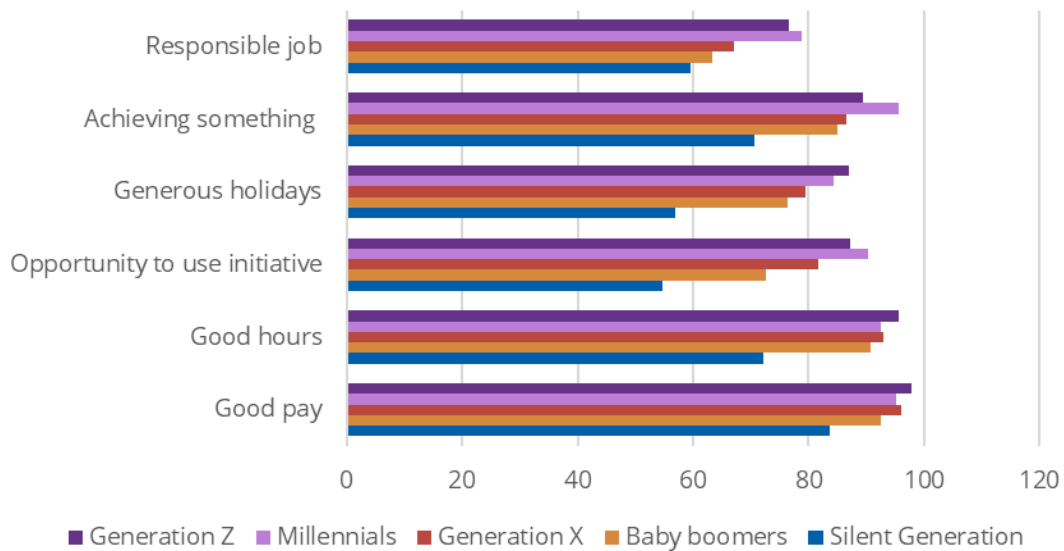


Notes: Percentage of mentions of the quality

Source: Own elaboration based on EVS 2017-2019, and EVS 2018 Basque Country

From a generational standpoint (see [Chart 5.25](#)), several noteworthy findings emerge with regard to the Basque Country. Silent generation (the oldest) tends to attach less significance to the majority of work-related qualities, a phenomenon that is likely associated with their advanced age and no longer being within the traditional working age range. The order of preference is quite consistent across all generations, with a slight variation. The Silent Generation places more importance on having a 'responsible job' than the ability to take initiative or holidays. For the rest of the generations, responsibility lags behind in last place. For Baby Boomers and Generation Z, initiative is less important than holidays. However, this is not the case for Millennials and Generation X, where initiative remains more important.

Chart 5.25 Importance of job qualities in Euskadi by generation (% , 2017-2019)



Notes: Percentage of mentions of the quality

Source: Own elaboration based on EVS 2017-2019, and EVS 2018 Basque Country

In general terms, there is a high degree of intergenerational coherence in the remaining comparable territories, where the older generation exhibits less divergence from the younger ones than is the case of Euskadi. It is notable that the importance of “achieving something” is emphasised by the youngest cohort (Generation Z) above all other aspects in Finland, Great Britain, Germany and the European average (all the territories apart from Euskadi and Spain). In Euskadi, it is Millennials who are mostly concerned about “achieving something” through their work.

Decrease importance of work

Box 12 EVS | Good/bad of decreasing work importance

Q37. Here is a list of some lifestyle changes that could take place in the near future. Please tell me, for each one of them, and assuming that they would take place, whether you think it would be a good thing, a bad thing, or you don't care: That the importance of work in our lives is decreased (v113)

(1) good – (2) bad – (3) don't care

Continuing with another value connected to work, the following analysis focuses on attitudes toward the potential decrease in the importance of work in people's lives, based on data

collected during the 2017-2019 wave of EVS, whether this evolution is a good or bad thing. Notably, this question was not included in the 2008 edition of the EVS, making longitudinal comparisons unavailable. Instead, the analysis focuses on gender and generational differences within the 2017-2019 dataset.

As the following table shows, the Basque Country is much more favourable to the decrease of importance of work in our lives than the comparable territories, and, in addition, this value is more homogenous within the region. Euskadi is followed by Germany and Spain (1,61 and 1,62 respectively); Finland (1,75), and particularly, Great Britain (1,95) show much more negative attitudes towards the decrease of importance of work, although in the latter the responses are far less homogenous.

Table 5.32 Good/bad decrease work importance descriptives by country and gender

Q37. v113	Mean			Std. Deviation
	General	Female	Male	
Euskadi	1.53	1.56	1.51	0.566
Finland	1.75	1.73	1.78	0.638
Germany	1.61	1.58	1.64	0.666
Great Britain	1.95	1.97	1.93	0.842
Spain	1.62	1.61	1.63	0.642
Europe	1.81	1.81	1.82	0.683

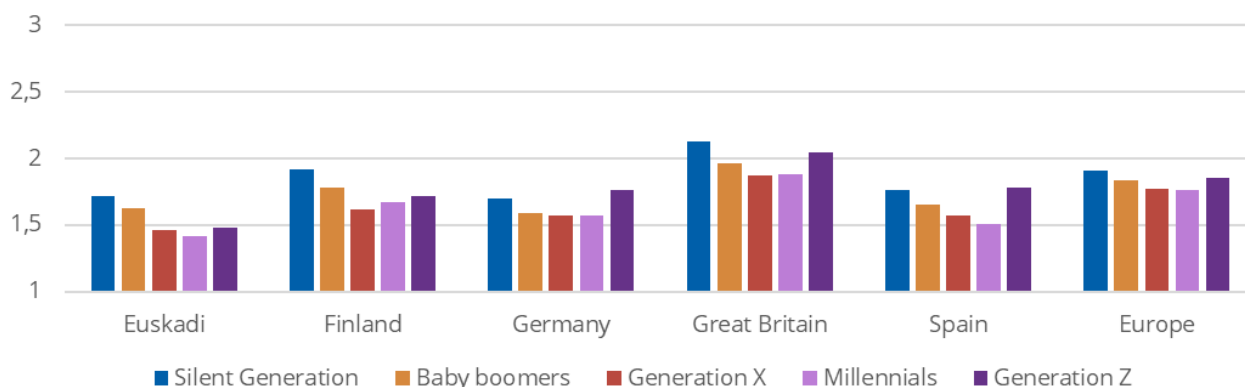
Notes: Decreasing the importance of work is (1) Good; (2) Bad (3) Don't care

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

From a gender perspective, in Euskadi, Spain and Great Britain female respondents have a higher preference towards a decrease in the importance of work, whereas in Finland and Germany it is the opposite. The biggest gender gap is found in Germany, and the lowest in Spain.

Having a look at generations at the following [Chart 5.26](#), a similar pattern in all territories can be observed, with a worse perception of work decreasing importance in older generations (Silent Generation and Baby boomers), the best perception of work decreasing importance is in middle generations (Generation X and Millennials), and lastly, a more intermediate position in the youngest generation (Generation Z). This might be due to the life stage in which each generation is, being the oldest in or closer to retirement, the middle ones embedded in their working life, with potential difficulties to balance work and personal life, and the youngest in an uncertainty arena for the beginning of the working life. However, this contradicts H2 of youngest generations being the most willing for work to decrease importance.

Chart 5.26 Good/bad decrease work importance descriptives (mean) by country and generation



Notes: Decreasing the importance of work is (1) Good; (2) Bad; (3) Don't care

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

Open and dynamic culture dilemma

The following section provides a more detailed examination of the values associated with the dilemma of an open and dynamic culture:

Immigrants (not) strain on welfare system

Box 13 EVS | Immigrants (not) strain on welfare system

Q52 Please look at the following statements and indicate where you would place your point of view on this scale:

Q52 C. Immigrants are a strain on a country's welfare system (1) - Immigrants are not a strain on a country's welfare system (10).

The first question refers to the social values regarding whether immigrants are or not considered a strain on the welfare system, on a scale of 1 (immigrants are a strain on a country's welfare system) to 10 (they are not a strain on a country's welfare system).

The Basque Country is the most supportive of the idea that immigrants are not a burden on a country's welfare system out of all the comparable territories. Euskadi, together with Spain already had higher scores in 2008, and it has increased further a decade after. Finland's stance remained relatively neutral, with only a slight increase in the perception that immigrants do not constitute a burden. Germany and Great Britain commenced the period under review with relatively low scores (approximately 3,4) in 2008, but subsequently exhibited notable increases, particularly in Great Britain. In the analysed territories a tendency towards more favourable positions is seen, however, the European average has remained very similar over time, with a

rather neutral position whether immigrant people constitute a burden or not in the welfare system.

In addition to the general attitude toward immigration, one variable that may be considered explanatory is the percentage of the immigrant population in relation to the total population or expenditure, together with the economic circumstances of the respondents and their level of dependency on state support. Also, the extent of coverage (and the items encompassed) within each welfare state can also be a significant factor in shaping the attitude towards a better or worse position.

Table 5.33 Immigrants (not) strain on welfare system descriptives by country and time

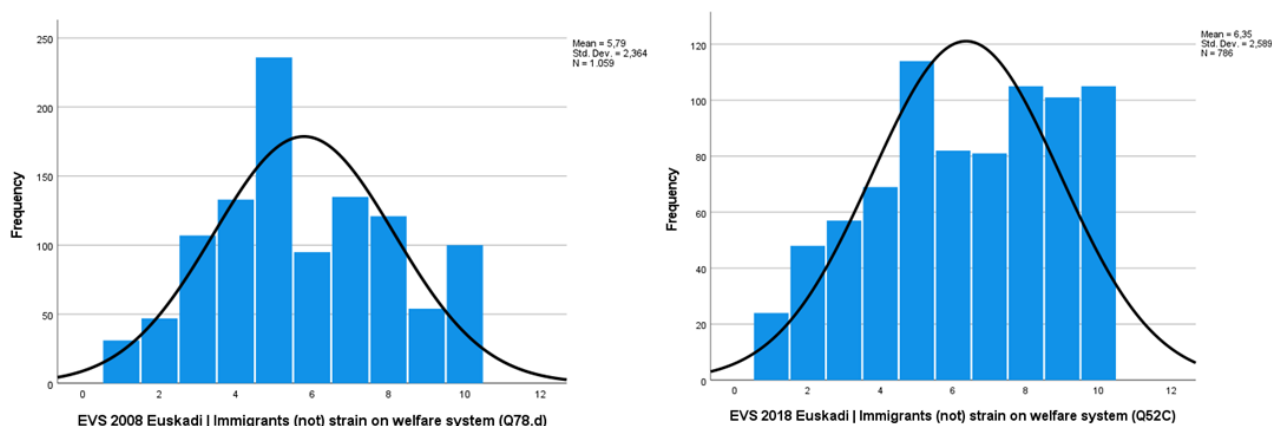
Q52C Immigrants strain on welfare system	Mean		Std. Deviation	
	2008	2017- 2019	2008	2017-2019
Euskadi	5.97	6.35	2.364	2.589
Finland	4.54	4.91	2.437	2.579
Germany	3.41	4.13	2.399	2.652
Great Britain	3.40	5.17	2.496	2.815
Spain	5.50	6.05	2.368	2.750
Europe	4.55	4.52	2.737	2.848

Notes: Scale 1-10. (1) Immigrants are a strain on a country's welfare system – (10) Immigrants are not a strain on a country's welfare system.

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

The standard deviation, despite it has increased since 2008, is the smallest in Euskadi out of all the comparable territories. However, all territories have considerable dispersion (between 2,589 and 2,815). An examination of [Chart 5.27](#) reveals that, whereas in 2008 many respondents exhibited a neutral stance, a significant proportion of the population now displays a more favourable disposition towards immigrants.

Chart 5.27 Evolution of distribution of immigrants (not) strain on welfare system



Notes: Scale 1-10. (1) Immigrants are a strain on a country's welfare system – (10) Immigrants are not a strain on a country's welfare system.

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

From a gender perspective (see Table 5.34), male respondents consider immigrants less of a strain for the welfare system than female respondents, and the gap has increased over time. Nevertheless, both women and men in the Basque Country continue to express the most positive attitudes towards immigration. In the rest of the territories, the results differ: female respondents are more favourable in Finland, Germany, Spain and the European average during the last wave of EVS, with a large gender gap particularly in Finland.

Table 5.34 Immigrants (not) strain on welfare system descriptives by country and gender

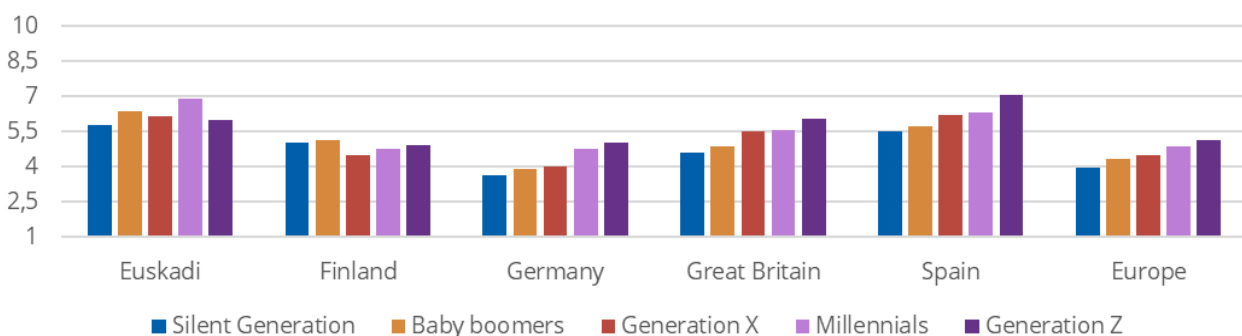
Q52C Immigrants strain on welfare system	Female (mean)		Male (mean)	
	2008	2017-2019	2008	2017-2019
Euskadi	5.72	6.16	5.85	6.56
Finland	4.70	5.15	4.38	4.66
Germany	3.42	4.26	3.39	4.00
Great Britain	3.39	5.15	3.42	5.20
Spain	5.47	6.08	5.54	6.01
Europe	4.56	4.57	4.54	4.46

Notes: Scale 1-10. (1) Immigrants are a strain on a country's welfare system – (10) Immigrants are not a strain on a country's welfare system.

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

A similar pattern emerges when disaggregating by generation across four territories in the latest available year. In Germany, Great Britain, Spain and the European average, younger people are less inclined to view immigrant population as a burden on the welfare system, whereas older age groups tend to perceive them as a greater burden. In Euskadi, the distribution is different, as millennials are the most supportive, followed by baby boomers, the Generation X, Generation Z and the least supportive are the oldest co-hort. Finland has also a more U-form distribution, with youngest and second-oldest generation being the most supportive of immigrant population.

Chart 5.28 Immigrants (not) strain on welfare system descriptives (mean) by country and gender



Notes: Scale 1-10. (1) Immigrants are a strain on a country's welfare system - (10) Immigrants are not a strain on a country's welfare system.

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

Immigrants (not) maintain own customs

Box 14 EVS Immigrants (not) maintain own customs

Q52 D. It is better if immigrants maintain their distinct customs and traditions (1) ----- It is better if immigrants do not maintain their distinct customs and traditions (10)

Another area of significant polarisation, particularly in the sessions with young people, was the tension between embracing new cultural influences and maintaining one's own cultural identity, particularly in terms of language. The Basque language was a tense point of contention in this regard. In order to gain further insight into these issues, the following two EVS questions are analysed: firstly, whether immigrants should maintain their own culture, or they should adapt to the local culture, and secondly, the importance of speaking the local language for nationality.

Most territories exhibit a relatively neutral stance, with a slight inclination towards the dissolution of the distinctive cultural and traditional practices of immigrants (see [Table 5.35](#)). In the Basque Country, there has been a slight increase in the proportion of the population that considers that they should not maintain their traditions. A similar tendency against maintaining distinctive customs has also been observed in Germany, Spain and the European average, while an opposing tendency has been noted in Germany and Finland. The level of dispersion is also considerably high in all territories, with the Basque Country in an intermediate position.

Table 5.35 Immigrants (not) maintain customs descriptives by country and time

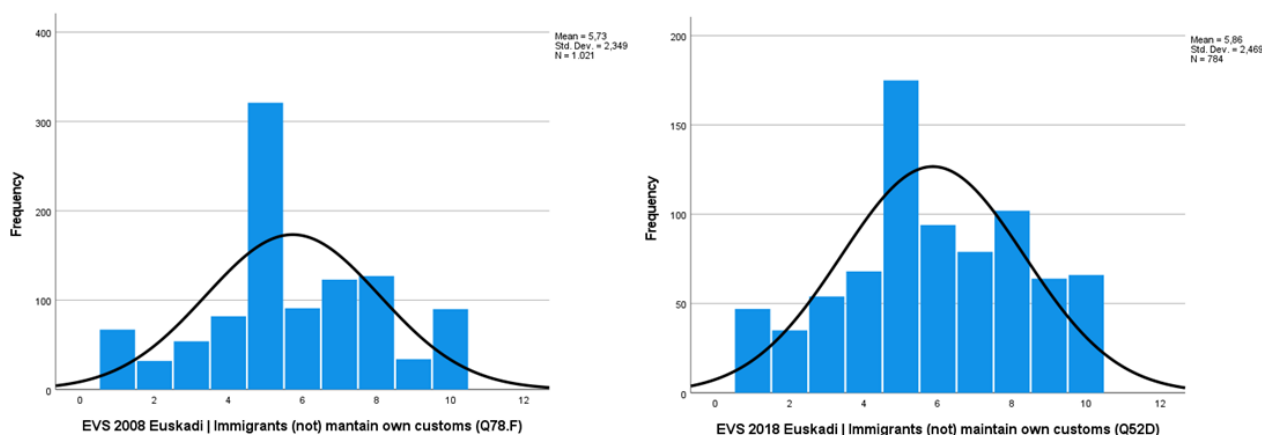
Q52D Immigrants maintain/not maintain own customs	Mean		Std. Deviation	
	2008	2017- 2019	2008	2017-2019
Euskadi	5.73	5.86	2.349	2.469
Finland	6.86	6.33	2.374	2.197
Germany	5.27	5.75	2.664	2.453
Great Britain	6.34	5.74	2.682	2.460
Spain	5.84	6.24	2.284	2.702
Europe	5.54	5.80	2.834	2.769

Notes: Scale 1-10. (1) It is better if immigrants maintain their distinct customs and traditions – (10) It is better if immigrants do not maintain their distinct customs and traditions

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

The results of the value distribution observation are noteworthy for their curious nature. In both 2008 and 2018, a significant proportion of respondents (between a 20 and 30 percent of the population) adopted a neutral position with regard to the maintenance of distinctive culture (5 out of a scale 1-10). This may be indicative of an effective intermediate position, or a reluctance to adopt a stance on the matter due to its sensitivity.

Chart 5.29 Evolution of distribution of immigrants (not) maintain customs



Notes: Scale 1-10. (1) It is better if immigrants maintain their distinct customs and traditions – (10) It is better if immigrants do not maintain their distinct customs and traditions

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

In the Basque Country, female respondents exhibit a greater degree of opposition to the maintenance of immigrant distinctive cultural and traditional practices, a shift from the 2008 survey results, as visible in [Table 5.36](#). A potential explanatory factor could be the origin of immigration and the role of women in their culture or traditions.

Table 5.36 Immigrants (not) maintain customs descriptives by country and gender

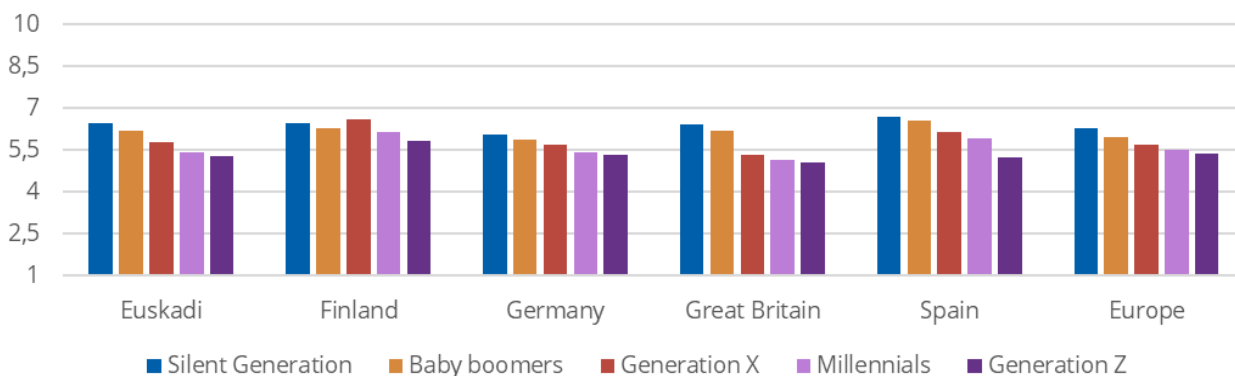
Q52D Immigrants maintain/not maintain own customs	Female (mean)		Male (mean)	
	2008	2017-2019	2008	2017-2019
Euskadi	5.67	5.90	5.80	5.82
Finland	6.52	6.18	7.20	6.49
Germany	5.31	5.63	5.22	5.86
Great Britain	6.33	5.66	6.36	5.84
Spain	5.85	6.24	5.82	6.24
Europe	5.49	5.69	5.61	5.92

Notes: Scale 1-10. (1) It is better if immigrants maintain their distinct customs and traditions – (10) It is better if immigrants do not maintain their distinct customs and traditions

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

From a generational perspective (see [Chart 5.30](#)), a clear linear downward pattern emerges (except for Generation X in Finland). Older age groups demonstrate a more conservative stance, advocating for immigrants to relinquish their traditional practices. In contrast, younger individuals tend to espouse a more favourable attitude towards maintaining their own traditions. The variation observed across age groups differs according to the geographical area under analysis.

Chart 5.30 Immigrants (not) maintain customs descriptives (mean) by country and generation



Notes: Scale 1-10. (1) It is better if immigrants maintain their distinct customs and traditions – (10) It is better if immigrants do not maintain their distinct customs and traditions

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

Importance of speaking the language

Box 15 Importance of speaking the language

53. Some people say that the following aspects are important to be truly (insert nationality: Basque, Spanish, ...). Others say they are not important. To what extent do you consider each of them important? To be able to speak (insert language: Basque, Spanish...) (1) Very important --- (4) Not at all important (v192)

In examining the significance of the local language, it is imperative to acknowledge that the Basque Country is a bilingual region, with two official languages: Basque and Spanish. This has resulted in the 2008 survey respondents are asked to answer for the importance of Spanish, while the 2018 survey asked for Basque. The latter has been identified as a source of contention in the context of the long-term vision process. Accordingly, an analysis of the 2008 scales for the territory of Euskadi will not be undertaken.

A review of the data reveals that in the Basque Country, the ability to speak Basque is not as crucial for immigrants as it is in other territories where the native language is of greater importance. The co-official status of Basque and the significant number of individuals at the local level who are not proficient in the language may also contribute to these findings. For a reference, according to Eustat, only the 62.4% of residents in the Basque Country had some knowledge of Basque in 2021. A greater degree of dispersion is evident in Euskadi in comparison to other regions on this matter (see [Table 5.37](#)).

Table 5.37 Importance of speaking the language descriptives by country and time

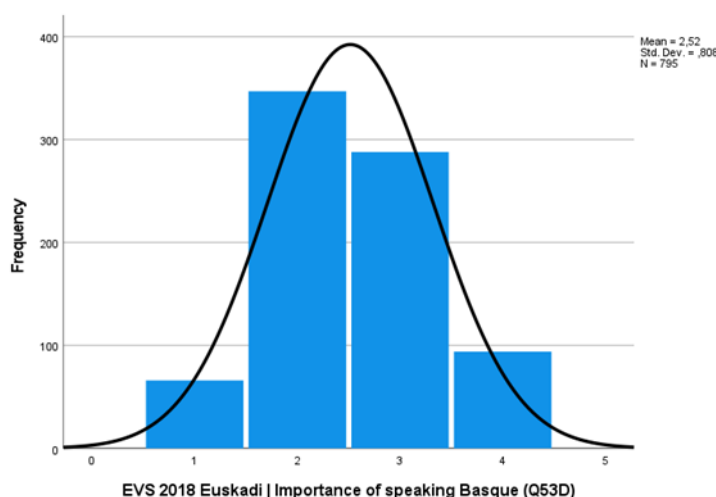
Q53 Speak the language	Mean		Std. Deviation	
	2008	2017- 2019	2008	2017-2019
Euskadi	-	2.52	-	0.808
Finland	1.62	1.73	0.721	0.701
Germany	1.30	1.31	0.521	0.501
Great Britain	1.34	1.40	0.550	0.591
Spain	1.58	1.50	0.702	0.692
Europe	1.53	1.45	0.723	0.628

Notes: Scale 1-4. (1) Very important – (2) Quite important – (3) Not very important – (4) Not at all important.

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

Notwithstanding the discussion held during the visioning process that reflected a certain level of polarisation of the population with respect to the use of the language in question, the quantitative data do not substantiate this hypothesis. Instead, the data indicate a normal distribution with the majority of responses falling within the middle values, which would appear to favour the emergence of a shared vision. Some of the polarisation can be explained by applying this value to a specific situation, as the major disputes revolved around whether or not it was important to require Basque in order to get a job, particularly in the public sector.

Chart 5.31 Evolution of distribution of importance of speaking the language



Notes: Scale 1-4. (1) Very important – (2) Quite important – (3) Not very important – (4) Not at all important.

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

From a gender perspective (see Table 5.38), it is also visible that speaking the local language remains crucial across most countries, with generally consistent gender perspectives and slight regional variations over time. In Euskadi, female respondents consider speaking the language

slightly less important than male respondents, similarly to Germany and Great Britain. However, differences are overall not very high.

Table 5.38 Importance of speaking the language descriptives by country and gender

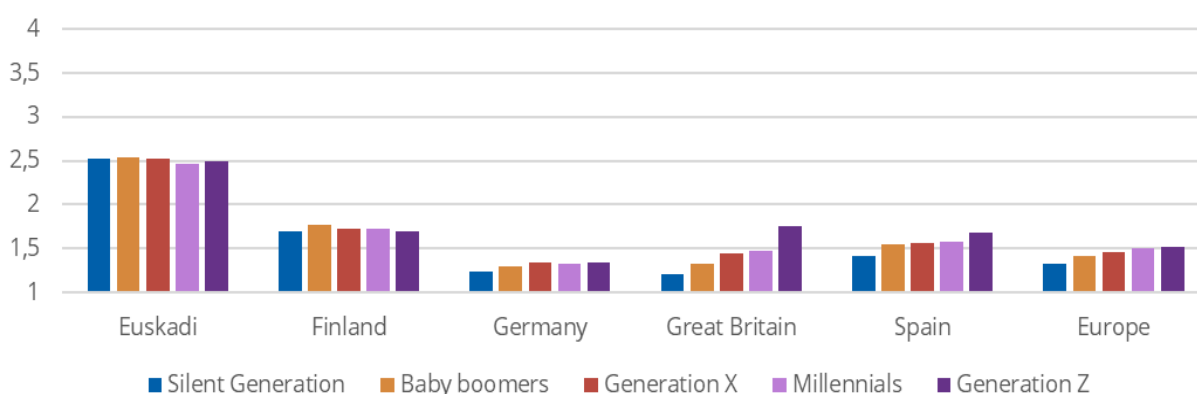
Q53 Speak the language	Female (mean)		Male (mean)	
	2008	2017-2019	2008	2017-2019
Euskadi	-	2.56	-	2.47
Finland	1.59	1.71	1.65	1.76
Germany	1.31	1.31	1.30	1.30
Great Britain	1.35	1.40	1.32	1.36
Spain	1.58	1.50	1.59	1.61
Europe	1.53	1.45	1.54	1.45

Notes: Scale 1-4. (1) Very important – (2) Quite important – (3) Not very important – (4) Not at all important.

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

When a generational optic is incorporated as in [Chart 5.32](#), we see two distinctive patterns. On the one hand, Euskadi and Finland show small variances on the importance of speaking the language across age groups. However, in Great Britain, Spain and the European average, older generations consider the own language more important; in Germany, a mix between both patterns can be seen, since the highest importance is given by the two oldest generations, and the three youngest ones give similar importance to speaking German.

Chart 5.32 Importance of speaking the language descriptives (mean) by country and gender



Notes: Scale 1-4. (1) Very important – (2) Quite important – (3) Not very important – (4) Not at all important.

Source: Own elaboration based on EVS 2008, 2017-2019, and EVS 2008, 2018 Basque Country

5.4.1.2. Territorial and leaders' values comparative

After having analysed the territorial vision-action values, the subsequent stage of the process is to undertake an analysis of the values of the individuals who were leading the initiative, to understand the impact of their values in the process. As for the territorial analysis, values associated with the three dilemmas (environmental, work-related and cultural) will be explored in that order.

Environmental dilemma

Table 5.39 shows data regarding personal and general sacrifice by leaders and the territorial mean. Regarding personal sacrifice, leaders are more willing to give part of their income to fight environmental pollution than the territorial mean. Moreover, this view is more homogeneous within the leadership group than it is in the territory. As for general sacrifice, i.e. should priority be given to environmental protection or economic growth and job creation, the leadership group gives more priority to economy over the environment, but the view is less homogenous within the leadership group.

Table 5.39 Territorial and leaders' environmental vision-action values

	Q56. C "Personal" sacrifice		Q57. General sacrifice	
	Mean	Std. Deviation	Mean	Std. Deviation
Territorial	2.75	1.311	1.30	0.460
Leadership	2.50	0.837	1.60	0.548

Notes: Q56. (1) Completely agree with giving part of the income for environmental protection ---- (5) Completely disagree

Q57. (1) Priority should be given to environmental protection. (2) Priority should be given to economic growth and job creation

Source: Own elaboration

It is evident that the leadership team has not yet established a clear hierarchy of priorities between the two key areas of economic development and environmental protection. They are in favour of economic growth and employment generation in general terms, along with more in favour of individual contributions to environmental protection, most likely because they consider both are compatible, as will be seen in the qualitative analysis section.

Work-life balance dilemma

Regarding the importance of life aspects, we can observe there are certain differences among the territorial values and the leadership group. The most important aspect for both groups is family, with a very small variation, in fact, it is homogeneously chosen as the most important within the leadership group. The next most valued aspect for leaders is "work", and "friends and acquaintances", whereas the order is the opposite at the territorial level (i.e. work is more important for leaders and friends are considerably more important for the territory). Similarly, leisure time is considerably less important for leaders, at the same level as politics. Finally, both groups consider religion the least important life aspect. As for the dispersion of values, leaders have a more homogenous perspective.

Table 5.40 Territorial and leaders' importance of life aspects values

Q1. Mean	Work	Family	Friends and acquaintances	Leisure time	Politics	Religion
Territorial	1.58	1.09	1.39	1.42	2.74	3.11
Leadership	1.33	1.00	2.00	2.17	2.17	3.17
Q1. Std. Deviation	Work	Family	Friends and acquaintances	Leisure time	Politics	Religion
Territorial	0.899	0.300	0.569	0.562	0.975	0.968
Leadership	0.516	0.000	0.000	0.408	0.408	0.408

Notes: Scale (1) Very important (2) Important (3) Not very important (4) Not at all important

Source: Own elaboration

As for the qualities that are more important in a job, the leadership group homogenously prioritise the opportunity to use initiative and achieving something through working. After those two qualities, leaders prioritise good pay and having a responsible job, good hours, and lastly, holidays. This goes in line with the responses of leaders in the previous question, where leisure time is not as important for leaders as it is for the territory. Thus, it stands in stark contrast to the order at the territorial level, wherein remuneration, work schedules, and the potential for gainful employment represent the most important aspects.

Table 5.41 Territorial and leaders' importance of job qualities

Q11 (Mean)	Good pay	Good hours	Opportunity to use initiative	Generous holidays	Achieving something	Responsible job
Territorial	1.07	1.10	1.22	1.22	1.13	1.32
Leadership	1.17	1.33	1.00	1.83	1.00	1.17
Q11 (Std. Dev)	Good pay	Good hours	Opportunity to use initiative	Generous holidays	Achieving something	Responsible job
Territorial	0.247	0.299	0.412	0.417	0.340	0.465
Leadership	0.408	0.516	0.000	0.408	0.000	0.408

Notes: (1) Mentioned as important (2) Not mentioned

Source: Own elaboration

Finally, with regard to the dilemma of personal and professional life, the leadership group is somewhat closer to considering the decrease of importance of work as a bad thing as shown in Table 5.42. This result is in line with the previous question, where the leadership group gives more importance to work than to other aspects of life. This view is not particularly homogenous among the leadership group. However, leaders' dispersion is somewhat lower than the territorial dispersion.

Table 5.42 Territorial and leader's good/bad work importance decrease

	Q37. Good/bad work importance decrease	
	Mean	Std. Deviation
Territorial	1.53	0.566
Leadership	1.67	0.516

Notes: Decreasing the importance of work is (1) Good; (2) Bad

Source: Own elaboration

It can therefore be observed that the leadership group displays a proclivity towards work, particularly in comparison to the territorial average. This is evidenced by a tendency to prioritise work over free time or leisure, and to engage in purposeful work, characterised by the achievement of something, proactive role prioritisation and taking initiative.

Open and dynamic culture dilemma

With regard to the cultural dilemma, the following [Table 5.43](#) presents a comparison between the territorial values and the values expressed by the leadership team. It is evident that there are considerably high divergences between the groups.

Table 5.43 Territorial and leaders' environmental vision-action values

	Q52C Immigrants strain on welfare system		Q52D Better if immigrants maintain/not maintain own customs		Q53 Speak the language	
	Mean	Std. Deviation	Mean	Std. Deviation	Mean	Std. Deviation
Territorial	6.35	2.589	5.86	2.469	2.52	0.808
Leadership	8.33	1.033	4.83	1.472	1.50	0.548

Notes:

(Q52C) Scale 1-10. (1) Immigrants are a strain on a country's welfare system – (10) Immigrants are not a strain on a country's welfare system. (Q52D) Scale 1-10. (1) It is better if immigrants maintain their distinct customs and traditions – (10) It is better if immigrants do not maintain their distinct customs and traditions.

(Q53) Scale 1-4. (1) Very important – (2) Quite important – (3) Not very important – (4) Not at all important.

Source: Own elaboration

The leadership team is significantly more in favour (8.33) that immigrant population are not a strain on the country's welfare system; moreover, this value is more homogeneous within the group (but it must be taken into account that the group is much smaller than the sample of the total territorial population).

With regard to the maintenance of the migrant population's own traditions, both the territorial value and the leadership group demonstrate intermediate positions. However, leaders are

slightly more inclined towards immigration preserving their traditions than the territorial average, that inclines towards the non-maintenance. As for the dispersion of the data, there is less consensus within the leadership team on this value than on whether they are a strain on the welfare state, while in the territory the dispersion is similar.

Speaking Basque is a feature considerably more important for the leadership team than it is for the majority of the territory; value more homogeneously dispersed among leaders. The perception of the leaders is more aligned with that of other comparable territories where there is only one official language. This may indicate that the leadership team perceives Basque as the primary language of the territory, or at the very least, on par with the co-official language, without any subordination in terms of importance. It is also notable that the vast majority of the leadership group speaks Basque fluently.

5.4.2. Qualitative perspective

The following section presents a qualitative analysis of the vision-action values as represented in the Euskadi 2040 process, on the three selected dilemmas. The subsequent [Table 5.44](#) illustrates the dimensions and sub-dimensions that will be subjected to analysis.

Table 5.44 Vision-action values qualitative analysis overview

Category	Dimension	Subdimension	Logic
Typology of values	Vision-action values	Environmental dilemma	Deductive
		Work-life balance dilemma	Deductive
		Open and dynamic culture dilemma	Deductive

Source: Own elaboration

As realised for visioning and vision values, the first step is a Co-Occurrence Analysis in order to understand the significance of the vision-action values throughout the process, as well as their distribution in accordance with the role (leaders or participants) of the individuals who express them. Territorial role is employed for the resulting shared vision.

Table 5.45 Vision-action values citation distribution by role in the process

	Environmental	Work-life balance	Open culture	Vision-action values
Leaders (total = 113) (100%)	5 (4.42%)	8 (7.08%)	7 (6.19%)	20 (17.7%)

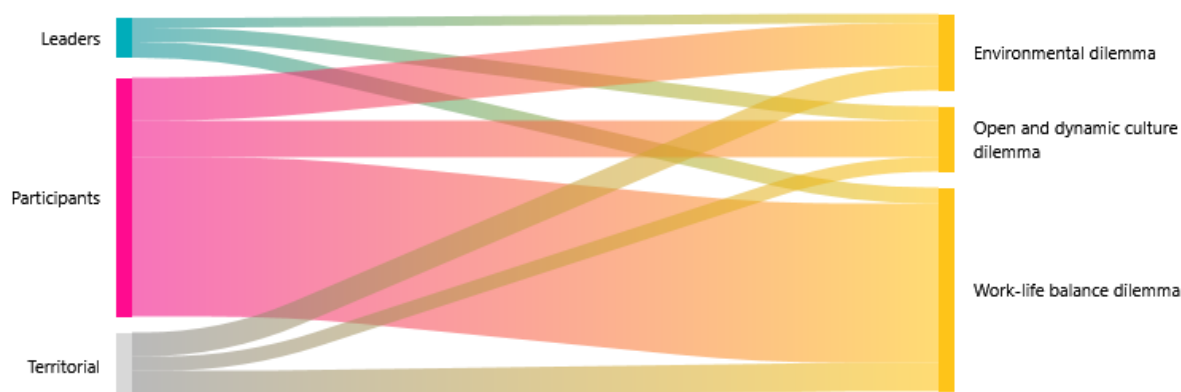
Participants (total = 362) (100%)	20 (5.5%)	78 (21.5%)	16 (4.4%)	114 (31.49%)
Territorial (total = 66) (100%)	12 (18.2%)	14 (21.2%)	7 (10.6%)	33 (50%)
Sum of citations	33 (21.6%)	91 (59.5%)	29 (18.9%)	153 (100%)

Note: Documents were obtained between September 2021 and November 2024

Source: Own elaboration via Atlas.ti

As seen both in the [Table 5.45](#) and [Figure 5.4](#) **participants give, both numerically and proportionally more importance to vision-action values than leaders**. Nevertheless, vision-action values are particularly present as territorial values in the resulting vision statement, being more than 70% of total references.

Figure 5.4 Vision-action values and process role Sankey diagram



Source: Own elaboration via Atlas.ti

Among the three dilemmas, the one on **work-life balance has been extensively tackled by participants**, whereas at the leadership level and territorial level, citations are more evenly distributed among the three action-point areas.

5.4.2.1. Leaders' values

Environmental dilemma

The stance of the leadership team regarding the relationship between the environment and economic development is that both are compatible, in line with approaches of "green growth".

Particularly, the potential of economic development and innovation for finding environmentally friendly solutions is highlighted, along with the fact that the transition can serve as a source of economic competitiveness by creating competitive advantage.

"If we start to innovate quickly, we will become green and generate new and innovative companies. Vehicle and aeronautical manufacturers are demanding green products (not gas/biogas). Our industry must adapt to the market." (Doc 51:11)

"This process should value environmental sustainability as a source of competitiveness for companies and for the territory as a whole, through innovation in products, services, value propositions and production processes and relations between companies and between companies and their customers." (Doc 61:3)

Concurrently, there is a certain degree of concern surrounding the global dimension of the climate crisis and the different stances adopted by the various territories on this matter. A sense of futility is perceived at the possibility that the regional efforts may ultimately prove ineffective if the impact continues as such in other part of the world.

"I am concerned about how the European Green Pact is developing, because we are being strict with ourselves, but the same standards are not being demanded for purchases from abroad. It is therefore a process of internationalisation of CO2." (Doc 32:1)

"It is true that Euskadi's year-round gas emissions are 18 hours from China." (Doc 51:10)

Work-life balance dilemma

The concept of work has been a pivotal topic of discussion for the leadership team as part of the vision-building process. They assert that they perceive a shift in the values associated with work among the younger generations. They recognise that a culture centred on the values of effort and entrepreneurship was historically prevalent in the Basque Country, as evidenced by the following intervention:

"The Basque Country has had a culture of business entrepreneurship. One of the strengths of the Basque Country is its entrepreneurial tradition, with serious and resilient entrepreneurs, with a culture of rootedness, effort and work. There has been a high sense of belonging and a high level of business, political and social commitment to the territory. Furthermore, Basque culture has also been associated with a high capacity for work, high identity solidarity, great value for effort and social recognition of cooperation." (Doc 60:1)

However, in several interventions, leaders perceive the shifting working culture among younger generations and perceive this shift as a competitiveness challenge for the desired future.

"One of the keys is that in terms of human resource management and attracting and retaining young talent we are facing a scenario of different priorities and values." (Doc 34:10)

"Nowadays it is very common to have young people involved in private companies that want to be involved in the public sector: more free time, more secure salary. There is a change in our values" (Doc 84:11)

In view of this situation, there is no unanimous and clear answer as to what exactly young people are looking for, there are differing opinions in the leadership team. Some interventions

indicate that young people place a high value on flexible working hours and free time. Nevertheless, this viewpoint is not held by the entire group, as evidenced by the opinion of another leader:

"Young people (...) have a different work ethos in other parts of the world. They go to the US and there they work twice as much" (Doc 34:11).

Other leaders point out at more holistic perspective:

"Young people are increasingly interested in more than just the career opportunities available to them; they also value the context, the territory and the wider opportunities that it offers" (Doc 47:35).

Accordingly, there is a perception that the value of work, which is an essential value for the territory according to the leadership team, is undergoing a transformation. There is no consensus as to which aspects are to be prioritised. However, there is concern about understanding the direction and reasoning behind these changes and the necessity for the territory to adapt to this new culture.

Open and dynamic culture dilemma

From the outset, the inclusion and cohesion of the immigrant population was identified as one of the key challenges for future competitiveness. In the discourse of the leadership group, this challenge is linked to two further issues: the demographic challenge and the sustainability of the welfare system.

"In order to guarantee the inclusion and cohesion of all people living in the Basque Country, it is necessary to implement strategies and policies that will ensure the advantages of an inclusive development model can be realised. These advantages can be seen from two perspectives: that of ethics and that of efficiency". (Doc 61:4)

On the other hand, the maintenance of local culture was also identified as a challenge for competitiveness or for a preferable vision of the future, formulated as follows:

"The promotion of their own distinctiveness, cultural heritage and value systems" (Doc 90:2).

In fact, initially, prior to the initiation of the multilevel and multi-actor process, the dimension "rooted and engaged" (subsequently renamed "committed"), was formulated as follows:

"That it maintains its differential element and its own identity and has a high level of social, political and business commitment to the territory, addressing future challenges, from its uniqueness, with a proactive and co-responsible attitude through new models of collaborative governance.". (Doc 90:1)

If we have a look at the description, there is no explicit reference to a dilemma in cultural terms in the formulation of the leadership group, it limits the description to the maintenance of the local culture (without referencing how much migrant population should or should not adapt).

5.4.2.2. Participants vision-action values

Environmental dilemma

Regarding environmental dilemma the view from participants raises certain issues in addition to the compatibility of economic development with the environment: the implications of environmental transition on vulnerable groups, the question on responsibility of the implementation of the sustainability transition, or the depth required in the transition.

Firstly, a significant proportion of participants, particularly those from multilevel institutions (city and provincial councils), espouse a similar majoritarian perspective to that of the leadership team, namely that economic development and environmental protection are compatible, as long as the transition is done in an orderly manner. Certain statements, however, denote certain preference for economic factor above the environment, for instance *"No loss of industrial fabric through environmental transformation"* (Doc 54:5). However, most institutional references reaffirm complementarity and adopt a 'green growth' approach:

"Paradigm shift in environmental and economic policies. From opposition to direct relationship. Today, 'green is competitive'." (Doc 38:2)

"The importance of raising awareness of the ecological transition as an investment in improving the quality of life: education, health (including the psychological factor of the satisfaction of achieving goals), environment, etc." (Doc 86:2)

Nevertheless, the first inter-institutional session was the setting for a particularly heated debate on the environmental dilemma. One of the participants proposed the question of the effectiveness of the Basque Country's vision for climate neutrality by 2040 in the event that other territories do not adopt a similar perspective.

"I would like to put a provocation on the table about moving forward the environmental transformation date 10 years, to 2040. Sustainability is a global challenge, our contribution is important, but we are very small. If other countries keep the target in 2050, will we have more negative impacts in other dimensions, while keeping the same result globally?" (Doc 51:2)

"An Amazonian tale featuring a hummingbird flower. In the face of a fire, the hummingbird proceeds to the river, collects water, and throws it to the river. The hummingbird is asked: What do you do if you cannot extinguish the fire with so little? I do what I can do. This response is analogous to the position of Euskadi in the context of the environmental challenge." (Doc 51:13)

As observed in the leaders' perspective paragraph (see page 210), they also acknowledge this problematic nature, but from the standpoint of maintaining the contribution to decreasing the impact, even if seen from a global perspective, the impact is low. Along with this, the question of responsibility is also raised by other participants, such as trade unions and business company associations, that demand a certain level of direction from institutions in view of the high level of uncertainty that the environmental transition is bringing. This also shows indirectly a certain level of uncertainty avoidance (Hofstede's cultural dimension) of the Basque population.

"In mature sectors, it is not clear what the direction is. Example: what car should I switch to?"
(Doc 56:8)

"The Green Deal is an economic pact. An orderly transition is very difficult, decisions will have to be made." (Doc 74:1)

"The need for informed and sustained government decisions over time to see what kind of energy is prioritised." (Doc 86:2)

"Agree that there is an individual responsibility in relation to the green transition, but the main responsibility lies in the institutions". (Doc 49:6)

"If we want to make the energy transition, we must see why we are in the situation we are in, and how to deal with it. But it can't be... this can't be fixed with a coat of green paint. Deep changes are needed, in our way of life and in the way we exploit and use our energy and our resources, as well as in the business system created around it, in the oligopoly and so on. That is, if I say that we are moving towards an ecological failure, well, we will have to analyse why, who are responsible and how we should solve it. And make decisions and implement changes. Otherwise, we would be faced with an exercise in hypocrisy." (Doc 47:10)

From another group of participants, in addition to the connection of environment and economy, another layer is added with the impact of economic transition with the social aspects. This connection was expressed from two optics: on the one hand, a potential complementarity between environmental transition and social inclusion, for example, *"the green part can be a driver for other things (inclusion, poverty, migration...). Example: cleaning up riverbanks"* (Doc 59:5). On the other hand, a large part of interventions highlighted the potential negative impact of "harder" environmental policies on vulnerable groups:

"The green transition has a greater impact on vulnerable groups in society, and this must be considered when making decisions, so as not to cause disruptions. For example, if limits are to be placed on mobility, by penalising vehicles with higher consumption, we are indirectly penalising those with less ability to change cars (lower income families). Another example: the phenomenon of the yellow vests. If it's not done right, it will create very strong reactions." (Doc 37:2)

"There are areas that will be particularly affected by decarbonisation, due to their majoritarian sectors. For example, Goierri, Durangoaldea, Ayala Valley, etc." (Doc 50:1)

"It is essential to align the pace of decarbonisation with the capacity to absorb the potential negative employment impact it may generate." (Doc 40:2)

Lastly, a few statements reflect about the reality of the business sectors' views and action regarding the actual implementation of the decarbonisation:

"Many companies see decarbonisation as an unaffordable expense." (Doc 50:1)

"The majoritarian position is that the "green" is incorporated when there is no other option, when taxes make the product more expensive, and because of value chain requirements."
(Doc 56:3)

"Circular economy is rather anecdotal." (Doc 56:9)

Work-life balance dilemma

The work-life balance dilemma has been undoubtedly one of the most addressed issues in the Euskadi 2040 visioning process. Participants' discourse tackles four core areas: the definition of the competitiveness challenge regarding talent and skills, the strategies that should be followed in order to address it, what do young people want when they search for a job position, and the value of effort. The statements regarding the four areas will be explained following.

Regarding the definition of the talent challenge, there is a high sense of urgency and vast magnitude, as proved by the following statements: *"The demographic challenge we face is of great calibre"* (Doc 34:15) or *"It is a challenge that needs to be addressed urgently, otherwise we risk 'simmering the frog'"* (Doc 35:2). In addition to the demographic challenge of increasingly aging population, several participants identify a gap in skills between demand and supply side:

"When I think about our fabric, I see that we need mechanical engineers, design engineers, etc. not just management positions." (Doc 33:2)

"We have a tendency to hire engineers to do secretarial work, and it doesn't motivate them. We have cheap, well-trained talent." (Doc 33:4)

"Skills need to be better matched, there is both under-qualification and over-qualification" (Doc 39:2).

Employer branding is one of the tools that certain companies are making use of in order to attract talent *"we manage to attract people because we have a very good brand image."* (Doc 33:1). Young people point out that *"There is a cultural penalty for failure. We have to be entrepreneurial and take risks"* (Doc 54:2). In this sense, in order to *"foster entrepreneurial spirit"* (Doc 34:16), the suggestion of *"there is a need to make industrial leaders more visible"* (Doc 33:10).

As was previously highlighted by the narrative of leaders, large part of the discussion centred on the aspirations of the younger generation in the contemporary era. Some of the aspects considered to be important for young people include:

- Stability: *"am very concerned about job stability, being able to offer a stable life project (professional project and housing) to young Basques"* (Doc 51:3). *"Most young people want to be civil servants"* (Doc 34:4), although the private sector argues that *"The norm is that, if you have attitude, you stay in the company too"* (Doc 34:7).
- Good income: there are conflicting views among participants as to whether young people are being paid enough or not. *"We are going to have to raise wages for those we are saying are in short supply, because we are competing globally"* (Doc 33:9). Companies argue that *"we all pay well if they come to work"* (Doc 34:18) or *"I have the feeling that in the industrial sector it pays well, wage levels are high"* (Doc 34:19). However, the unions point out that *"You have to take into account how much you get paid (they are Madrid and they get paid like Elche)"* (Doc 48:2).
- Quality job: *"Different understandings of quality employment between trade unions and employers"* (Doc 50:3)

- Training and career development: *"Young people are looking for an attractive project and continuous training/learning in what they are specialised in" (Doc 33:5). "They care about what technology they are going to use. As they feel they have more training, they switch off immediately." (Doc 33:8)*
- Flexible hours and more free time: one participant stated *"They (young people) no longer live to work but work to live" (Doc 50:5).*
- Recognition and relational aspects: *"Proximity and support are very important for them" (Doc 33:11).*

In contrast sessions conducted with young people, the dynamics of this dilemma were emphasised due to the divergence of views held by both participants and the leadership team regarding the desired outcomes and priorities of young people. The participants did indeed indicate some of the points previously identified, but also provided the following additional considerations about the order of preference of their job qualities:

"Stability, salary (not precarious) and working hours (good, flexible, allow for time off), and additionally, non-sedentary work, respect between colleagues, treat the employee as a person and not a machine. Work that is fulfilling, that is vocational. Compliance with labour laws and regulations" (Doc 53:2).

"The existence of a job contract, decent salary and additionally stable position, good working hours (for example, 4 days working week) that allow room for family conciliation, good sanitary conditions" (Doc 53:1)

Many statements were posed regarding the value of effort, from the point of view it is changing in younger generations:

"The reason there are no engineers is because it costs more, a question of effort" (Doc 34:17).

"We Basques were enterprising, brave, the first to go around the world, the first in the state to implement banking. There is a feeling that this is being lost" (Doc 38:5).

"Need for pedagogy with society to promote a culture of effort also in young people, and the taking of responsibility for one's own and other people's problems" (Doc 57:6).

"Not all people start from the same point when we talk about the value of work and effort" (Doc 59:6).

"Encourage non-conformism and openness to improvement of the new generations, to maintain and prosper in well-being" (Doc 86:1).

Some participants had a more positive point of view of younger generations, stating that:

"Nowadays, commitment is measured in a different way (not measured by time spent at work exclusively), for example, when they make proposals for improvement" (Doc 33:7).

Open and dynamic culture dilemma

With regard to the open and dynamic culture dilemma, immigration is seen as a necessary and somewhat inevitable phenomenon, linked to the demographic challenge in order to maintain

the developed welfare state (and particularly pensions), by both institutions and business agents, and also by young people involved in the process of constructing the vision.

"The relay will come from migration, opening the door to the challenges of inclusion and identity as a country". (Doc 52:10)

In light of this situation, which no participant qualifies explicitly as good or bad in itself, there are interventions that address the potential challenges that an increased migrant population may bring to the territory in the future. This challenges *"go beyond seeking employment opportunities for them (migrant population)"* (Doc 52:8), including the *"risk of ghettoisation"* (Doc 37: 3), the integration of *"second and third generations of immigrants"* (Doc 38:3), or *"the importance of the commitment of all, including locals and immigrants"* (Doc 56:5); from these interventions of participants a more negative perspective regarding the *"threats and problems"* that may arise (Doc 52:8) when facing increasing migrant population can be inducted.

Other participants posit that the immigrant population offers certain advantages and that a welcoming attitude on the part of the local population is necessary. The content of these interventions is closely related to "inclusive" dimension:

"Be careful with the term 'rooted' as an excessive focus on identity can exclude certain groups (e.g. migrants). Rooted, but embracing diversity". (Doc 39:4)

(It is necessary that we put effort into) *"Welcome foreign people and include them in our society"* (Doc 55:2).

"That society values diversity, with the participation of all, and with the contributions of all. Shifting from governance to include, to include in order to govern" (Doc 56:5).

Concurrently, several participants (along with the leadership team) attach considerable importance to the Basque Country's distinct identity and culture. The necessity to preserve these distinctive attributes is also reflected in the vision they project as desirable for the future, both at the institutional level and among the group of young people.

"It is necessary to highlight the differential and own cultural features (Basque, Basque culture, self-government) in the future" (Doc 70:2).

"The own essence and singularity of the Basque culture (language, history, ways of doing...) is not sufficiently highlighted (in the vision- statement)" (Doc 68:1)

"Maintenance of local customs (Euskera), without being a limit to inclusion". (Doc 54:7)

It is precisely this limit, as referenced in the previous intervention, that has generated and continues to generate friction in the process of constructing the vision, specifically in the translation of this vision of an 'open and dynamic culture' into reality. This is particularly evident in the contrasts with the youth groups when defining specific challenges, and especially when referring to the local language, where opposing positions are identified.

On the one hand, part of the youth advocate for *"fostering learning of Basque language in companies and enterprises"* (Doc 53:7), or that see as part of their responsibility towards the implementation of the vision to *"speak Basque and facilitate learning of foreign people"* (Doc 54:2). On the other hand, another part of youth participants claims the need to *"increase the*

educational offer that is not in Basque (in vocational training)" (Doc 53:8), and that "less importance is given to Basque language when accessing public employment" (Doc 53:6).

The aforementioned divergent perspectives held by young people serve to underscore the significance of an intersectional perspective, for it is an irrefutable fact that values can vary considerably even within a certain collective, such as that of young people.

5.4.2.3. Resulting vision-action values

The following section presents an analysis of the extent to which the views of the leaders and participants in the process, and their associated values, have been incorporated into the resulting vision in the three identified areas of action.

Environmental dilemma

Regarding the environmental dilemma, the resulting vision projects a 'green' Euskadi dimension. Although there is a more extensive list of indicators for the dimension, the main goal within the 'green' Euskadi is its carbon neutrality by 2040 (Doc 89:15).

The sense of the dimension makes explicit that the transition towards a more environmentally sustainable economic model is based on the existing obligation at international and European level (carbon neutrality by 2050), i.e. it is not based solely on the will of the territory, but on a global imperative. However, the long-term strategy and vision set out in the vision is to bring forward that date for the transformation, but in an *'economical and orderly manner, without damaging the bases of competitiveness of the economy'* (Doc 89:17). The narrative for the future of the dimension, also highlights the compatibility of economic development and the environment:

"This process must place value on environmental sustainability as a source of competitiveness for companies and for the territory as a whole, through innovation in products, services, value proposals and production processes and relations between companies, and between companies and their client" (Doc 89:19).

Although in the competitiveness challenges identified, it is made explicit that there may be frictions or negative impacts of the transition on employment and particularly on vulnerable groups, for which it is necessary to *'Define compensation mechanisms to mitigate the impact of decarbonisation on the most affected economic sectors and the most vulnerable segments of the population'* (Doc 89:21).

In terms of responsibility, two lines of action or transformation for a 'green' Euskadi are made explicit: supply-side (with challenges relating to the companies themselves, but also to public institutions) and demand-side (with special emphasis on users). Among the challenges, a reference has also been added to the need to *"Continue developing strategies that generate greater certainty in the purchasing decisions of users"* (Doc 89:22), demanded by the participants during the process.

In general terms, the shared understanding of the dimension's meaning aligns closely with the perspectives articulated by the leaders throughout the process. Furthermore, the vision reflects the perspectives of the participants, particularly in regard to the formulation of competitiveness challenges, as opposed to the wording of the meaning of the 'green' dimension.

Work-life balance dilemma

Regarding the work-life balance dilemma, the resulting vision projects a “prosperous” Euskadi dimension to 2040. The sense of the dimension makes explicit that *“talent (...) is a key differentiating factor for the competitiveness of the territory”* (Doc 89:23).

In terms of the identified competitiveness challenges, two stand out as particularly pertinent. These are formulated as follows: on the one hand, quality employment, which is projected as *“stable, adequately remunerated and with opportunities for learning and professional development”* (Doc 89:24). On the other hand, the attraction and retention of talent, with a plethora of sub-challenges:

“In view of the declining demographic and working age population, encourage the attraction of talent and skills and the continuous learning of people.:

- *To manage generational change and the transfer of knowledge, both in companies and in the public administration.*
- *Developing, attracting and valuing talent (understood in the broadest sense), by offering opportunities that allow for competitive working conditions and professional development. To this end, it will be important to have a Basque pact for talent.*
- *To continue to promote strategic collaboration between the educational world and the world of work for mutual learning and transformation.*
- *To develop training programmes (both at university, vocational training centres and in training for employment) in collaboration with social and business agents to guarantee a match with the professional profiles needed in the market (dual programmes, etc.).*
- *Promote ‘ad-hoc’ apprenticeship systems (similar to Denmark, Finland, Austria, and even Germany), which make it possible to spend as little time as possible in unemployment and to enter a new job, both for the long-term unemployed and for those affected by phenomena such as automation, robotisation and digitalisation.*
- *Adapt people's (and companies') skills to the needs arising from major transitions.*
- *Adapt labour supply to facilitate the use of the full potential of people's skills.”* (Doc 89:25)

In addition to the dimension of prosperity, the dimension of “inclusive” Euskadi also encompasses aspects pertaining to the work-life balance, particularly with regard to family-life and work reconciliation, stating the following as a competitiveness challenge:

“Promote reconciliation measures that allow people to develop their personal, family and working lives, and families who choose to do so, to play a role in caregiving” (Doc 89:26)

Ultimately, the value of effort and the reinforcement of the entrepreneurial spirit are incorporated into the dimension of a “committed” Euskadi, where the following has been identified as a competitiveness challenge for the desired territory in the future:

"Promote social values to strengthen the competitiveness model at the service of inclusive and sustainable wellbeing:

- *Encouraging proactivity and individual and collective commitment of the new generations, to maintain and prosper in well-being, also working on the enhancement of these values in the media and promoting them in families and in the education system.*
- *Valuing work and effort as the basis for individual wellbeing and commitment to collective wellbeing.*
- *Reinforce the recognition of entrepreneurship, entrepreneurial vocation, ambition for growth and a critical, open and creative mentality"* (Doc 89:27).

Open and Dynamic culture dilemma

Regarding the open and dynamic culture dilemma, the resulting vision projects a "committed" Euskadi, under which this dilemma resulting standpoint can be found. In the narrative of the sense of the dimension a novel construct is proposed: "singular dynamic culture", as desirable for the territory. This construct is defined as follows:

"A rooted Euskadi, which means the generation of a community, in a country, with its own identity and language and differential values, (...) and open to the world; welcoming other cultures and visions. A country with the challenge of advancing in a permanent process of 'dynamic community building'. A country with roots, building on its past, involved in the present and committed to its future." (Doc 89:4)

The resulting vision statement does not position itself completely on one side of the dilemma, but rather attempts to reconcile the two positions. However, the challenges are more closely aligned with the preservation of one's own cultural identity than with the ways in which openness to cultures of foreign origin is to be guaranteed. This is evident from the formulation of the challenge itself:

"Maintain and promote a singular and dynamic identity of Euskadi that generates a sense of community, that contemplates its own social values and culture, and that is open to an increasingly interconnected and globalised world.

- *To continue to promote the learning and use of the Basque language.*
- *Safeguarding Basque cultural heritage and guaranteeing its access and enjoyment by society."* (Doc 89:5)

Indirect reference is also made to this dilemma in the dimension of an inclusive Euskadi, where the challenges of welcoming various groups are mentioned: *"to holistically address the inclusion and reception needs (educational, health, social, etc.) of immigrant groups (including 2nd and 3rd generations), which will be key to achieving a competitive and socially balanced model in response to the demographic transition"* (Doc 89:3).

5.4.3. Vision-action values conclusions

From the analysis of the vision-action values of the territory the following evidence has been identified, regarding the three dilemmas:

As for the **environmental dilemma**, Basque respondents are more favourable to giving part of their income for environmental production than in other comparable countries. However, the considerable divergence of opinion makes it extremely difficult to establish a shared vision on this matter. Younger generations are more favourable towards environmental protection, but the economic status is also a factor that needs to be considered when measuring the support towards environmental transition.

An analysis of the values espoused by the leadership team reveals a divergence in preferences between the two posed questions. This is because they assume and position economic growth and environmental protection as compatible.

The **work-life balance dilemma** has been the most addressed dilemma as part of the visioning process, particularly by participants, probably due to its high linkage with the competitiveness for wellbeing topic and the nature of many participants (such as companies, trade unions, business associations or third sector). Both leaders and participants have identified a shift in the prevailing work culture in the region. Indeed, the quantitative results demonstrate a decline in the perceived importance of work, although it is notable that this perception was initially more pronounced than in other comparable territories.

The issue is perceived as more urgent due to the fact that a significant number of participants involved in the process (and also part of the leadership group), consider the values of hard work and effort as integral components of the historical cultural identity of the territory, and the key to achieving the wellbeing status of today, and have an evolutionary perspective of their desirable future. Nevertheless, those most favourable to the decrease of the importance of work are not youngest generations, as many participants assume, but intermediate cohorts, according to EVS data.

Regarding the most valued qualities of a job, good salary and good hours are the top priorities in the Basque Country, followed by a job to achieve something. A quality job is defined in the resulting vision as one that provides stability, fair remuneration and opportunities for learning and professional development. The notion of a purposeful job could also be incorporated according to EVS data, and additionally, from what has been extracted in the process "stability" should also be incorporated as a in important quality to be measured in the next EVS wave, to better understand its level of preponderance.

As for **the open and dynamic culture dilemma**, migrant population is perceived in the Basque Country as a less significant burden on the welfare system than in other regions, with a relatively low level of dispersion compared to other territories, although it still remains high, most likely linked with the low level of immigration present historically in the region. For leaders, not only they are not considered a burden on the welfare system, but they are considered important and necessary for the sustainability of the welfare system, in view of the demographic situation of the country.

Regarding the maintenance or not of their culture, it is curious to see that many people remain in an intermediate position, maybe not wanting to position themselves on the topic. The need to speak or not the language was one of the most polarised topics emerging from the sessions, particularly with youth. Quantitative results show that Basque is much less important than their national language in other territories, however, the dispersion is much higher in the Basque Country, confirming the wide array of opinions. For part of the leadership team, and also many institutional participants, the maintenance of the local culture remains a deeply relevant challenge towards the future.

5.5. Contrast of the conceptual-analytical framework

The analysis section will be concluded with a discussion of the conceptual-analytical framework developed in the previous chapter. Particular emphasis will be placed on refining the framework in order to render it as actionable as possible for future use.

The initial focus will be on the definition, role and level of the values on the three stages at which social values influence shared vision. Subsequent commentary will address more general issues that pertain to the three categories simultaneously.

Visioning values

To the already identified areas that encompass visioning values (method and participation), a new category needs to be added as emerged from the analysis: **context**. Our analysis has shown that perceptions regarding the state of the world are highly relevant when it comes to prioritising the generation of visions and determining whether or not to do so in a participatory manner. For instance, the sense of uncertainty—and how that uncertainty is managed—emerges as a critical factor to consider as a visioning value. This insight highlights that the broader context, including societal, economic, and environmental uncertainties, significantly shapes how visioning processes are approached and valued.

It is confirmed that **leaders give proportionally higher relevance to visioning values than participants**, but participants also give importance to visioning values. It is evident that the values espoused by the leaders and participants have been most reflected in the resulting vision, with a greater degree of impact by those of leadership, who played a dominant role regarding decision-making of the visioning process.

Vision values

Vision values are defined as the social values associated with the content of the vision, i.e. what constitutes preferable values for the future and what the specific content of those values is. Via the analysis, another category has emerged inductively that is part of vision values: **what a vision should be and the characteristics it ought to have**. Despite it has connection with the method part of visioning values, a decision was made to include it as a vision value since it

directly impacts the outcome of the vision. In the case of Euskadi 2040, diverse adjectives are attached to what is projected as a vision (e.g., ambitious, inspiring, consensual, unique, realistic, etc.). Furthermore, the varied meanings that each of these adjectives holds for different individuals must also be considered. This diversity underscores the complexity of defining a shared vision in a way that aligns with collective aspirations while respecting individual interpretations.

In addition, the **level of values is particularly important for vision values**. This entails that the representativity in the process of different societal groups and interests is essential for an ethical development of a shared vision. It depends on participant values but also on the commitment of leaders to reflect participants values on the outcome, following principles of transparency and ethics.

Moreover, interference from official visions, such as the climate neutrality goals by 2050, has been observed in the visioning process, particularly among leaders. Dominant narratives or discourses, such as green growth, have also influenced leaders and certain stakeholders. This underscores that legal and regulatory constraints shape the range of possible futures, and what is deemed desirable must align with these binding parameters.

Vision-action values

Similar to vision values, vision-action values are also dependent on the thematic focus. While it remains important to keep both types of uncertainties in mind, it was too broad for the analysis to use solely the categories of "applicability to specific situations" or "large part is the prioritisation among values". Instead, the approach has been to **analyse** these values **through specific situations and concrete dilemmas**. In an ex-post analysis, these dilemmas can emerge directly from the process itself, highlighting the issues that proved most problematic. Conversely, in an ex-ante analysis, other futures methods, such as trend analysis, could be employed to identify potential points of conflict.

By incorporating the abovementioned modifications, the **resulting framework** is the following (see [Table 5.46](#)):

Table 5.46 Contrasted conceptual-analytical framework

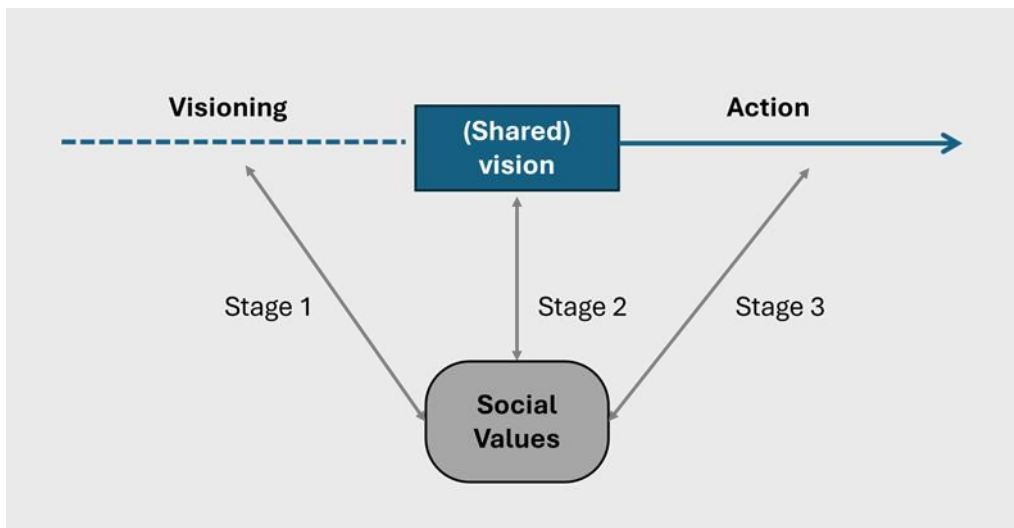
Categories	Definition	Level & role	Analysis factors
Stage 1: Visioning values	Normative foresight process related social values, regarding: - Context - Method - Participation	Predominantly marked by <u>leadership values</u> (both individual and organisational)	<i>Centre point</i> or positioning, in order to check where the shared vision could be positioned <i>Spread of values</i> or polarised positions for its connection with values as limits of preferable futures <i>Distribution of values</i> or level of homogeneity of interventions in order to see whether it is enabling or disabling shared vision <i>Level of representativity</i> of analysed values with respect to the territory to ensure quality
Stage 2: Vision values	Social values associated with the form and content of the vision. - Which social values are preferable towards the future - How are those preferable social values defined, which is their content - What characteristics should the resulting vision have	Predominantly marked by <u>participants' level of values</u> (both individual and organisational) Leadership values can also influence, when leaders' take part in the vision content-development, and via their commitment towards incorporating participants' values on the outcome	
Stage 3: Vision- action values	The social values that influence whether and how the vision is taken into action: - What specific values apply to a situation - Which value is preferable over another in a given situation For their analysis it is useful to identify specific situations or dilemmas.	Predominantly marked by <u>territorial values</u> , since a territorial vision does not only apply to the group (leaders and participants) that have co-created it. Its realisation depends on the wider community.	

Source: Own elaboration

As for the connections between social values and the visioning process, via the qualitative analysis we have seen that **there has been an evolution of visioning values as a consequence of the process** itself. For instance, in the leadership group there were more sceptical statements prior to starting the foresight exercise than there were after the process was finished. This entails there is a bilateral impact, pre-existing visioning values shaping the process, but also the process impacting in the visioning values. This suggests a necessity for a

modification of the framework, shifting from a unilateral to a bilateral arrow. This also reinforces the importance of the ex-ante and ex-post application of the framework in processes to assess the evolution, comparison that was not explored in the present dissertation.

Figure 5.5 Evolved three stages of the ways social values influence normative foresight



Source: Own elaboration

Cultural readiness

In order to construct shared visions, as defined in the theoretical framework (i.e. a statement that is inherently about the future, normative, action-oriented and imagined collaboratively) (see 2.2.7.2), it is necessary for society to exhibit high levels of locus of control and trust. Without this, society will not be culturally "ready" to undertake such a process. Cultural readiness (Panizzon & Barcellos, 2019) for normative futures implies the presence of these two values (among possibly others). Conversely, cultural readiness for explorative foresight would require other visioning values, such as a sense of a high level of predetermination of the future.

These values may need to be particularly strong in leaders, as evidenced in the Euskadi 2040 process, as higher levels of these values among leaders encourage the initiation of such a process and support its participatory nature. Once the process is initiated, the process itself has the capacity to engender a sense of empowerment among participants, thereby fostering an increase in their level of trust, both in general and in relation to the administration and governments.

Non-exhaustive categories and non-linear process

From the outset, it has been asserted that value categories developed in the framework are not closed and that there are values that can be considered a visioning value, vision value, or vision-action value, depending on the vision theme. This has been proved by, for instance, the emphasis on collaborative governance identified in the post-materialism vision value, which

connects deeply with the “participation” dimension of visioning values. Similarly, the decision of not prioritising any of the dimensions of the vision over others (which is treated as a vision value) in the development of the shared vision is indivisible from the vision-action values. **The extent to which the resulting vision intersects with the two identified categories will be contingent upon the scope or theme of the vision itself.**

In summary, the framework demonstrates the dynamic interplay between visioning, vision, and vision-action values, while also emphasising their contextual adaptability. Pursuing normative foresight processes, particularly shared vision processes, requires certain foundational values within the territory, such as trust and locus of control. In contrast, vision and vision-action values are predominantly shaped by the thematic focus of the foresight exercise. This is why it is essential that also this dissertation establishes the domain in which it operates, i.e. competitiveness for wellbeing. Absent such specification, it would be very difficult to ground vision values and vision-action values. These two categories are highly interconnected and mutually influential, as the application of a value to specific situations and its prioritization over others provide essential insights into the content of the vision value itself.

Thus, the objective of the application of the conceptual-analytical framework is not to fictitiously divide the process of visioning, the outcome and its implementation; they are all necessary and indivisible stages for the development of a shared transformative vision. However, it is crucial to recognise the existence of these stages, as artefacts to better understand reality, and the influence of social values on all of them (and not exclusively the process or the outcome, as argued by other authors), for a comprehensive understanding of the influence of social values on the generation of shared visions in the field of competitiveness for wellbeing.

Chapter VI

Conclusions and recommendations

This concluding chapter synthesises the key insights and contributions of the dissertation. For this purpose, it begins by summarising the main findings and the original contributions made to the fields of futures domain, social values, and competitiveness for wellbeing. Following this, the implications of these findings are explored, accompanied by targeted recommendations to activate transformative shared visions for the future in territories. Finally, the chapter identifies promising directions for future research to continue deepening our understanding on the topic.

6.1. Main results and contributions

The main objective of this dissertation has been to “understand how social values influence shared vision development processes in the field of competitiveness for wellbeing”. For that purpose, I have bridged different strands of the literature (on social values and futures domain primarily) in order to develop a new integrated framework explaining the impact of social values in shared visioning exercises. The framework has been built on the bases of theoretical and experiential learnings and tested on the regional visioning exercise Euskadi 2040.

With a view to explore the main results and contributions of this dissertation, a re-examination of the specific objectives outlined in the introduction will be conducted. Each objective will be reviewed, along with the process undertaken to address it and the contribution made.

On the topic of social values

- The *Specific Objective 1* aimed at defining the concept of social values for a specific population group and temporal context. This objective has been addressed mostly from a theoretical perspective on the literature review of the social values concept on [Chapter II](#). Social values have been characterised in this dissertation as, **learnt beliefs that define what is preferable and serve as guiding principles for human conduct**. They exhibit a socio-cultural and dual character, can be ranked hierarchically, and are both trans-situational and variable (Argadoña, 2000; Frondizi, 1956; Hofstede et al., 2010; Jacoby, 2006; Jenkin, 2016; Penas Castro, 2008; Rohan, 2000; Schwartz, 2006; Sen, 2004; Zubieta et al., 2012).
- The *Specific Objective 2* consisted of analysing “the evolution of values influencing normative futures in the domain of competitiveness for wellbeing in Euskadi, providing a comparative perspective with various European welfare culture models and incorporating gender and generational perspectives”. This objective has been addressed in [Chapter V](#), via the application of the developed conceptual-analytical framework to the Basque region using mixed-methods.

Results have shown that the region demonstrates cultural readiness for visioning exercises. This readiness is reflected in its relatively high locus of control (despite a slight decline) and increasing levels of trust, particularly among leaders. Analysis of post-materialism values further highlights a pronounced emphasis on the value of shared decision-making across various domains, including the workplace, community, and political sphere. Consequently, Euskadi is well-positioned to adopt collaborative governance approaches closely aligned with the development and implementation of shared visions.

However, the vision-action values present a more inconclusive picture. There is no shared perspective on the compatibility between economic growth and environmental protection, and notable social tensions persist regarding the dilemma between dynamic cultural evolution and language preservation. These are critical issues that require continued

attention. Thematic visioning exercises focusing on these relationships would be highly beneficial, providing a deeper understanding of these dynamics and fostering pathways toward consensus and collaborative action.

In this objective, four hypotheses were proposed. A summary of the confirmation or rejection of these hypotheses is presented below:

- H1: *There is a trend towards post-materialist values (of personal expression) in the Basque Country.* Post-materialism has been analysed in this dissertation as a vision value. Despite certain materialist values (such as high level of economic growth) are highly appreciated by the Basque population, the classical postmaterialist index developed by Inglehart reveals that the Basque population exhibits a markedly higher level of postmaterialist orientation than the European average in the most recent wave, and it has considerably grown since 2008. Therefore, this hypothesis is **confirmed**.
- H2: *The importance of the value of work is lower in younger generations.* The importance of work has been analysed as a vision-action value, within the work-life balance dilemma (see [Chart 5.21](#)). This hypothesis has been **rejected**, since the importance of work is higher for the three youngest cohorts (Generation X, Millennials and Generation Z), and lowest among the two oldest generations (Silent Generation and Baby boomers). It can be seen that the importance attached to work compared to other aspects of life can be closely linked to life stage of individuals, being older generations usually more stable at work, and/or closer to or in retirement. That being said, it is notable that the importance of leisure time has increased especially in youngest cohorts in the last wave.
- H3: *Euskadi has a higher locus of control than the European average.* Freedom of choice or locus of control has been analysed as one of the key visioning values. The region shows a quite high locus of control during the last wave (7,11 out of 10), however, comparatively, the value has decreased from the 2008 wave, and it is lower than the European average (7,21), and other comparable territories such as Spain (7,38) and Finland (7,82). Therefore, this hypothesis is **rejected**.
- H4: *Gender differences on locus of control have decreased in the last decade in the Basque Country.* This hypothesis has been **rejected**, as male respondents (7,22) show higher locus of control than female respondents (7,01), and the gender gap has slightly widened since 2008 in the Basque Country. There is a north-south divide as female respondents in Germany, Finland, and Great Britain have a higher sense of freedom of choice in the most recent study, whereas, in Spain there are no gender-related differences. That is, in the European average, male respondents show higher locus of control than female respondents, similarly to Euskadi.

This finding is indicative of a challenge in consolidating progress in the area of gender equality, a conclusion that is further substantiated by some findings of other recent studies. Notwithstanding the so-called 'equality mirage' (a substantial proportion of the public believes equality between women and men has already been achieved), the Gender Equality Index data shows little advancement in the last decade, estimating that

“at the present rate of progress, it will require three generations to achieve gender equality” (Silvestre, 2023, pp. 195–196). The underlying causes of this phenomenon are attributed to the failure to adequately address structural inequality of public policies, that merely target the consequences of the structural inequality, rather than an in-depth questioning of the entire model (Serrano et al., 2023, p. 22).

On the topic of shared vision

- The *Specific Objective 3* consisted of a definition and characterisation of a concept that is so widely used, that results elusive, and sometimes clichéd (Conway, 2015): that of “shared vision”. This objective has been theoretically addressed in [Chapter II](#) (see 2.2.7.2). In this dissertation, a shared vision has been defined as **a normative, and action-oriented image of a better future imagined in a collaborative way**. This means it is a statement that is inherently about the future and should not be employed as a synonym of view, opinion or worldview (Fitzgerald & Davies, 2022; van der Helm, 2009). However, a shared vision is normative, and it is constructed precisely building on those worldviews or value-systems (Fitzgerald & Davies, 2022; Ramírez & Wilkinson, 2016). Similarly, a shared vision needs to be transformative and bring about societal change (Dator, 2019; Hines & Bishop, 2015; E. Masini, 2006; Stevenson, 2006; van der Helm, 2009). For a vision to be shared, it has to be imagined collaboratively, enhancing democratisation and responsiveness towards people’s needs (Campbell, 2023). The Euskadi 2040 process has demonstrated that there is considerable divergence in the understanding of what a shared vision is, thereby underscoring the necessity for its definition, that would align expectations.
- The *Specific Objective 4* aimed at exploring “how a shared vision-building process can be effectively conducted within a specific territory”. This objective responded to a gap in the literature pointed out by Sotarauta and Beer (2021), but also responded to the practical need of the construction of a shared vision for Euskadi. For this purpose, first a theoretical review has been performed, setting the scene of the diverse existing visioning process models, such as the 7-step Manoa School visioning process (see [Chapter II](#) and concretely, 2.2.7.2). Building on the theoretical basis, a comprehensive description of the step-by-step process that illustrates how Euskadi’s shared vision has been developed is provided in [Chapter III](#), by the case study description. In summary, the process featured three key phases. The first phase involved diagnostics in three areas: an analysis of Euskadi’s past competitiveness drivers, an assessment of current competitiveness for wellbeing, and an examination of megatrends with potential impacts on the region. The second phase focused on the visioning process itself, during which a shared vision was developed alongside a participatory mapping of competitiveness challenges. This visioning and backcasting process was conducted at multiple levels (municipal and provincial), involving multiple actors (including stakeholders from the business sector, third sector, labour unions, youth, and international experts), and across government departments (within the Basque

Government). In addition to the vision statement, the process produced a panel of indicators to monitor progress toward the vision and a shared agenda to bring it to fruition. The example has potential for inspiration for other relatable territories, both at national and sub-national levels.

On the intersection of social values and shared vision

- The *Specific Objective 5* refers to “Conceptually and analytically understand how social values influence shared vision development processes at the territorial level”. To achieve this objective, several steps have been undertaken.

First, a **comprehensive review and systematisation of the literature at the intersection of social values and futures domain** (see 2.3) has been performed, particularly normative foresight. Both areas are inherently multidisciplinary: social values have been examined from diverse perspectives such as philosophy, psychology, sociology, economics, and pedagogy (Martí Noguera, 2011). Similarly, the futures domain lacks a common disciplinary background, with contributors from physics, ethics, sociology, engineering, and beyond. This diversity renders the field not only varied but also fragmented. Futures domain is undoubtedly a transdisciplinary field (W. Bell, 2009). The inherent complexity of addressing each thematic area is considerable, and attempting to integrate them amplifies the challenge. Therefore, the systematic synthesis of the existing literature at their intersection represents a key contribution of this dissertation on its own. Key insights from this review include the recognition of the irrefutable interconnectivity between social values and futures studies (Harmáčková et al., 2023; Kuosa, 2012; Loveridge, 2009; Mannermaa, 1986; E. Masini, 2006; Mills & Wilner, 2023), despite its relative underexploration. The majority of the existing, albeit limited, literature focuses on the effects of social values (or culture more generally) on futures (Andersen & Rasmussen, 2014; Keenan & Popper, 2008b). Social values play a direct role in three core elements of foresight exercises (Douglas, 2009; Shala, 2018): the theme, the method, and the degree of participation. Furthermore, social values at three levels—individual, organisational, and national—are identified as crucial factors in assessing cultural readiness for engaging in foresight activities (Panizzon & Barcellos, 2019).

Second, is the development of a **conceptual and analytical framework** that explains the ways in which social values influence shared visioning processes in the field of competitiveness for wellbeing. The framework, developed in [Chapter IV](#) (based on existing theoretical knowledge and key experiential learnings of the case study) and tested in Chapter V, somehow contributes to disentangling the “dark forest of values” (Haidt & Kesebir, 2007) that play a role in imagining the future but also on acting upon it. Among the multiple existing futures, social values limit preferable futures, and they also determine where, if any, the shared vision is situated. Different existing distributions of values on the population can enable or disable the existence of a shared vision in the territory. Social

values impact three stages of the process of constructing a shared vision, resulting in a categorisation of values: the process (visioning values), the outcome (vision values) and the implementation of the vision (vision-action values). When analysing values their level is important (i.e. whether they are individual, organisational or territorial values); however, when analysing values in a process, I argue, the role played by those who “own” the values (either leadership or participant roles) must also be taken into account, as it has a distinct impact. Visioning values are predominantly marked by leadership values, whereas vision values are predominantly established by participant’s level of values (if it is indeed collaboratively imagined). Vision-action values, that is, the values that affect if and how the vision is taken into action are marked by territorial values, as the shared vision has the vocation to impact the entire territory. For the latter, it is imperative to emphasise the importance of incorporating a high representativity of competing interests within the territory as a fundamental aspect of the process of establishing a shared vision.

- The *Specific Objective 6* aims at identifying “key recommendations from the perspective of social values to enable policymakers to implement robust and effective shared vision-building processes that are transformative”. This objective has not yet been addressed in the dissertation, and it will be tackled within the next section of this concluding chapter. This is due to the fact that the recommendations constitute an additional reflection by this author, building on all the results of the thesis to go further and propose ways to address identified gaps or highlight key areas for further development.

Once all the specific objectives have been addressed, as mentioned in the introduction, the ultimate goal was to drive transformation toward more sustainable and inclusive desirable futures. To achieve this, the thesis makes one final additional contribution, which is: the use of the **action research for territorial development methodology** (J. Karlsen & Larrea, 2014) to study social values within the field of futures studies. While much of the existing values literature relies on quantitative approaches, including the most prominent authors’ value frameworks (Hofstede, 2001; R. Inglehart & Welzel, 2005a; Rokeach, 1973; Schwartz, 2006), there are also emerging alternative qualitative perspectives (Argadoña, 2000; Espedal et al., 2022b; Nowack & Schoderer, 2020; Rohan, 2000). In the futures domain, substantial work has been conducted on methods, yet significant gaps remain in epistemological and methodological exploration (understood as the philosophical foundations of research) (W. Bell, 2009). This dissertation is innovative in adopting a pragmatic and participatory approach through the ARTD methodology, which is compatible with mixed-methods analysis, which aligns with the critical realism standpoint (W. Bell, 2009; Gong, 2024). Additionally, the analysis identifies a novel application of EVS data, which, when connected to WVS data, offers an expansive resource with considerable potential for further exploration. These methodological advancements contribute to a more pluralistic and integrative understanding of social values in the context of futures.

This study has several **limitations** that should be acknowledged. First, the framework has only been tested in one single case study. Second, while EVS provided valuable data, it was not explicitly designed for this specific purpose, limiting the availability of certain variables. This constraint prevented deeper exploration of some relevant values that warranted greater emphasis but were not sufficiently addressed by EVS. Third, the proposed framework could not be applied *ex ante* as well as *ex post* to the case study to assess the evolution of values over time, which would have offered additional insights into the dynamics of social values in visioning exercises. Lastly, the temporal scope of the case study presents a limitation, as on the one hand, the only EVS data available was prior to the starting of the Euskadi 2040 process. On the other hand, the recent implementation of the case study precludes the ability to evaluate the long-term impact of the shared vision or its potential outcomes.

6.2. Implications and recommendations

The ultimate aim of the dissertation, beyond the intellectual or intermediary research objectives is to offer support to lay the foundations for the cultivation of a more culturally prepared and cohesive society, that is capable of developing a shared vision that enables transformation towards more desirable futures. For this reason, the following section will provide a further reflection accompanied by several recommendations built from the above-summarised results, addressing the Specific Objective 6.

In the context of values, it is important to clarify the distinction between the colloquial use of the term and the conceptualisation employed in this study, as informed by the literature. In various contexts, “having values” is often equated with adhering to specific socially accepted (moral) values, such as honesty, tolerance, or generosity—qualities commonly associated with the collective good. Conversely, individuals who do not espouse these socially endorsed values may be accused of “lacking values.” (i.e. lacking moral values). Nevertheless, this study adopts a more nuanced understanding of values, grounded in the notion that values are inherently dual (e.g., individualism versus collectivism). From this perspective, all individuals possess values; **the question is not whether values are present but rather which values are prioritised**. This distinction shifts the focus from moral judgments to the systematic identification and analysis of value orientations, enabling a more comprehensive exploration of their role in shaping vision and action.

In a similar vein, this dissertation is not focused on identifying the right or “healthy” values (Burr et al., 2011; Deci & Ryan, 1985; Oishi et al., 1999) to support development; instead, it is focused on increasing societal cohesion, leading to an increase in value congruity (decreasing internal conflict) (Sagiv & Schwartz, 2000) via shared visions for the future that is place-based (Huggins & Thompson, 2015).

To continue, establishing the importance of creating territories with shared visions is paramount. A shared vision can serve as an end in itself, as previously argued, given its potential to guide present actions toward a more desirable future. Beyond its intrinsic value, however, a **shared vision is also a foundational prerequisite for contemporary governance approaches** that emphasise integration, collaboration, and alignment of diverse actors. One notable example is the “whole-of-government approach” (Pontikakis et al., 2022), where it is

argued that “in addition to using traditional tools of command and finance, it is essential to mobilise hearts and minds around a shared vision on what needs to be achieved.” (Boekholt & Mulgan, 2023, p. 9). Similarly, a shared vision has also been argued to be the first step in the initiation of a regional development strategy (Stimson et al., 2009). The role of a shared vision, therefore, extends beyond guiding individual actions, becoming the glue that binds multi-level, cross-sectoral efforts. This enables governance frameworks and strategies that are place-based, congruent with existing value-configurations and capable of addressing the complexity of contemporary societal and territorial challenges.

In order to address those challenges, Harmaakorpi (2006, p. 1087), by merging futures domain with regional development literature, argues the need for five dynamic capabilities in the region in order to build and sustain competitive advantage: innovative capability, learning capability, networking capability, leadership capability and visionary capability. The last, visionary capability, is defined as “a region’s ability to outline possible potential development trajectories based on paths travelled and utilising the opportunities emerging with the changing techno-economic paradigm” (Harmaakorpi & Uotila, 2006, p. 787).

In relation to the mentioned literature, and when scaling the three stages identified in a shared visioning process up, these stages can be translated into three capabilities that a region must develop. Thus, the following distinction can be made between the capabilities of cultural readiness for visioning, visionary capability and transformative capability. The three procedural capabilities are discussed in more detail below.

Cultural readiness is defined as a homogeneity in social values regarding the visioning process. As explained in the Analysis chapter, the extent to which a society is prepared to engage in a process of shared vision construction is determined by its prevailing social values. This process requires a high level of trust and locus of control, i.e. a high perception of having a say in future trajectories, and confidence in doing so collectively. In the event of the predominant values being different, it could not be said that the region does not have cultural readiness. Instead, it would be culturally ready, albeit for a different purpose. Consequently, alternative approaches to futures, such as explorative foresight (Kuosa, 2012) via the study of trends, the generation of scenarios, etc., could be considered.

Visioning capacity in this case refers to the ability of a region to collectively define its preferred future trajectory. It would not just be a matter of exploring 'potential development trajectories based on the past', as Harmaakorpi and Uotila (2006) argue, but would imply the ability to collectively and democratically choose which of the existing possibilities is preferable. This is an important nuance, as it is understood that the motivation and mobilisation to pursue the preferred vision will be greater, activating or pulling more collective power in its direction.

Finally, the concept of transformative capability entails the alignment of vision-action values in the territory, signifying a shared understanding of how to translate the selected shared vision into actionable steps that orient the present toward a preferable future. It is a collective capability not only to co-create a desirable future but also to take individual and collective steps toward its realisation. Achieving this requires emphasising the *eutopic* (as opposed to *utopic*) nature of the vision (Anders, n.d.; Dator, 2017). A *eutopic* vision acknowledges and explicitly addresses potential conflicts and dilemmas, fostering meaningful dialogue and enabling

stakeholders to confront difficult conversations. Otherwise, visions risk becoming hollow aspirations devoid of transformative power. This aligns with Campbell's (2023) notion of the challenge visions face in achieving real impact on policy production and action. This necessity of understanding value systems is also argued as important by Fratesi (2025) in the new era of trade-offs that regional policy is expected to be facing.

A transformative shared vision for the territory can only be achieved through agreement and a shared culture around visioning, the vision itself, and vision-action values, understood as an iterative and dynamic process. The absence of any of these elements undermines the result.

The process in the Basque region has also demonstrated a certain absence of futures literacy, both among the leadership team and the participants, as expressed by participants (see 5.2.2.2). It is therefore important to **promote strategies to foster futures literacy**. Miller (2015) defines futures literacy as "the capacity to design and implement processes that make use of anticipation, generally with the purpose of trying to understand and act in a complex emergent context". Karlsen (2021) highlights the importance of reflecting on the past, sensemaking the present and employing that knowledge for anticipating the future. There is a necessity for enhancing reflective capacity within these three domains:

- *Disseminating the potential of the futures domain:*

A critical step is to expand awareness of the broad potential of the futures field for regional development. The evolution observed in the visioning values from one of the political leaders (from associating foresight solely with predictions to understanding it as a multifaceted domain) underscores this need (see 5.2.2.1). Indeed, futures domain must be disseminated according to its wide-ranging applicability across political, business, and organisational contexts. Disseminating the existing numerous methods or futures "toolkit" (Inayatullah, 2008; Popper, 2008; Voros, 2003) of this transdisciplinary field (W. Bell, 2009) is essential for unlocking its potential.

- *Mainstreaming the definition of (shared) vision:*

Throughout this dissertation, it has constantly been mentioned that the concept of "vision" is widely used but often misunderstood or overgeneralised. Due to its frequent usage, there is a lack of clarity on what constitutes a vision, leading to varied and often incompatible interpretations. Mainstreaming the definition provided in this dissertation, particularly the characteristic of action-oriented, will facilitate access to shared visioning processes and mutual comprehension among participants.

- *Fostering systemic thinking:*

The Euskadi 2040 process, especially during the interdepartmental visioning and backcasting exercise (see 3.2.2.4), revealed a tendency for stakeholders and departments to focus exclusively on areas within their jurisdiction. To adopt a holistic approach to complex problems such as competitiveness for inclusive and sustainable wellbeing, it is crucial to move beyond sectoral perspectives and consider the bigger picture (Matti et al., 2023). This does not imply abandoning specialisation; it has its *raison d'être* and "should not always be seen as a symptom of obsolete thinking" (Pontikakis et. al., 2022, p. 104). Rather, it involves acknowledging interdependencies and the broader impacts of decisions.

The involvement of young people in future-building processes is often emphasised, as they are both the architects and inheritors of the future. Young people's expectations of the future hold significance not only for themselves but also for society as a whole (Eckersley, 1999), as they are among the potential agents of change shaping the future (Percy-Smith & Burns, 2013). Furthermore, young people are seen as key representatives of future generations, entrusted with safeguarding their rights (Declaration on the Responsibilities of the Present Generations Towards Future Generations, 1997; Szabó, 2023). In this context, it is worth considering the inclusion of **children in shared visioning processes**. Research confirms, in line with the socialisation hypothesis, that values tend to crystallise at an early age. Moreover, shared visioning processes can actively contribute to "shaping" values (Monteiro & Dal Borgo, 2023; Panizzon & Barcellos, 2019). Engaging children in shared visioning exercises has the potential to foster more cohesive future generations equipped with stronger social capital, better preparing them to adapt to the challenges and realities to be faced. In addition, their direct involvement will help to ensure that they are not considered as a homogenous group, showing their diversity and intersectionality.

On another note, leadership has emerged as a key factor in this dissertation, particularly through the key experiential learnings derived from the case study. Similarly, vision and leadership are frequently discussed together in the literature (Griffin et al., 2010; Mariasse, 1985; Nanus, 1992). However, this dissertation highlights the **major role that the social values of leaders play in shared vision development processes**, including kicking off the initiative, the design of the process, participation in the content and form of the resulting vision, and an active role in its implementation. One key implication of this is the importance of understanding the values of the leaders we choose. Their value orientations are as critical -if not more so- than the proposed project or their knowledge and background, as it has been evidenced by demonstrating the extensive reach of their influence. A recent study (Arantzazulab, 2023) shows that over half of the Basque population (54.9%) prefers that leaders have values and ideas that contribute to the improvement of society over specialist knowledge in their area. The same study shows that a vast majority of Basque citizens (73.7%) prefer a government with principles and values over efficacy.

It is pertinent to introduce at this stage the concept of place-leadership, which emerges from the literature on regional studies. Sotarauta (2021, p. 152) defines place-based leadership as "the mobilisation and coordination of diverse groups of actors to achieve a collective effort aimed at enhancing the development of a specific place". Various types of agents can assume the role of place leaders, including academic, business, civic, and, of course, political actors (Hambleton, 2015; Sotarauta & Beer, 2021).

The case study of Euskadi 2040 presents an innovative approach to leadership, with two distinct types of actors (political and academic) sharing leadership responsibilities. This model of shared leadership (Izulain et al., 2024) combines different types of expertise, positioning the group more effectively to fulfil the diverse roles required. Additionally, the convergence of different interests in leadership helps to make explicit the varied values at play, facilitating their discussion, negotiation, and consensus-building. This approach is more likely to reflect territorial interests as a whole. Therefore, it is advisable to promote shared leadership models,

encouraging collaboration among diverse actors according to the specific theme or goal of the shared vision, keeping in mind the potential bias towards organisational values.

The shared leadership model outlined in this dissertation is facilitated by the methodology employed, namely ARTD. Foresight, in its contemporary definition, is described as a “medium-to-long-term vision-building process aimed at present-day decisions and mobilising joint actions” (EC, 2001, p. 3). Similarly, values are understood as “characteristics of human action” (Penas Castro, 2008; Rohan, 2000; Sen, 2004).

The strong action orientation inherent in both futures domain and values studies makes action-research methodologies, such as ARTD and participatory action research, particularly well-suited. By emphasising both reflection and action, they facilitate the co-creation of knowledge, and the implementation of strategies aimed at driving meaningful change. Moreover, ARTD serves as an effective “umbrella” methodology, allowing for the integration of mixed methods approaches (Coghlan & Shani, 2018; Greenwood & Levin, 2007). This flexibility enhances its adaptability to diverse contexts and objectives, making it an invaluable tool for territorial development and shared visioning exercises.

Lastly, from the broad array of methods available in the futures domain, this dissertation focuses on shared vision-building. However, other methods are equally significant, both independently and as complementary tools to visioning. For instance, (mega)trend analysis (Kuosa & Stucki, 2021; Puglisi, 2001) was employed in the case study as a future intelligence-gathering tool. Trends can also serve as valuable instruments for identifying vision-action dilemmas; for example, the trend of decreasing work importance has been highlighted as part of such a dilemma, reflecting potential conflicts between emerging innovations and the status quo.

Similarly, despite the fact that this tool was not explored in the case study, within the visioning process of the Manoa School, “experiencing alternative futures” through scenario building was a critical step toward achieving a shared vision (Dator, 2017). Scenarios, which can be significantly influenced by values, offer an effective way to construct alternative futures based on differing social values. By imagining futures rooted in diverse value orientations, scenarios enable deeper reflection on values as limits of the preferable.

6.3. Further research

This dissertation offers a robust framework for analysing the interplay between social values and shared visioning exercises, paving the way for further research across multiple dimensions. Below several of the potential points for further research are described:

Expanding the application of the conceptual-analytical framework

- Comparative analysis across regions: While this study has focused on European welfare cultures, future research could expand to foresight processes in diverse welfare culture regions, leveraging the World Values Survey (WVS) dataset to enhance global comparability. In addition, the accessibility to case studies of visioning process in other regions, in Europe and beyond, could also offer additional insights into how the diverse stages play a role in

different contexts, allowing qualitative comparative analysis. This research line could build on work carried out by Keenan and Popper (2008b) on different foresight styles.

- Longitudinal application: Applying the framework in a single case ex ante and ex post would allow for a detailed examination of changes in values and their impact on shared visioning.

Deepening the conceptual-analytical framework

- Incorporating alternative value frameworks: The framework has been constructed mainly following Inglehart's work. Therefore, it could be enriched by integrating data and concepts from seminal authors such as Hofstede and Schwartz, offering new perspectives on value orientations. Indeed, Hofstede's cultural dimensions have already, partly, been explored in their connection to futures domain in the literature (Andersen & Rasmussen, 2014).
- Value categories taxonomy development: Developing a detailed taxonomy of values for each stage of the shared visioning process would provide clearer analytical tools for future research and framework applications.
- Tailored instruments: Creating bespoke questionnaires could enable a more nuanced analysis of the three-stage value framework proposed in this dissertation.

Specific insights for Euskadi

- Measuring "stability": The EVS does not include "stability" as a preferable job quality among the options. However, the case study process has led to the emergence of stability as a quality highly valued by young people in a job position. Either the next EVS wave should incorporate measures of "stability" as a key quality valued in the workplace, or thematic analysis should be made, reflecting on its importance in the Basque Country.
- Perceptions of sense of freedom/locus of control: Further research is needed to clarify whether the observed decrease in the sense of freedom stems from a belief in predetermined futures or a perceived lack of individual agency to effect change.
- Addressing key dilemmas: Additional shared visioning exercises should focus on the three critical dilemmas identified in this study: (1) balancing environmental protection with economic development, (2) preserving cultural identity while embracing openness, especially in light of expected migration increases, and (3) navigating evolving work dynamics and ethics and intergenerational dialogue. This line could build on instruments such as the Rokeach values survey and the Schwartz values survey, since they focus on the hierarchy of values.

To conclude, attention must also be given to the evolving normative and legal constructs surrounding "future generations." These developments, particularly in the context of human rights legislation, may impose additional constraints on shared visioning processes. This underscores the importance of aligning individual and collective values with legally permissible frameworks to ensure actionable and inclusive visioning outcomes.

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Appendix I Leader's questionnaire



EUROPEAN VALUES STUDY 2017

Questionnaire Spain

(Spanish)

Preguntas seleccionadas

«Los datos obtenidos de este cuestionario serán anónimos y tratados confidencialmente. Se utilizarán exclusivamente para elaborar la tesis doctoral. Cualquier información identificable será eliminada para garantizar la privacidad de los participantes.»

Q1. Dígame, por favor, qué grado de importancia tiene en su vida cada uno de los siguientes aspectos:

		muy importante	bastante importante	no muy importante	nada importante	No sabe	No contesta
v1	Trabajo	1	2	3	4	8	9
v2	Familia	1	2	3	4	8	9
v3	Amigos y conocidos	1	2	3	4	8	9
v4	Tiempo libre/de ocio	1	2	3	4	8	9
v5	Política	1	2	3	4	8	9
v6	Religión	1	2	3	4	8	9

Q7. ¿Diría usted que, en general, se puede confiar en la mayoría de la gente o bien que nunca se es lo bastante prudente cuando trata uno con los demás?

- 1- Se puede confiar en la mayoría de la gente
- 2- Nunca se es lo bastante prudente
- 8- No sabe (espontánea)
- 9- No contesta

Q9. Algunas personas piensan que tienen completa libertad de elección y control sobre la manera en que se desarrolla su vida, otras piensan que lo que hacen por sí mismas no produce ningún efecto real sobre lo que les sucede. Utilice, por favor, esta escala para indicar cuánta libertad de elección y control piensa Vd. que tiene sobre la manera en que se desarrolla su vida

(v38)

ninguna
1

2

3

4

5

6

7

8

9

10

muchísima
88

No sabe
99

No contesta

Q11. Aquí hay algunos aspectos de un puesto de trabajo que la gente dice que son importantes. Véalos, por favor, y dígame cuáles piensa Vd. personalmente que son importantes en un trabajo.

			mencionado	no mencionado	No sabe	No contesta
v40	A	Buenos ingresos	1	2	8	9
v41	B	Buen horario	1	2	8	9
v42	C	Oportunidades de tomar iniciativas	1	2	8	9
v43	D	Amplias vacaciones	1	2	8	9
v44	E	Un trabajo en donde piensas que puedes lograr algo	1	2	8	9
v45	F	Un trabajo con responsabilidades	1	2	8	9
v45a	G	Ninguna de las anteriores (respuesta espontánea)	1	2	8	9

**Q28. De la siguiente lista de cualidades que los niños y niñas pueden llegar a aprender en casa, ¿Cuáles cree usted que son las cinco cualidades principales que todo niño debería tener?
¡Elija sólo cinco!**

			mencionado	no mencionado	No sabe	No contesta
v85	A	Buenos modales	1	2	8	9
v86	B	Independencia	1	2	8	9
v87	C	trabajo duro	1	2	8	9
v88	D	sentido de responsabilidad	1	2	8	9
v89	E	Imaginación	1	2	8	9
v90	F	tolerancia y respeto por los demás	1	2	8	9
v91	G	Sentido de la economía y espíritu de ahorro	1	2	8	9
v92	H	Determinación, perseverancia	1	2	8	9
v93	I	Fe religiosa	1	2	8	9
v94	J	Abnegación	1	2	8	9
v95	K	Obediencia	1	2	8	9
v96	L	Ninguna (espontánea)	1	2	8	9

En esta tarjeta tiene Ud una serie de visiones opuestas sobre varios temas. ¿Cómo situaría Ud.sus opiniones en esta escala?

Q32C

--	--

(v105)

La competencia es buena										La competencia es perjudicial		
1	2	3	4	5	6	7	8	9	10	No sabe	88	No contesta
												99

Q33.

Se habla mucho hoy en día sobre cuáles deberían ser los objetivos de este país para los próximos diez años. En esta tarjeta hay varios objetivos a los que diversas personas darían prioridad. ¿Podría decirme cuál, de entre estos, considera Vd. personalmente el más importante?

--

(v108)

Primera mención

- 1 Un alto nivel de crecimiento económico
 - 2 Asegurar que este país tenga unas Fuerzas Armadas importantes
 - 3 Lograr que la gente pueda participar más en cómo se hacen las cosas en su lugar de trabajo y en su comunidad
 - 4 Intentar que nuestras ciudades y nuestro campo sean más bonitos
-
- 8 No sabe
- 9 No contesta

Q33a

¿Y cuál le seguiría en importancia?

--

(v109)

Segunda mención

- 1 Un alto nivel de crecimiento económico
 - 2 Asegurar que este país tenga unas Fuerzas Armadas importantes
 - 3 Lograr que la gente pueda participar más en cómo se hacen las cosas en su lugar de trabajo y en su comunidad
 - 4 Intentar que nuestras ciudades y nuestro campo sean más bonitos
-
- 8 No sabe

Q34. Si tuviese que elegir, ¿cuál de los siguientes aspectos que aparecen en esta tarjeta diría usted que es más importante?

☐ (v110)

Primera mención

- 1 Mantener el orden en el país
 - 2 Dar más voz a la gente en las decisiones importantes que toma el gobierno
 - 3 Combatir el alza de los precios
 - 4 Proteger la libertad de expresión
-
- 8 No sabe
 - 9 No contesta

**Q35
¿Y cuál le seguiría en importancia?**

☐ (v111)

Segunda mención

- 1 Mantener el orden en el país
 - 2 Dar más voz a la gente en las decisiones importantes que toma el gobierno
 - 3 Combatir el alza de los precios
 - 4 Proteger la libertad de expresión
-
- 8 No sabe
 - 9 No contesta

Q37

Por favor, dígame, para cada uno de ellos, y suponiendo que éstos se produjeran, si Vd. piensa que sería algo bueno, algo malo, o le da igual:

		bueno	malo	Me da igual	No sabe	No contesta	
v113	Que disminuya la importancia del trabajo en nuestras vidas	1	2	3	8	9	

Q52A

Por favor mire las siguientes afirmaciones e indique dónde situaría su punto de vista en esta escala

Q52C.

(v187)

Los
inmigrantes
suponen
una
dificultad
para el
sistema de
bienestar
de un país

1 2 3 4 5 6 7 8 9

Los
inmigrantes
no suponen
una
dificultad
para el
sistema de
bienestar
de un país

No
sabe
11
No
contesta
12

Q52D

(v188)

Es mejor si
los
inmigrantes
mantienen
sus
costumbres
y
tradiciones
distintivas

1 2 3 4 5 6 7 8 9

Es mejor
que los
inmigrantes
no
mantengan
sus
costumbres
y
tradiciones
distintivas

No
sabe
11
No
contesta
12

Q53

Algunas personas dicen que los siguientes aspectos son importantes para ser realmente vascos. Otras dicen que no son importantes. ¿Hasta qué punto considera Ud. importante cada una de ellos?

		muy importante	bastante importante	no muy importante	nada importante	No sabe	No contesta	
v192	Saber hablar Euskera	1	2	3	4	8	9	

Q56

¿Me puede decir si está Ud. de acuerdo o en desacuerdo con las siguientes afirmaciones?

		Muy de acuerdo	De acuerdo	Ni de acuerdo ni en desacuerdo	En desacuerdo	Muy en desacuerdo	No sabe	No contesta
v199	Daría parte de mis ingresos si tuviera la certeza de que mi dinero se iba a destinar a evitar la contaminación medioambiental	1	2	3	4	5	8	9

Q57.

Aquí hay dos frases que la gente suele utilizar cuando se habla sobre el medio ambiente y el crecimiento económico. ¿Cuál de las dos se acerca más a su propio punto de vista?

☐ (v204)

- 1 Debería darse prioridad a la protección del medio ambiente, incluso si provoca un crecimiento económico más lento y alguna pérdida de puestos de trabajo
 - 2 Debería darse prioridad al crecimiento económico y a la creación de empleo, incluso si el medio ambiente sufre en alguna medida
-
- 3 Otra respuesta (CODIFICAR SOLO SI EL ENTREVISTADO LA SUGIERE)
- 8 No sabe (espontánea)
- 9 No contesta (espontánea)

Q62.

¿Qué debería proporcionar una sociedad? Dígame, para cada afirmación que le voy a leer, si para usted es importante o no:

		muy importante	bastante importante	no muy importante	nada importante	No sabe	No contesta	
v221	La eliminación de las grandes desigualdades de ingresos entre los ciudadanos	1	2	3	4	8	9	
v222	Garantizar que se cubren las necesidades básicas de todo el mundo en lo que se refiere a alimentación, vivienda, educación y salud	1	2	3	4	8	9	
v223	El reconocimiento de la gente por sus méritos	1	2	3	4	8	9	
v224	Protección contra el terrorismo	1	2	3	4	8	9	

Appendix II Table of equivalences EVS 2008 and 2017-2019 waves

TYPE	SOCIAL VALUES	EVS 2008	EVS 2017-2019
Visioning values	Freedom of choice and locus of control (1-10 scale)	Q10	Q9
	General trust (1-2)	Q7	Q7
	Trust in government (1-4)	Q63 v222	Q38 v131
Vision values	Post materialism index	Q60, Q61 (no equivalence with Q33)	Q33, Q34, Q35
	Values to be transmitted to future generations (list)	Q52 (v170-v180)	Q28 (v85- v95)
	Competition good/bad (1-10 scale)	Q58c (v196)	Q32c (v105)
	Individual vs State responsibility for providing for livelihoods (1-10 scale)	Q58a (v194)	Q32a (v103)
	Provision of society	N/A	Q62
Vision-action values	Personal commitment towards environmental protection (1-5)	Q85 v295	Q56 v199
	General commitment towards environmental protection (1-2)	N/A	Q57
	Importance of work, family, friends and acquaintances, free time, politics and religion (1-5)	Q1 (v1 – v6)	Q1 (v1 – v6)
	Important aspects in a job	Q14 (v69, v73, v74, v76, v78, v79)	Q11 (v40 - v45)
	Good/bad work importance decrease (1-3)	N/A	Q37 (v113)

	Immigrants strain on welfare system (1-10 scale)	Q78d (v271)	Q52c
	Better if immigrants maintain/not maintain own customs (1-10 scale)	Q78f (v273)	Q52d
	Speak the language (1-4)	Q80d* (Importance of speaking Spanish).	Q53d (Importance of speaking Basque)

Appendix III Presentation example

Competitividad para el bienestar de Euskadi 2040

Visión y Retos compartidos:
una reflexión para la acción



Sareen Sarea, 18 de Enero del 2023



1

Appendix IV Document factsheets

Document ID ²¹	Process stage	Actor	Date	Type of document
D3 -D31	All	Leadership group internal meetings	From 09/2021 to 05/2024	Systematisations and presentations
D32 - D34	Visioning and backcasting: multi-actor local	"Hidden champion" companies	3 meetings: 19/05/2022, 01/02/2023, 23/11/2023	Systematisations
D35	Visioning and backcasting: multi-level	Provincial Council of Bizkaia	22/03/2022	Systematisation
D36	Visioning and backcasting: multi-level	Provincial Council of Gipuzkoa	17/03/2022	Systematisation
D37	Visioning and backcasting: multi-level	Donostia- San Sebastian City Council	11/04/2022	Systematisation
D38	Visioning and backcasting: multi-level	Vitoria – Gasteiz City Council and EUDEL	20/04/2022	Systematisation
D39	Visioning and backcasting: multi-level	Bilbao City Council	25/03/2022	Systematisation
D40	Visioning and backcasting: multi-level	Provincial Council of Araba	20/04/2022	Systematisation
D47	Visioning and backcasting: multi-level	Parliamentary Commission	13/09/2022	Systematisation
D48	Visioning and backcasting: multi-actor local	Trade union- UGT	23/03/2023	Systematisation
D49	Visioning and backcasting: multi-actor local	Trade union- LAB	20/12/2022	Systematisation
D50	Visioning and backcasting: multi-actor local	Trade union- CCOO	31/01/2023	Systematisation
D51	Visioning and backcasting: multi-level	1 st interinstitutional session	15/09/2022	Systematisation

²¹ Document numbers have been assigned by Atlas.ti software

D52	Visioning and backcasting: multi-level	2 nd interinstitutional session	17/01/2024	Systematisation
D53	Visioning and backcasting: multi-actor local	Vocational training students	4 meetings: 19/04/2023, 27/04/2023, 25/04/2023, 28/04/2023	Summary of results
D54	Visioning and backcasting: multi-actor local	University students	3 meetings: 27-29 /09/2022	Summary of results
D55	Visioning and backcasting: multi-actor local	Basque Youth Council	18/03/2024	Systematisation
D56	Visioning and backcasting: multi-actor local	ASLE and Konfekoop	03/01/2023	Systematisation
D57	Visioning and backcasting: multi-actor local	Confebask, Adegi and Cebek	30/01/2023	Systematisation
D58	Visioning and backcasting: multi-actor local	Confebask	24/02/2023	Letter
D59	Visioning and backcasting: multi-actor local	Sareen Sarea	18/01/2023	Systematisation
D60	Diagnosis	ANEXO 3- Diagnosis on competitiveness for wellbeing	11/2021	Report
D61	Diagnosis	ANEXO 4- First Vision proposal	12/2021	Report
D62	Diagnosis	ANEXO 1- Competitiveness framework	09/2021	Report
D63	Diagnosis	ANEXO 2- Megatrend analysis	10/2021	Report
D67-D68	Visioning and backcasting: interdepartamental	Presidency- External Action	26/01/2023	Presentation and systematisation
D69	Visioning and backcasting: interdepartamental	Culture Department	26/03/2023	Systematisation
D70- D72	Visioning and backcasting: interdepartamental	Economy and Treasury Department	26/01/2023	Presentation, systematisation and letter
D73	Visioning and backcasting: interdepartamental	Health Department	20/03/2023	Systematisation

D74	Visioning and backcasting: interdepartamental	Work and employment Department	20/02/2023	Systematisation
D75	Visioning and backcasting: interdepartamental	Education Department	10/02/2023	Systematisation
D76- D77	Visioning and backcasting: interdepartamental	Security Department	19/06/2023	Systematisation and presentation
D78	Visioning and backcasting: interdepartamental	Presidency- Social transition and 2030 Agenda	08/02/2023	Systematisation
D79	Visioning and backcasting: interdepartamental	Presidency- STI Commissioner	08/02/2023	Systematisation
D81	Visioning and backcasting: multi-actor local	Adegi	13/02/2023	Newsletter opinion article
D82	Parallel to process	Forum Europa presentation	24/10/2022	Discourse transcription at event
D83	Parallel to process	Expectativas económicas Forum	12/12/2022	Discourse transcription at event
D84	Visioning and backcasting: multi-actor international	Advisory Board	13/09/2021	Systematisation
D85	Visioning and backcasting: multi-actor international	High level discussion with Wales Futures Generations Commissioner	25/02/2022	Systematisation
D86	Visioning and backcasting: multi-actor local	Orkestra Administration Council	14/10/2021	Systematisation
D87	Visioning and backcasting: multi-actor international	Orkestra Ambassadors	21/07/2023	Systematisation
D88	Outcomes	Multi-level shared Vision version	11/09/2022	Report
D89	Outcomes	Final version of vision	23/01/2024	Report
D90	Outcomes	First proposal of vision	11/02/2022	Report

Appendix V Vision Statement (Spanish)

Visión y Retos Euskadi 2040

En línea con el enfoque pluralista de la prospectiva, en el que se entiende que no existe un único futuro que haya que predecir, sino que existen múltiples futuros (Amini et al., 2021), el principal objetivo del proyecto ha sido definir cuál es el futuro deseado para Euskadi, es decir, qué orientación debe tener el modelo de competitividad que se quiere llevar a la práctica. Para ello, se trabajó en la construcción de una visión compartida entre diferentes agentes del territorio.

La construcción de una **visión compartida** significa cimentar una base común para la acción colectiva, aceptando y respetando las posiciones y percepciones de los actores del territorio (Sotarauta, 2019). Las opiniones divergentes pueden ser relativas, tanto a los retos existentes en el territorio, como a las causas de dicha problemática y/o sus potenciales soluciones. Por tanto, no se trata de llegar a un consenso, sino de buscar el **mínimo común denominador** entre las posiciones heterogéneas existentes, que permita comenzar a diseñar acciones en esa dirección. Una visión compartida entre los diferentes actores contribuye positivamente a la optimización de esfuerzos (eficiencia), y maximización de resultados (eficacia).

Se presentan a continuación la Visión y Retos Euskadi 2040 resultantes de un proceso de colaboración académico-política, multinivel y multi-agente que se presenta en el Capítulo 2.

¿Qué visión queremos para el 2040? Una Euskadi...

- **Líder en desarrollo industrial competitivo y sostenible.** Con una economía **próspera** y diversificada que garantiza el pleno empleo y la calidad de vida de todas las personas
- Que **empodere y capacite a todas las personas** para desarrollarse plenamente en una sociedad **inclusiva y equitativa**
- **Neutra en carbono**
- Pionera, **innovadora** y en continua transformación
- Un **lugar único**, que cultiva sus **singularidades**, acoge la **diversidad** y cuenta con una sociedad **comprometida** a nivel social, cultural, político y empresarial
- **Co-responsable** con el mundo y **referente** en el plano internacional

En definitiva, una Euskadi competitiva que apuesta por el bienestar de todas las personas, con corresponsabilidad intergeneracional y de manera solidaria con el resto del mundo. Un lugar diferenciado, atractivo para vivir y al que contribuir.

Ilustración 1: Visión Euskadi 2040



Fuente: Elaboración propia

Por mucho que se presenten de manera individual, las diferentes dimensiones **no se proyectan como compartimentos estancos**, sino que la incidencia en uno de ellos también tiene sus efectos en otras dimensiones, similar a lo que ocurre al tratar de solventar una cara en un “Cubo de Rubik”. El objetivo final de entenderla como una visión sistémica es ser conscientes de las interacciones entre las diversas dimensiones y conseguir una interacción y retroalimentación positiva entre todas las dimensiones. Por ejemplo, una Euskadi inclusiva tendrá mayor potencial de prosperidad, y cuanto mayor sea la prosperidad generada también repercutirá de manera positiva en la mejora de la capacidad de inclusión. Asimismo, también pueden darse interacciones conflictivas entre dimensiones, y una visión sistémica permite poner en marcha proyectos/iniciativas/programas para paliar dichos efectos negativos. Por ejemplo, la transición medioambiental generará pérdidas de empleo en sectores como la automoción tradicional, teniéndose que establecer medidas para recapacitar a las personas del sector y direccionarlas hacia otros sectores de actividad. Además del significado o sentido de cada dimensión, se identifican y presentan a continuación varios retos de competitividad al servicio del bienestar aparejados a cada dimensión.

Euskadi próspera

SENTIDO DE LA DIMENSIÓN

Dado el reto sociodemográfico y la evolución de la pirámide poblacional, la tasa de dependencia crecerá sustancialmente en los próximos años y esto genera **dificultades para la sostenibilidad económica del modelo de bienestar** vasco construido hasta hoy.

Mantener el desarrollo económico ineludiblemente comporta la **transformación de las actividades económicas y de las bases de competitividad**. La industria, seguirá cumpliendo un papel clave en la economía, si bien su protagonismo se verá reforzado por la relevancia de los servicios avanzados en conocimiento ligados al sector industrial. Seguir impulsando una

diversificación relacionada con las capacidades existentes, generar nuevas actividades económicas, aprovechar las oportunidades que plantean la transición energético-climática, tecnológico-digital y sociodemográfica y reducir la dependencia en cadenas de valor clave serán palancas importantes para la sostenibilidad económica de nuestro modelo de bienestar.

La construcción de una Euskadi próspera pasa por la disponibilidad de empleo para todas las personas, en los niveles y calidades adecuados. Desde el punto de vista del nivel, eso pasa por **aumentar la tasa de actividad y reducir el desempleo**. Y en lo relativo a la calidad, implica lograr el debido ajuste de los perfiles requeridos en los puestos de trabajo y las cualificaciones de las personas, así como **retribuir debidamente el trabajo realizado y ofrecer proyectos profesionales atractivos para el desarrollo de las personas**.

El **talento**, entendido como habilidades innatas sistemáticamente desarrolladas de las personas que se despliegan en actividades que les gustan, encuentran importantes y en las que quieren invertir energía y en las que se desempeñan excelentemente (Nijs et al., 2014), constituye un factor clave diferencial para la competitividad de Euskadi. Ser un **territorio atractivo** para que **el talento, desde donde esté**, pueda **aportar valor a la competitividad y bienestar de Euskadi**, va a ser fundamental.

RETOS PARA UNA EUSKADI PRÓSPERA

- Garantizar la **sostenibilidad económica**, que permita:
 - Orientación estratégica, tanto en los ingresos (fiscalidad) como en el gasto, de las oportunidades que nos da el Concierto Económico, generando también una conciencia ciudadana sobre su relevancia.
 - Margen de inversión para el futuro tanto en tangibles (infraestructuras físicas) como en intangibles (investigación, y desarrollo tecnológico). Para ello, valorar el impulso de un posible clúster financiero.
 - Mantener niveles de gasto y endeudamiento (públicos y privados) sostenibles, que posibiliten financiar servicios públicos además de contar con capacidad financiera para invertir en proyectos estratégicos.
 - Desarrollar una balanza de pagos exterior mantenida en parámetros razonables.
- Dinamizar la **diversificación productiva** a partir de las capacidades existentes, a través de la generación de nuevas actividades (emprendimiento e intraemprendimiento) y el aprovechamiento de nuevas oportunidades surgidas de las transiciones tecnológico-digital (p. ej. Euskadi como proveedor de Industria 4.0, ciberseguridad), energético-climática (economía circular, bioeconomía...) y sociodemográfica (incluyendo economía plateada). Como apuntala la estrategia RIS, los sectores estratégicos serán la industria inteligente, energías más limpias y la salud personalizada, y los territorios de oportunidad la alimentación saludable, ecoinnovación, ciudades sostenibles y Euskadi Creativa.
- **Reducir la dependencia e impulsar estrategias para garantizar la autosuficiencia o el abastecimiento** en las **cadenas de valor clave** para la competitividad del País Vasco y en

la **economía de lo fundamental** (salud, cuidados, energía, sector agroalimentario, modelo de comercio ...).

- Desarrollar un ecosistema competitivo para atraer proyectos empresariales que generen competitividad y bienestar
- Garantizar subsistencia de las cadenas de suministro locales y, en particular, apoyar la sucesión de pequeños proveedores que cuentan con gran conocimiento y son claves en la competitividad de las empresas a las que proveen.
- Generar **empleo de calidad** (estable, adecuadamente remunerado y con posibilidades de aprender y tener un desarrollo profesional), para todas las personas, principalmente para los jóvenes, teniendo en cuenta nuevas formas de relaciones laborales que están emergiendo.
- En vista del declive demográfico y de la población en edad de trabajar, fomentar la atracción del talento y las **capacidades y el aprendizaje continuo** de las personas.
 - Gestionar el relevo generacional y traspaso de conocimiento, tanto en el ámbito de las empresas como en la administración pública.
 - Desarrollar, atraer y poner en valor el talento (entendido en sentido amplio), a través de la oferta de oportunidades que permitan condiciones de trabajo competitivas y desarrollo profesional. Para ello, será importante contar con un pacto vasco por el talento.
 - Seguir impulsando una colaboración estratégica entre el mundo educativo y el mundo laboral para un aprendizaje y transformación mutua.
 - Desarrollar programas formativos (tanto en la universidad, centros de formación profesional como en formación para el empleo) en colaboración con los agentes sociales y empresariales para garantizar el encaje con los perfiles profesionales necesarios en el mercado (programas duales, etc.).
 - Impulsar sistemas de aprendizaje “ad-hoc” (similares a Dinamarca, Finlandia, Austria, e incluso Alemania), que posibiliten pasar el menor tiempo posible en el paro e incorporarse a un nuevo empleo, tanto a las personas desempleadas de larga duración como a aquellas personas afectadas por fenómenos como la automatización, robotización y digitalización.
 - Adecuar las capacidades de las personas (y de las empresas) a las necesidades derivadas de las grandes transiciones.
 - Adaptar la oferta laboral para facilitar el aprovechamiento de todo el potencial de las capacidades de las personas.

Euskadi innovadora

SENTIDO DE LA DIMENSIÓN

La **vía fundamental** para la mejora de la competitividad y el bienestar a medio y largo plazo no va a ser competir en costes sino tener mayores niveles de **productividad**, que viene especialmente determinada por la capacidad de innovación.

La **innovación**, para acabar aportando valor, debe **responder a necesidades de la sociedad y del sistema productivo**, por lo que es muy importante trabajarla **incorporando la perspectiva de demanda** (teniendo en cuenta a los usuarios para los que la innovación aporta un valor) y de forma que **contribuya positivamente a la competitividad al servicio del bienestar** de Euskadi. Asimismo, para ser competitivos a medio y largo plazo, será imprescindible seguir generando nuevas capacidades científico-tecnológicas.

La **innovación** debe entenderse en un **sentido amplio y sistémico**. Esto es, debe desarrollarse en todas sus formas y mecanismos (innovación de producto, innovación de proceso, innovación organizativa, innovación social, innovación de marketing...) y por todos los agentes (empresas, administración pública, universidades y centros de investigación y sociedad civil) en colaboración.

RETOS PARA UNA EUSKADI INNOVADORA

- Impulsar una cultura de la innovación como palanca clave para la diversificación productiva y el aumento de productividad, entendiendo el desarrollo como **continua transformación**:
 - Redireccionando actividades y sectores hacia áreas con mayor valor añadido (industria y servicios avanzados ligados a la industria, servitización, desarrollo de actividades intensivas en conocimiento...).
 - Preservando la generación de riqueza y bienestar en ámbitos complementarios al estrictamente de mercado: la familia, lo comunitario y el sector público
 - Apoyando la transformación digital y otras tecnologías clave (como la inteligencia artificial, *big data*, *blockchain*, nuevos materiales, cuántica...), como elementos transversales, para la aportación de valor al conjunto de la economía (en todos los sectores) y sociedad (atajando brecha digital).
- Impulsar **la generación de capacidades científico y tecnológicas y su aportación de valor añadido, apalancándonos en las capacidades existentes en la RVCTI** y alineándolas con los retos de competitividad al servicio del bienestar de Euskadi presentes y futuros.
- Desarrollar la **innovación** desde una **perspectiva integral, incorporando la demanda como elemento clave**.
 - Combinar la innovación de producto, proceso, social, organizativa, etc.
 - Aumentar el porcentaje de pymes innovadoras (tanto en producto como proceso) y potenciar el efecto *spillover* de las empresas tractoras a las pymes.

- Fomentar la capacidad estratégica de las empresas, en particular, de las pymes.
- Reforzar la perspectiva de las personas usuarias y la sociedad civil en la innovación.
- Innovar en modelos de financiación: encontrar maneras no tradicionales (bancarias o no bancarias) para financiar los activos intangibles y la transformación disruptiva necesarios para el futuro.
- Innovar **el sector público y adaptarlo a los retos del futuro.**
 - Administración que apoye el funcionamiento operativo de las empresas, eliminando burocracia innecesaria, mejorando la accesibilidad y cercanía con la ciudadanía, y agilizando la toma de decisiones.
 - Incorporar nuevo talento a la administración.
 - Repensar criterios de compra pública (innovadora y no innovadora) sostenible, priorizando productos/servicios locales.
 - Innovación tanto en el diseño, como en la implantación, evaluación y gobernanza de mejores servicios públicos que se adapten a las necesidades de las personas.

Euskadi verde

SENTIDO DE LA DIMENSIÓN

Un gran reto global es conseguir que Euskadi sea neutra en carbono en 2050, lo que implica la necesidad de una **transformación cultural profunda** tanto en el ámbito de la producción como en el consumo.

Este reto supone que tenemos que abordar la descarbonización efectiva de Euskadi **de forma económica y ordenada**, sin dañar las bases de competitividad de la economía. Para ello, se plantea avanzar en el sistema de transformación energética y con un enfoque especial en sectores como el transporte, la industria o la edificación, y desarrollar nuevas actividades económicas en ámbitos como la economía circular, la bioeconomía o la alimentación sostenible, entre otros.

Este proceso deberá **poner en valor la sostenibilidad medioambiental como fuente de competitividad para las empresas y para el territorio en su conjunto**, a través de la innovación en productos, servicios, propuestas de valor y procesos de producción y relación entre las empresas, y de estas con sus clientes.

Es necesario atender e incentivar las preferencias de la demanda hacia modelos de **consumo más sostenibles**, lo que requerirá cambios culturales profundos en todos los ámbitos vitales (alimentación, movilidad, generación y gestión de residuos, uso de energía, etc.).

Este proceso de transición requiere situar la **prevalencia del bien común sobre los intereses individuales**.

RETOS PARA UNA EUSKADI VERDE

- **Impulsar de manera efectiva y ordenada el proceso de descarbonización** de sectores como la industria, el transporte o el residencial. Esto implica transformar la industria para que tenga una nula huella medioambiental, mientras sigue siendo competitiva.
 - Avanzar hacia el modelo de *mix* energético de futuro al que se aspira, dentro de los márgenes de actuación europeos.
 - Priorizar estratégicamente las apuestas tecnológicas para descarbonizar la economía en los distintos sectores y las infraestructuras que deben desarrollarse.
 - Definir mecanismos de compensación para mitigar el impacto de la descarbonización en los sectores económicos más afectados y segmentos de la población más vulnerables.
 - Garantizar una transición ordenada y establecer vías para la gestión de conflictos e intereses contrapuestos.
 - Impulsar las energías renovables y las redes inteligentes de energía.
 - Seguir desarrollando mecanismos e instrumentos como la fiscalidad verde para acelerar la transición.
 - Generar actividades de valor añadido en torno a la economía circular, la economía azul y la bioeconomía.
 - Generar mayor valor económico y conocimiento ligados a la gestión medioambiental, la recuperación de ecosistemas y mantenimiento de la biodiversidad.
 - Seguir avanzando en la recuperación de suelos industriales y rehabilitarlos para su uso.
 - Incluir la perspectiva del análisis del ciclo de vida y de proceso para la toma de decisiones, midiendo la huella medioambiental de cada una de las actividades en todas las cadenas de valor y sectores y en los procesos de consumo.
- Redireccionar **la demanda** hacia patrones de consumo más sostenibles (consumo local, reducción de residuos, movilidad sostenible, etc.).
 - Concienciar sobre la transición ecológica como inversión para la mejora de la calidad de vida: formación, medioambiente, salud, medioambiente, etc.
 - Ir desarrollando estrategias que generen mayor certidumbre en las decisiones de compra de las personas usuarias.

Euskadi inclusiva

SENTIDO DE LA DIMENSIÓN

El modelo de desarrollo de Euskadi se ha caracterizado hasta ahora por **conjugar la competitividad económica y la cohesión social**. Este modelo vasco ha permitido situarnos en el primer cuartil de las regiones europeas en desarrollo económico e inclusión. Pero las tendencias demográficas pueden poner en riesgo la sostenibilidad económica del modelo. Es preciso asumir y anticipar los cambios que permitan asegurar el bienestar de todas las

personas y asumir las inversiones estratégicas para la competitividad y el bienestar futuro con un **enfoque preventivo**.

Los grandes retos y transiciones que deberá afrontar Euskadi pueden conducir a una **acentuación de la desigualdad**, especialmente en aquellos colectivos que se vean más negativamente afectados por las transiciones y la automatización.

Estas desigualdades pueden ser de carácter vertical (entre los que más y menos tienen) como de carácter horizontal (entre diferentes grupos, según su género, nivel de formación, edad, nacionalidad...). Por tanto, resulta necesario poner en marcha **estrategias y políticas** que, previendo esto, **permitan garantizar el empoderamiento, la inclusión y cohesión de todas las personas** que vivan en Euskadi, por las ventajas que, tanto desde el punto de vista ético como de la propia eficiencia, presenta un modelo de desarrollo inclusivo. En este sentido, la inclusión de las personas inmigrantes va a ser fundamental, por su contribución al bienestar de Euskadi en su conjunto.

En esta línea resulta esencial **innovar en los modelos de gestión** (combinación de gestión pública, privada, cooperativa, comunitaria etc..) **para garantizar los servicios públicos fundamentales de calidad a todas las personas** (sistema educativo, social y sanitario) y hacer que los mismos sean sostenibles a medio y largo plazo. Además, es necesario buscar un **equilibrio entre la economía productiva y la economía de los cuidados**, con un mayor reconocimiento de esta última y con una división más equitativa de cargas.

RETOS PARA UNA EUSKADI INCLUSIVA

- Ofrecer unas prestaciones y **servicios públicos de calidad** asociados al bienestar (en especial, sistema educativo, de servicios sociales, sanitario, de vivienda, empleo y garantía de ingresos) que **empoderen** y garanticen la igualdad de oportunidades y resultados para todas las personas, buscando un **equilibrio** en la sostenibilidad económica del sistema vasco de protección social.
 - Adoptar un enfoque preventivo y de inversión (reducción del gasto futuro) en el sistema sanitario, de servicios sociales y garantía de ingresos.
 - Generación de entornos físicos y virtuales seguros para vivir (independientemente del género, barrio, lugar, nacionalidad, orientación sexual).
 - Mejorar el engranaje y cooperación entre sistemas (espacio socioeducativo, laboral-sanitario, ...).
 - Eliminar potenciales excesivas barreras de acceso (por ejemplo, burocráticas).
- Reducir las **desigualdades** en nivel de bienestar existentes en la sociedad y las divisiones que pueden generar las **grandes transiciones** (apoyando en particular a los perdedores de estas transiciones).
 - Abordar desigualdades a nivel *vertical* (distribución dispar de la riqueza) y *horizontal* (entre diferentes colectivos, por género, edad, origen, discapacidad, etc.), incorporando la perspectiva interseccional en las políticas públicas.

- Atender de forma holística las necesidades de inclusión y de acogida (educativas, sanitarias, de carácter social, etc.) de colectivos inmigrantes (incluyendo 2das y 3ras generaciones), que serán claves para la consecución de un modelo competitivo y socialmente equilibrado respondiendo a la transición demográfica.
 - Potenciar la cohesión territorial, equilibrio rural-urbano y reactivar las Zonas de Actuación Preferente (ZAP).
 - Fomentar la inclusión efectiva de colectivos vulnerables a través del empleo de calidad (importancia de mantener clase media) y/o otros modos de participación en la sociedad.
 - Apoyar el acceso a una vivienda digna a precio asequible, particularmente para los que, quedando fuera de los límites de la vivienda pública, no pueden acceder al mercado libre. Además, poner en marcha mecanismos para evitar fenómenos como la “guetización” de la población inmigrante.
- Afrontar el **reto demográfico, envejecimiento de la población** y las crecientes tasas de dependencia:
 - Adecuar el ecosistema de cuidados (tanto titularidad como gestión) atendiendo también problemas de soledad para garantizar bienestar de toda la ciudadanía.
 - Impulsar medidas de conciliación que permitan a las personas desarrollar su vida personal, familiar y laboral, y a las familias que opten por hacerlo, ejercer un papel en los cuidados.
 - Desarrollar la perspectiva intergeneracional, y la cohesión entre generaciones, buscando un mejor equilibrio de la riqueza entre generaciones.
 - Reducir la edad media y aumentar las tasas de emancipación de la juventud.

Euskadi comprometida

SENTIDO DE LA DIMENSIÓN

El modelo de desarrollo de Euskadi se ha caracterizado por ser una sociedad **participativa y comprometida**, en la que subyace una filosofía de **colaboración** entre actores privados, público-privados o público-públicos. Un modelo de colaboración, trabajo y esfuerzo conjuntos en pos del bien común.

Sin embargo, el alto grado de desarrollo y bienestar alcanzado en Euskadi pueden conducir a **caer en la comodidad** y, para su sostenibilidad, va a ser muy importante que todas las personas **nos impliquemos con actitud emprendedora, proactiva y corresponsable** en la construcción del futuro de Euskadi, aportando valor desde todo nuestro potencial y capacidades.

Una Euskadi **comprometida**, supone trabajo en colaboración entre todas las personas, en el proyecto común de construir el futuro que deseamos para Euskadi; y, también supone una Euskadi **arraigada**, que significa la generación de una comunidad, en un país, con una **identidad y lengua propias y valores diferenciales**, con una cultura singular dinámica y abierta al mundo; acogedora de otras culturas y visiones. Un País con el reto de avanzar en un

proceso permanente de **“construcción comunitaria dinámica”**. Un País con raíces, que construye sobre su pasado, implicado con el presente y comprometido con su futuro.

La construcción de una Euskadi comprometida implica también, desde el ámbito público, la creación de nuevos modelos de **gobernanza colaborativa** eficientemente conectados con un **modelo de gobernanza multinivel**. En el ámbito empresarial, una transición cultural hacia modelos de **relación trabajador/a-empresario/a constructivos** y de generación de proyectos compartidos.

RETOS PARA UNA EUSKADI COMPROMETIDA

- Mantener y fomentar una **identidad singular y dinámica** de Euskadi que genere un sentimiento de comunidad, que contemple valores sociales y cultura propias, y esté abierta a un mundo crecientemente interconectado y globalizado.
 - Continuar fomentando el aprendizaje y uso del euskera.
 - Salvaguardar el patrimonio cultural vasco y garantizar su acceso y disfrute por parte de la sociedad
- **Impulsar los valores sociales para fortalecer el modelo de competitividad al servicio del bienestar inclusivo y sostenible.**
 - Fomentar la proactividad y compromiso individual y colectivo de las nuevas generaciones, para mantener y prosperar en bienestar, trabajando también la puesta en valor de estos valores en los medios de comunicación e impulsándolos en las familias y en el sistema educativo.
 - Puesta en valor del trabajo y del esfuerzo como base del bienestar individual y compromiso con el bienestar colectivo.
 - Reforzar el reconocimiento del emprendimiento, la vocación empresarial, ambición de crecimiento y la mentalidad crítica, abierta y creativa.
 - Reforzar en la educación una dimensión ética, para formar a personas íntegras que, particularmente en entornos de inteligencia artificial, big data, etc., puedan discernir decisiones válidas desde una perspectiva de derechos humanos, priorizando valores democráticos y colectivos.
- Generar espacios para la **gobernanza colaborativa y multinivel:**
 - Profundizar en la colaboración público-pública, aumentando voluntad de cooperación en competencias compartidas, para mejorar la eficiencia institucional y vocación de país.
 - Impulsar la colaboración público-privada y comunitaria para abordar los retos estratégicos de futuro en Euskadi.
 - Reforzar la imagen de la administración pública como aliada para el impulso de la competitividad para el bienestar y no como mera proveedora de servicios.
- Potenciar el **compromiso de las empresas, organizaciones e instituciones** para el impulso de la competitividad al servicio del bienestar inclusivo y sostenible: una economía humanista y social “con cara y ojos”.

- Impulsar un cambio de cultura en las relaciones trabajador/a empresario/a hacia el entendimiento de los proyectos empresariales como proyectos compartidos, generando mecanismos que faciliten la inclusión y participación de las y los trabajadores en los distintos procesos de la empresa (incluyendo el estratégico), tanto en periodos de crisis como en épocas de crecimiento.
- Favorecer el desarrollo de grupos empresariales vascos tractores y relevantes a nivel internacional, y el mantenimiento de los centros de decisión que ayuden en el impulso de la competitividad para el bienestar de Euskadi.

Euskadi conectada

SENTIDO DE LA DIMENSIÓN

Euskadi ha venido realizando **serios esfuerzos de internacionalización** en distintos ámbitos: bienes y servicios, capitales, conocimiento y personas. Con ello, se ha logrado una alta presencia empresarial en el exterior, además de un mayor reconocimiento internacional del Territorio.

Resulta imprescindible seguir desarrollando la **conexión internacional de Euskadi, particularmente en relación con las palancas de competitividad** relativas al conocimiento, la financiación y capital humano o talento. Los procesos de internacionalización habrán de realizarse con conciencia global, siendo **coherentes con parámetros medioambientales y de justicia social**.

El objetivo es lograr **que el modelo de desarrollo económico-medioambiental-social de Euskadi sea una referencia en el escenario internacional y mejoremos la misma aprendiendo de otros**, haciendo que nuestro modelo sea conocido en el mundo y que otras regiones puedan aprender del mismo (por ser un modelo de competitividad al servicio del bienestar inclusivo y sostenible) y nosotros aprendamos de otras referencias internacionales.

RETOS PARA UNA EUSKADI CONECTADA

- Impulsar el **posicionamiento y rol activo de Euskadi en Europa y su conexión con nodos y redes de vanguardia** en países prioritarios en los temas ligados a la competitividad y bienestar de las regiones y como aliado en la construcción europea (no sólo en lo económico sino en la construcción de cultura, valores y derechos humanos).
- Convertir a Euskadi en un **referente** como actor activo, emprendedor y solidario en la escena internacional, a través de la exportación de sus modelos de desarrollo que han resultado exitosos (clústeres, formación profesional, etc.). Para ello, será fundamental el mejor aprovechamiento de las redes e iconos existentes, el fomento de alianzas estratégicas y la generación de un relato compartido. Asimismo, **aprender de otras experiencias internacionales** de referencia en cada ámbito para la mejora continua de nuestro propio modelo.

- Seguir impulsando la **internacionalización de todos los actores** del territorio:
 - De la empresa vasca: reforzando su posición en países emergentes y con gran potencial de crecimiento y aplicando estrategias de creación de valor compartido coherentes con el modelo vasco de competitividad.
 - De todos los actores del sistema de I+D+i (universidades, CCTT, CICs, BERCs, institutos de investigación en salud, etc.).
- Desarrollar una estrategia con la **diáspora (tanto la clásica como la más reciente que incluye estudiantes y personas que están trabajando fuera) y con la red exterior del Gobierno Vasco** para abordar los retos de Euskadi, como por ejemplo el reto de la transición demográfica colaborando en la atracción de talento.
- Desarrollar las **infraestructuras físicas clave** que ayuden en la conexión dentro y fuera de Euskadi, tanto las infraestructuras de movilidad como las energéticas y las digitales (5G, *internet of things*, conectividad, etc.).

Appendix VI Panel of indicators (Spanish)

Visión	Indicador	Último dato	Fuente	Notas
PROSPERA	PIB per cápita (PPAs)	32.782	Eustat-CCEE. Cuentas Económicas	Términos corrientes
	Tasa de desempleo (% pobl. Activ.)	9,1	Eustat-PRA. Encuesta de Población en Relación con la Actividad	Porcentaje de personas de 16 o más años que están en condiciones y con la intención de trabajar y que no tienen trabajo (población desempleada) sobre el total de la población activa (población ocupada + población desempleada), según la Encuesta de Población en Relación con la Actividad del Eustat.
	Tasa de temporalidad en el empleo (contratados temporales / total asalariados)	23,8	INE-EPA. Encuesta de Población Activa	Porcentaje de empleos temporales (relación laboral por tiempo determinado - sea ésta a jornada completa o parcial -) sobre el número total de asalariados (15-64 años). Medias anuales de los cuatro trimestres del año.
	Productividad aparente por trabajador (kPPA-€)	69,6	Eustat-CCEE. Cuentas Económicas	
	Porcentaje de población entre 25 y 34 años que ha completado estudios terciarios	66	INE-EPA. Encuesta de Población Activa	Porcentaje de población entre 25 y 34 años con estudios terciarios de carácter universitario y/o e FP de grado superior sobre el total de población de ese mismo rango de edad.
	Deuda pública de la Administración General de Euskadi (% PIB)	13,7	GV. Departamento de Economía y Hacienda y Eustat para datos del PIB	Deuda de la Administración General de la CAE (también conocida como Deuda viva de la CAE) (Gobierno vasco+Organismos autónomos+Sociedades públicas)
INNOVADORA	Pymes que son innovadoras (%)	38,8	Eustat. Encuesta de Innovación	Estrato de empleo: de 10 a 249
	Ventas de productos nuevos o mejorados en Pymes (% ventas)	13,2	Eustat. Encuesta de Innovación	Estrato de empleo: de 10 a 249

	Regional Innovation Scoreboard (RIS)	103,6	Comisión Europea	Indicador sintético que evalúa el rendimiento de la innovación de las regiones europeas en un número limitado de indicadores. (%) Con respecto a UE27=100
	Gasto total en I+D (% s/PIB)	2,1	Eustat-I+D	En la Estadística sobre Actividades de Investigación Científica y Desarrollo Tecnológico se computan los recursos (humanos y materiales) utilizados en este tipo de actividades por parte de las empresas, universidades y otros centros dependientes de organismos públicos que realicen actividades de I+D.
	Publicaciones científicas entre el 10% de las más citadas internacionalmente (%)	11,17	Eustat. Panel de indicadores europeos de innovación	El factor de impacto o índice de impacto mide la frecuencia con la que una revista ha sido citada en un año concreto. Está basado en el número de veces que se cita por término medio un artículo publicado en una determinada revista.
VERDE	Índice de emisiones de gases efecto invernadero (Año base 2005)	64,5	GV. Medio Ambiente	Índice de emisiones difusas de Gases de Efecto Invernadero. Año base 2005=100%.
	Tasa de reciclaje de residuos urbanos (%)	44,7	Eustat. Indicadores de la Agenda 2030 para el Desarrollo Sostenible	Proporción de residuos municipales reciclados en relación al total de residuos municipales generados y tratados por territorio histórico.
	VAB del sector de bienes y servicios ambientales (% PIB)	1,8	Eustat. Cuentas ambientales. Cuenta de bienes y servicios ambientales	
	Intensidad energética final [consumo energía (toe)/PIB (M€)]	65	EVE. Ente Vasco de la Energía	Se calcula como la relación entre el consumo energético final y el producto interior bruto (PIB) de un país, medido en tep/M€, siendo tep tonelada equivalente de petróleo (energía que rinde una tonelada de petróleo). Un dato a la baja supone más eficiencia energética.
	Cuota de energías renovables en el consumo final bruto de energía (%)	16,9	EVE. Ente Vasco de la Energía	Cuota del consumo energético total procedente de fuentes renovables (incluida la energía eléctrica de origen renovable importada), en relación con el total de consumo de energía. Consumo final energético, medido en miles de toneladas equivalentes de petróleo (ktep).
INCL	Esperanza de vida	83,2	INE. Indicadores de mortalidad	

	Tasas de abandono escolar	4,8	GV. Mº Educación y Formación Profesional	Porcentaje de personas de 18 a 24 años que no ha completado la educación secundaria de segunda etapa (Bachiller o FP grado medio) y no sigue ningún tipo de estudio-formación. Se diferencia del fracaso escolar que es el experimentado por aquellos alumnos que no obtienen una titulación que acredite haber finalizado satisfactoriamente la educación secundaria obligatoria (ESO).
	Tasa de riesgo de pobreza y exclusión Arope	15,9	INE-ECV. Encuesta de Condiciones de Vida	Se consideran personas que viven en riesgo de pobreza y/o exclusión social a la población que se encuentra en alguna de estas tres situaciones: personas que viven con bajos ingresos, personas que sufren privación material severa y/o personas que viven en hogares con una intensidad de empleo muy baja. Este indicador sintetiza los resultados obtenidos de la medición de estas tres situaciones. En la encuesta de Condiciones de Vida, los ingresos que se utilizan en el cálculo de variables como rentas y tasa de riesgo de pobreza corresponden siempre al año anterior. A nivel subregional utilizamos los microdatos de la EPDS (Encuesta de Pobreza y desigualdades Sociales). En el proceso de elaboración del Indicador Eurostat/INE se basa en la Renta mediana de España mientras que Eustat utiliza la Renta mediana de Euskadi. Es por ello, que tomamos los datos del INE/Eurostat, ya que el objetivo es compararlo con los datos de otras regiones europeas, que a su vez utilizan la mediana del total nacional.
	Índice de Gini	28,2	Eustat. Estadística de renta personal y familiar	El valor de 0 expresa la igualdad total y el valor 100 la máxima desigualdad. 0 es reparto equitativo y 100 una persona lo acapara todo. A menor índice mayor igualdad.
	Índice de igualdad de género (IIG)	73,1	Eustat. Índice de igualdad de género y EIGE (Instituto Europeo de la Igualdad de Género)	El Índice de Igualdad de Género (escala de 1 a 100) es un indicador sintético que resume las desigualdades que todavía existen entre hombres y mujeres en una serie de aspectos relevantes que afectan a su bienestar y a su desarrollo personal. Se elabora empleando la metodología del Instituto Europeo para la Igualdad de Género (EIGE), así como la información facilitada por dicha institución sobre el conjunto de los 27 países que actualmente forman parte de la Unión Europea. La aplicación de esta metodología permite, por tanto, comparar los avances en igualdad de género en la C.A. de Euskadi con la referencia que ofrecen los países de la Unión Europea. En su composición figuran 31 indicadores, estructurados de forma jerárquica en seis

				dimensiones, que se dividen a su vez en 14 subdimensiones.
	Tasa de natalidad por mil habitantes	6,7	INE. Indicadores de natalidad	Cociente entre el número de nacimientos en unidades y la población total en miles.
	Inversión sanidad pública por habitante (€)	2.028	GV. Ministerio de Sanidad, Consumo y Bienestar Social	Montante económico en Euros por habitante de los Presupuestos anuales aprobados para el Departamento de Salud.
	Inversión educación por alumno/a (€)	9.868	GV. Ministerio de Educación y Formación Profesional	Gasto público por alumno/a en la enseñanza no universitaria. Excluida la formación ocupacional. El alumnado se ha transformado en equivalente a tiempo completo, de acuerdo con metodología utilizada en la estadística internacional. Gasto público por alumno público.
	Gasto en protección social per cápita (€ PPC)	9.464	Eustat. Cuenta de la protección social	Gasto en protección social en Euros por habitante (PPC Paridad de Poder de Compra): Atención sanitaria, Invalidez, Vejez, Supervivencia, Familia/Hijos, Desempleo, Vivienda y Exclusión Social. A efectos de comparación estadística se utiliza el concepto europeo homologado de gasto en protección social, incluye: enfermedad, atención sanitaria, Invalidez, vejez, supervivencia, Familia/Hijos, desempleo, vivienda y exclusión social. (No incluye educación). Incluye el gasto realizado por todas las Administraciones en Euskadi (Autonómica, foral, local y estatal –seguridad social, muface, ..) y también el gasto privado. (mutuas. EPSVs, entidades de seguro libre).
	Tasa media de emancipación juvenil	35,1	GV. Observatorio Vasco de la Juventud	Porcentaje de población de 18 a 34 años que vive fuera del hogar de origen respecto de total de jóvenes de ese grupo de edad.
COMPROMETIDA	Confianza en las instituciones públicas	4,5	Eustat-EBP. Encuesta de Bienestar Personal	Este indicador está obtenido por media de las siguientes preguntas: 1. En una escala de 0 a 10, en la que 0 significa que no confía usted nada y 10 que confía totalmente, ¿cuánto confía personalmente en el Sistema político (Gobierno, Partidos Políticos, Sindicatos, ...)? 2. En una escala de 0 a 10, en la que 0 significa que no confía usted nada y 10 que confía totalmente, ¿cuánto confía personalmente en el Sistema judicial (Juzgados, Jueces, Abogados, ...)? 3. En una escala de 0 a 10, en la que 0 significa que no confía usted nada y 10 que confía totalmente, ¿cuánto confía personalmente en la Policía (Policía Nacional, Ertzantza, Guardia Civil, ...)? Se presenta la medida de evaluación agrupada en tres niveles: De 0 a 4 puntos (Bajo), de 5 a 7 puntos (Medio) y de 8 a 10 puntos (Alto).

	Confianza en las personas	6,4	Eustat-EBP. Encuesta de Bienestar Personal	Este indicador está obtenido directamente de la pregunta "En una escala de 0 a 10, en la que 0 significa que, en general, no confía usted nada y 10 que confía totalmente, ¿cuánto diría usted que puede confiar en la mayor parte de las personas?" Se presenta la medida de evaluación agrupada en tres niveles: De 0 a 4 puntos (Bajo), de 5 a 7 puntos (Medio) y de 8 a 10 puntos (Alto).
	Población vascohablante mayor de 5 años	846.337	Eustat. Censo y Estadística de Población y Viviendas	Conocimiento y uso del euskera. Población mayor de 5 años de la CAE que entiende y habla "bien" euskara.
	Tasa de actividad emprendedora total (TEA)	5,2	GEM. Global Entrepreneurship Monitor	Principal indicador elaborado por el proyecto GEM y corresponde a la suma del porcentaje de emprendedores nacientes y el porcentaje de emprendedores nuevos.
	Absentismo laboral	7,9	Randstad Research. A partir de Encuesta de Población Activa (EPA), Encuesta Trimestral de Costes Laborales del Instituto Nacional de Estadística (INE)	La tasa de absentismo incluye las ausencias debidas a todas las causas, justificadas (como bajas médicas) o no. Representa el porcentaje de horas pactadas que no se realizan por culpa de dichas ausencias.
	Importancia del trabajo	62,3	EVS-European Values Study	El European Values Study es un programa de investigación a gran escala, transnacional y longitudinal sobre cómo piensan los europeos sobre la familia, el trabajo, la religión, la política y la sociedad. La encuesta, que se repite cada nueve años en un número cada vez mayor de países, proporciona información sobre las ideas, creencias, preferencias, actitudes, valores y opiniones de los ciudadanos de toda Europa. El ítem concreto en la encuesta es el siguiente: ¿Qué grado de importancia tiene en su vida el trabajo? (1) muy importante, (2) bastante importante, (3) no muy importante, (4) nada importante. El indicador se calcula teniendo en cuenta la opción "muy importante".

	Índice de calidad de los gobiernos	0,97	Comisión Europea	El Índice Europeo de Calidad del Gobierno (EQI) captura las percepciones y experiencias de los ciudadanos promedio con la corrupción, la calidad y la imparcialidad de tres servicios públicos esenciales (salud, educación y policía) en su región de residencia. La edición de 2021 arroja luz sobre los principales patrones y tendencias de la última década y añade un análisis cualitativo en profundidad sobre la situación de cuatro regiones: el País Vasco y Cataluña en España y Lubelskie y Opolskie en Polonia. La media de la UE es 0; los valores negativos están por debajo de la media de la UE; los valores positivos están por encima de la media de la UE.
CONECTADA	Balanza comercial (% PIB)	7,1	Eustat-ECOMEX. Estadística de Comercio Exterior	Saldo anual entre exportaciones e importaciones como porcentaje del PIB.
	Empresas exportadoras regulares (% s/ total empresas que son sociedades)	12,1	ICEX España Exportación e Inversiones	Denominador: Sociedades anónimas, Sociedades de responsabilidad limitada, Sociedades colectivas, Sociedades comanditarias, Sociedades cooperativas
	Empresas con filiales extranjeras (%)	6,7	SABI. Sistema de Análisis de Balances Ibéricos	
	Número total de proyectos del Programa H2020	235		Total proyectos en el periodo 2014-2020 del Programa H2020 = 1.253
GLOBAL	Satisfacción con la vida	7,7	ESS- Encuesta Social Europea	
	Índice de Desarrollo Humano	0,937	Eustat. Índice de desarrollo humano	El Índice de Desarrollo Humano (IDH) es un indicador sintético de los logros medios obtenidos en las dimensiones fundamentales del desarrollo humano: tener una vida larga y saludable, adquirir conocimientos y disfrutar de un nivel de vida digno. El IDH es la media geométrica de los índices normalizados de cada una de las tres dimensiones. Se elabora para la C.A. de Euskadi siguiendo la metodología del Programa de las Naciones Unidas para el Desarrollo (PNUD). Criterios de Clasificación: Desarrollo Humano muy alto: 0,800 y más. Media mundial para 2019: 0,898. Desarrollo Humano alto: 0,700 a 0,799. Media mundial para 2019: 0,753. Desarrollo Humano medio: 0,550 a 0,699, Media

				mundial para 2019: 0,631. Desarrollo Humano bajo: menos de 0,550. Media mundial para 2019: 0,513.
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Appendix VII Letter of informed consent

CONSENTIMIENTO INFORMADO

D./Dña....., mayor de edad, manifiesto que se me ha informado debidamente sobre el tipo de participación que se me solicita, para la tesis doctoral desarrollada por Ane Izulain titulada de manera provisional “La influencia de los valores sociales en el desarrollo de visiones de futuro sobre competitividad al servicio del bienestar. El caso del País Vasco”, realizado para el *programa doctoral Derechos Humanos: Retos éticos, sociales y políticos* de la *Universidad de Deusto*, y que:

1. *He recibido suficiente información sobre el estudio.*
2. *He podido hacer todas las preguntas que he creído conveniente sobre el estudio y se me han respondido satisfactoriamente.*
3. *Comprendo que mi participación es voluntaria.*
4. *Comprendo que puedo retirarme del estudio y revocar este consentimiento:*
 - a. *Cuando quiera*
 - b. *Sin tener que dar explicaciones y sin que tenga ninguna consecuencia de ningún tipo.*

También se me ha explicado que la información obtenida se empleará únicamente con el fin de la investigación citada y que mis datos personales serán protegidos, tratados confidencialmente y nunca serán transmitidos a terceras personas o instituciones.

Tomando todo ello en consideración, OTORGO mi CONSENTIMIENTO a participar en este estudio, para cubrir los objetivos especificados.

Firma de la persona participante:

Firma de la(s) persona(s) investigadora(s):

Nombre y fecha:

Nombre y fecha: