



JIHOMORAVSKÝ REGION



In a geographically suitable place, in the southeastern part of the Czech Republic lies the *Jihomoravský* Region in the territory of which roads have crossed to connect different parts of Europe from time immemorial. The Region is proud to have a number of sights and monuments of nature of which some are on the UNESCO List of World Cultural Heritage. Within the EU it neighbours with Slovakia and Austria and within the Czech Republic on the *Pardubický*, *Jihočeský*, *Olomoucký*, *Zlínský*, and *Vysočina* Regions. In comparison with the other regions, it has borders with the largest number of neighbours (7); it cooperates with them in the areas of communication; landscape maintenance and planning; hydrology; ecology; urbanisation; provision of services and cultural, administrative and educational links; concerted action towards national and supranational (European) authorities, international cross-border cooperation, etc.

With its 7 065 km² of area it is the fourth largest region of the CR, covering 9% of the country's area.



The fourth largest is also its percentage of agricultural land (60.3%). The Region's percentage of arable land (50%) is the largest in the CR's regions. The woodland covers 28% – least after Prague.

The *Jihomoravský* Region is composed of the districts of *Blansko*, *Brno-město*, *Brno-venkov*, *Břeclav*, *Hodonín*, *Vyškov*, and *Znojmo*. There are 647 municipalities in the Region, the third highest number next to the *Středočeský* and *Vysočina* Regions. The average area of the municipality cadastre, 11 km², is the tenth largest; the average population of 1 735 is the seventh highest and is slightly (6%) above the national average. There are 7% of population living in municipalities up to 500 inhabitants; this percentage has a slightly falling trend and is now 0.5% below the average of the CR. The percentage of the population living in municipali-

ties with 501 to 2 000 in inhabitants slightly rises and stands at 21.4% now (4% above the national average). A total of 23% of population live in municipalities with 2 001 to 10 000 inhabitants and the percentage steadily rises. The proportion of the population living in towns with more than 10 000 inhabitants (49%) decreases and is 6% below the CR' average now. The population living in the Region's capital of *Brno* account for 33%, which is the highest percentage among all the regional towns of the country except for the capital city of Prague. The percentage is that high, because the town of *Brno* developed historically *inter alia* as a centre of a much larger territory with a rather large population (provincial capital). *Břežina* (7 inhabitants) in the district of *Vyškov* is the smallest municipality of the Region, and also of the CR (actually it is not a classic muni-

Selection of topical indicators

Number of inhabitants (31.12.2004)		1,123,201	Average monthly gross wage (2004) ⁴		16,230
incl.	Foreigners with long-term stay ¹	15,566	Unemployment rate based on LFS (%; 2004)		8.3
	Foreigners with permanent residence	8,335	Employment in sectors (%; 2004)	Primary	5.1
Number of municipalities / towns (31.12.2004)		647 / 47		Secondary	38.5
Population living in the regional capital (%)		32.7		Tertiary	56.4
Live-born children outside marriage (%; 2004)		25.0	Completed dwellings, total (2004)		3,842
Population with university education ² (2004)	males	15.2	incl. Dwellings in family houses (%)		40.2
	females	10.1	Guests in accommodation establishments, total (2004)		1,014,514
Economically active population (2004)		555,369	incl. Foreign nationals (%)		34.1
incl. Employers or own-account workers (%)		16.5	GDP per capita (Purchasing power parity, 2003)		15,209
			Gross fixed capital formation per capita (in CZK, 2003)		52,718
Economic activity rate (2004) ³	males	67.6	Net disposable income of households per capita (CZK, 2003)		125,033
	females	49.2			

¹ Foreigners with visas over 90 days

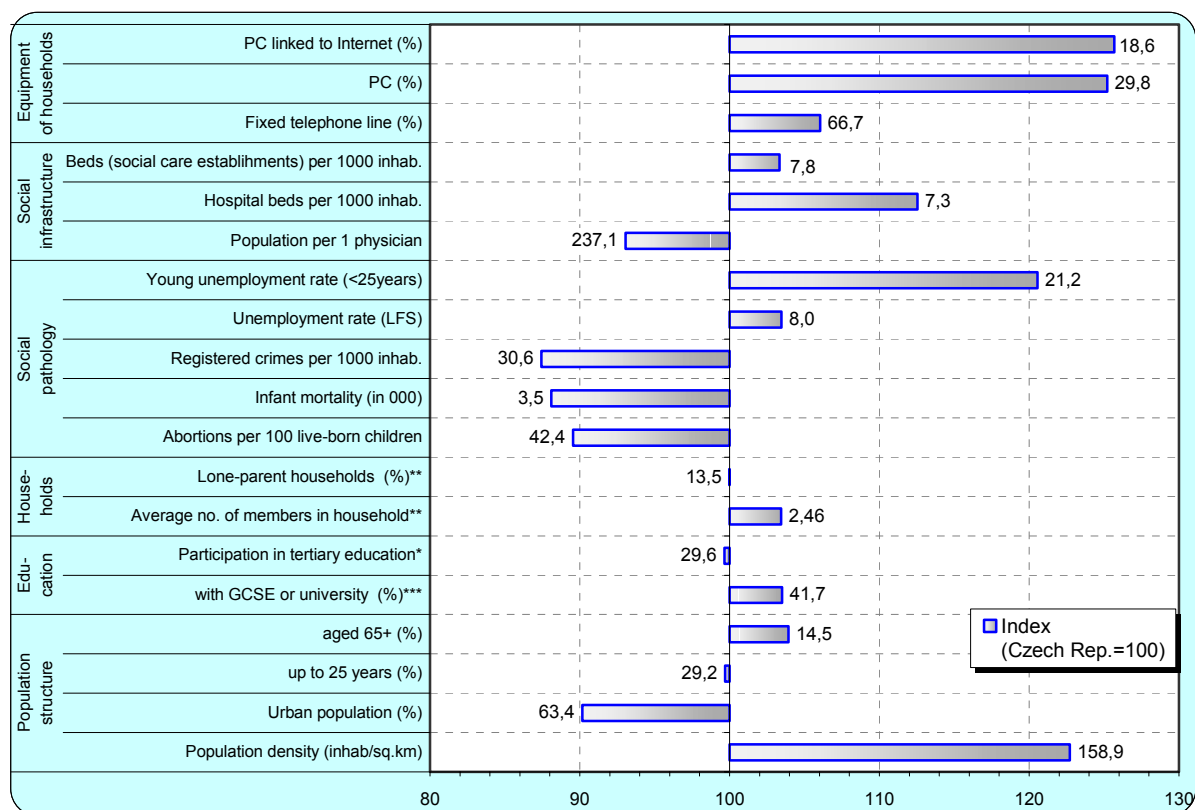
² Related to population aged 15+

³ Share (%) of economically active persons from total population aged 15+

⁴ in CZK, per employee in national economy (excluding armed forces), enterprise method (i.e. by head office of enterprise)



Demography and social life - region compared with the Czech Republic



Note. Figures in graph (beside bars) express value of indicator (in region), x-axis relation of this value to national level.

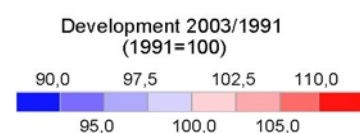
* Share (%) of students aged 20-24 in total population aged 20-24

** From Population census 2001 (all indicators in graph refer to 2003, except for abortions and infant mortality which refer to 2001-2003)

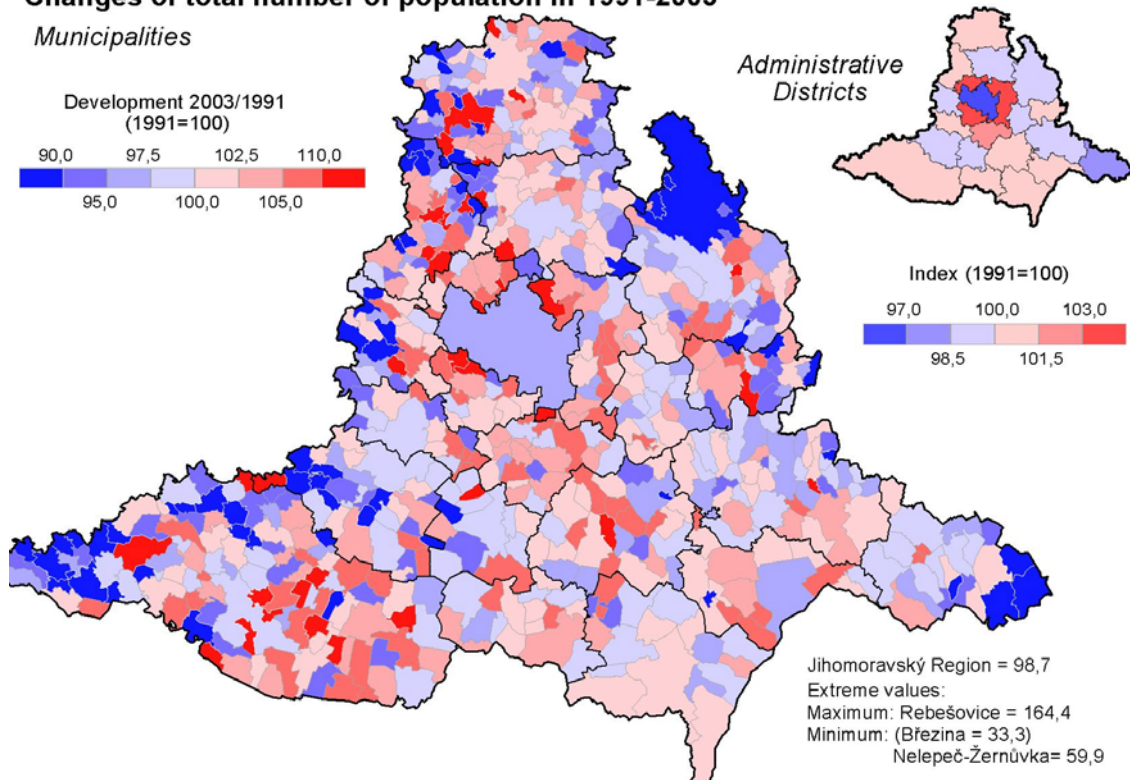
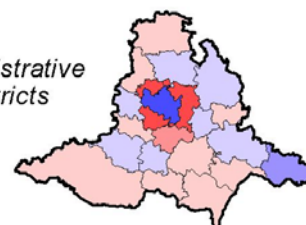
*** related to total population aged 15+

Changes of total number of population in 1991-2003

Municipalities



Administrative Districts





Population and vital statistics: 1993/2003

Population, 31 December 1993	1,141,313
Live births (average for 1994-1998)	10,237
Deaths (average for 1994-1998)	12,485
Net migration (average for 1994-1998)	1,620
Population, 31 December 1998	1,138,174
Live births (average for 1999-2003)	9,763
Deaths (average for 1999-2003)	11,942
Net migration (average for 1999-2003)	578
Population, 31 December 2003	1,122,570

Age distribution of the population: 31 December 2003

Age	Total	Total	Men	Women
	Thous.	%	%	%
0 - 14	168.2	15.0	15.8	14.2
15 - 24	156.0	13.9	14.7	13.2
25 - 39	259.3	23.0	24.3	21.9
40 - 54	235.6	21.0	21.6	20.4
55 - 64	140.9	12.6	12.2	12.9
65 -	162.6	14.5	11.4	17.4
Total	1122.6	100.0	100.0	100.0

city, but a military district; the smallest municipality in the Region is *Lhota u Olešnice* with 36 inhabitants; the lowest population density is in the municipality of *Zálesná Zhoř* – 7.5 inhabitants per km²).

There are 21 administrative territories of municipalities with extended powers in the *Jihomoravský* Region, 80 km² to 1 242 km² in size and 12 thousand to 370 thousand in population.

The Region has a strong tradition of industrial production in its middle and northern areas and a tradition of specialized branches of agriculture—viticulture and fruit growing—in the south. It has diversified industrial production, sufficient building capacities and a good level of services. You can find there well-educated population, available labour force, a number of top health establishments, a high level of

schooling—more than 30 university faculties focused on humanities, economics and technology. The Region has an advantageous position on railway and road networks of the highest categories. The quality of the environment is also above the average, and the quality of services in the area of tourism is steadily increased (accommodation establishments, a dense network of cycle paths). There are places which attract tourists (*Lednice-Valtice* complex, *Podyjí* National Park, *Slavkov* battlefield, *Brno* fairs, *Moravský kras* (the Moravian Karst)) and good conditions for congress tourism in the Region.

Eight years of declining population

Following eight years of population decreases, the *Jihomoravský* Region's population increased in

the year 2003 again. All the same, the population was by 19.4 thousand down on the year 1994. The population development is affected by low birth rate in particular: the number of deaths has been exceeding the number of births every year since 1994. Even the positive net migration, which occurred in all the years except for 2001 and 2002, failed to offset the negative development of natural movement. Similarly to other regions, in this Region too is a very strong migration stream from the town of *Brno* to the district of *Brno-venkov*. The declining number of marriages documents the view of young generation on the institution of marriage. Given that the number of divorces is on a slight increase, the divorce index (number of divorces per 100 marriages) is as high as nearly 60. The situation in birth rate is gradually becoming better, though the resulting figures are small, because strong population cohorts from the 1970s entered the childbearing period. In the year 2003, the birth rate reached 8.9 live births per 1 000 mid-year population. The number of extramarital births steadily increases—almost every child of four is born outside marriage in the Region now. The number of deaths oscillates around 10.5 per 1 000 mid-year population.

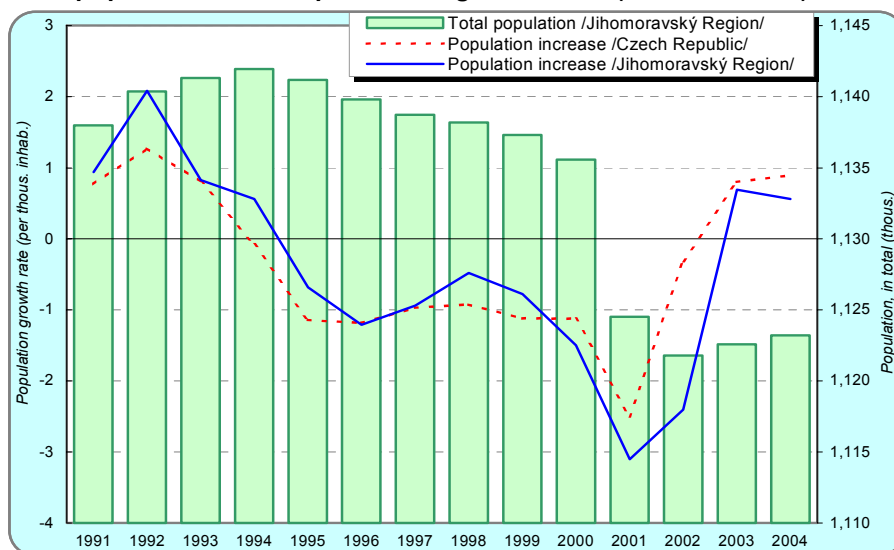
The average age of the population in the year 2003 is 39.8 (women 41.4, men 38.0) and increased by 0.8 years from the year 2000. As for the age distribution of the population, the proportion of the child component is diminishing, while proportions of working-age and post-working-age components are rising. Population aged 0-14, 15-64 and 65+ accounted for 15%, 70.5% and 14.5% in the

Significant employers: by head office of enterprise, 2003

Name	Head Office	Activity	No. of workers
Ahold Czech Republic, a.s.	Brno-sever	Retail trade	> 10 000
Fakultní nemocnice Brno	Brno-Bohunice	Health care	> 4 000
Finanční ředitelství v Brně	Brno-střed	Public transport	> 3 000
Statutární město Brno	Brno-střed	Public administration	> 3 000
Dopravní podnik města Brna, a.s.	Brno-střed	Transport	> 2 500
Fakultní nemocnice U sv. Anny	Brno-střed	Health care	> 2 500
Masarykova univerzita v Brně	Brno-střed	Education	> 2 500
PENAM, s.r.o.	Brno-střed	Manufacture of baker products	> 2 000
Vysoké učení technické	Brno-střed	Education	> 2 000
ŽS Brno, a.s.	Brno-střed	Construction	> 2 000

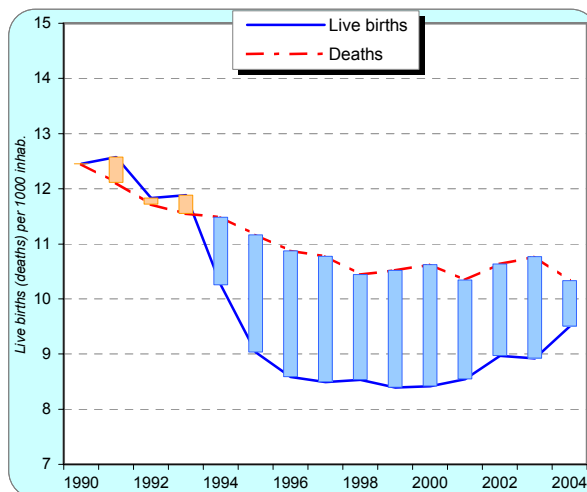


Total population - development in region and CR (31 Decemeber)

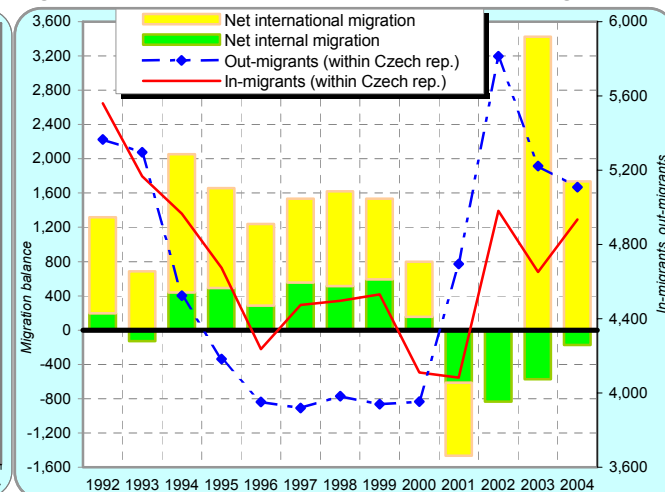


Data since 2001 reflect the Housing and Population Census (1.3.2001) results and also include foreigners who were granted long-term stays (i.e. foreigners with visas over 90 days). Population decrease 2001 was influenced mainly by Census (1.3.2001), which found out lower population than that registered by yearly demographic statistics). Population growth rate was calculated as a difference between 1 January and 31 December (in 2001 population at 1 January was recalculated by Census).

Vital statistics

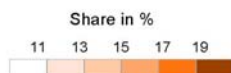


Migration balance - internal and international migration



Share of population aged 65 and more (Census 2001)

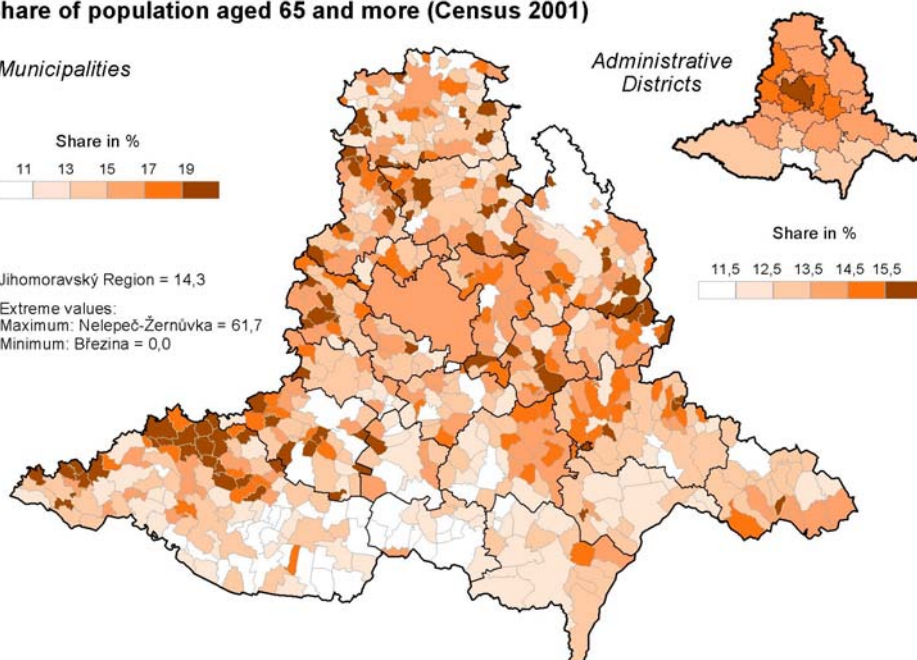
Municipalities



Jihomoravský Region = 14,3

Extreme values:
Maximum: Nelepeč-Žernůvka = 61,7
Minimum: Brežina = 0,0

Administrative Districts



**Agriculture: 1993 - 2003**

Indicator	1993	2003
Agricultural land (ha)	427,790	426,294
Arable land (ha)	359,227	358,062
Persons employed in agriculture, hunting and forestry (thous., LFS)	44.9	20.9
Yields of cereals (tonnes/ha)	3.82	4.06
Cattle stock, total (1 March)	221,611	81,108

Health care

Indicator	Region	CR
No. of physicians per 1000 population	4.2	3.9
No. of beds in hospitals per 1000 population	7.3	6.5
Infant mortality (average for 1999-2003, ‰)	3.5	4.2

year 2003, respectively. Values of the dependency index (the number of persons aged 65+ per 100 persons aged 0-14) are steadily deteriorating: the index was 96.7 in the year 2003.

Low relative level of investment still exists

The development of a modern economic structure in the *Jihomoravský* Region, in which historical as well as geographical factors had a considerable role to play, has been on for more than 200 years already. Today's regional metropolis of *Brno* used to be the capital of the Margraviate of Moravia, and of the Moravian-Silesian Land later on, and developed accordingly. *Brno* was a crystallization nucleus of further industrial development: small factories first, then industrial enterprises (textile factories at the beginning followed by metal-working and engineering enterprises), and later other branches of manufacturing. The *Brno* area had belonged to the most industrialized areas of Austria-Hungary since the 18th century. The favourable influence of the geographical position of the Region was primarily given by the position on the line connecting the south and the north of Europe, which became a reason for constructing roads and railways of international significance, directly connecting the Region with the neighbouring five regions of the Czech Republic and with Austria and Slovakia. During the second half of the 20th century saw the strengthening of arma-

ments production and the production of large plants for energy, chemistry and refineries as well as the monopolization of tractor production. The economy shaped as shown above and with its original strong textile production was then heavily hit by changes in the orientation of the country's economy and changes in market needs on the one hand and by clumsily lost foreign markets on the other hand. Virtually all of these mentioned industries are being phased out fast. The changes in the structure and the orientation of industrial production are far from being completed. In agriculture, the Region remained the biggest grower of cereals achieving highest yields as well as the biggest breeder of poultry and pigs in comparison with the other regions even though employment in this industry is a only little above the national average and steadily decreases. The sector of services has a hundred-year tradition in the Region—be it administration, justice, culture, health or education—and tends to develop further. It takes a supraregional position in all of these areas.

Pupils and students: school year 2003/2004

Type of school	Thous.
Nursery schools	31.0
Basic schools	104.4
Grammar schools	18.1
Secondary technical schools	21.4
Secondary vocational schools	23.6
Higher professional schools	3.1
Universities	45.4

Regionally, comprehensive evaluation of macroeconomic indicators ranks the Region sixth—the Region accounts for 10% of national GDP. A quarter of regional GDP is produced by manufacture, 16% by trade, 13% by business services, 5% by agriculture, and 8% by construction. The share of GDP per inhabitant reaches 91% of the national average of 55% of the EU-15 average.

The Region's share in the gross fixed capital formation of the country is below 9% and in the 4th place among the regions. Gross fixed capital formation per inhabitant amounts to 76% of the national average. Investments are implemented most in transport (21%), manufacturing (20%), real estate (12%), and trade (9%).

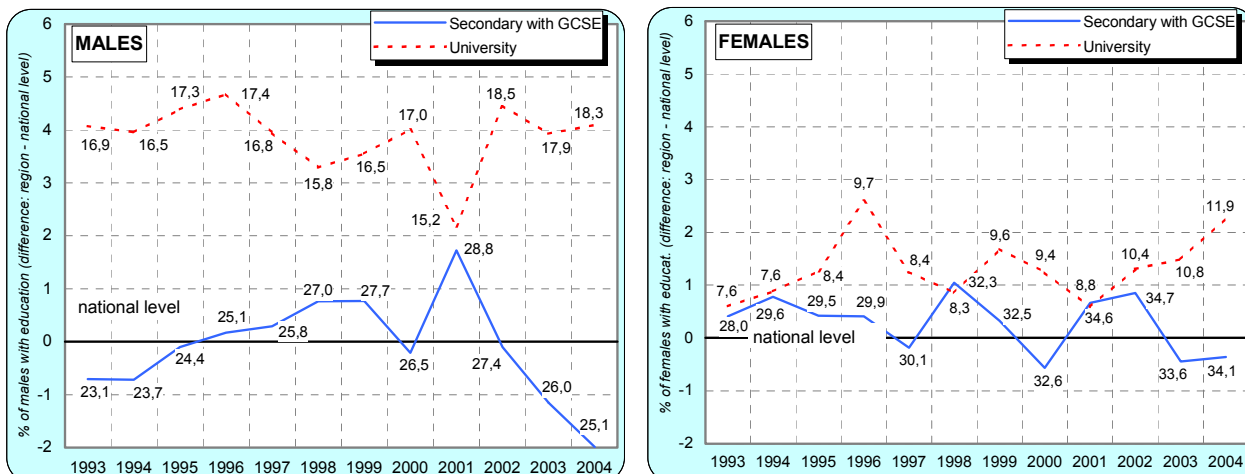
The second centre of learning

Almost 700 nursery schools, more than 450 basic schools, almost 60 secondary vocational schools and more than 130 secondary technical schools and grammar schools – all of these make up the network of school facilities in the Region, which mostly satisfies requirements for placing children and young people in schools. The *Jihomoravský* Region has the second highest proportion (next to Prague) of new entrants in the corresponding age population to secondary schools with GCSE as well as to four-year and multi-year grammar schools. *Brno* is the second most significant centre of higher learning in the CR, second to the capital city of Prague. One fifth of all initial study students in the Czech Republic receive education at 9 universities located in three towns (*Brno*, *Vyškov* and *Lednice na Moravě*). About half of them are students of Masaryk University in *Brno*.

The Region's population has a relatively favourable structure of learning. According to the last census, only 23.4% of the adult population had basic (incl. unfinished) education (compared to 23.5% in the whole of the CR), 37.2% of the population aged 15+ had secondary education without GCSE (the CR 38.0%), and 28.2%

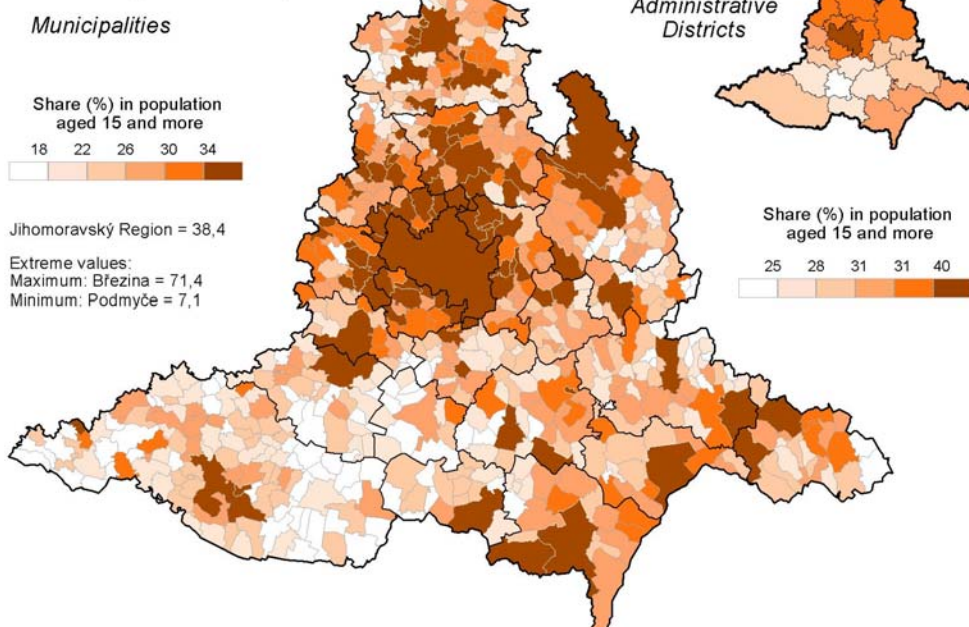


Share of males and females with secondary and university education - relation of region to the Czech Republic

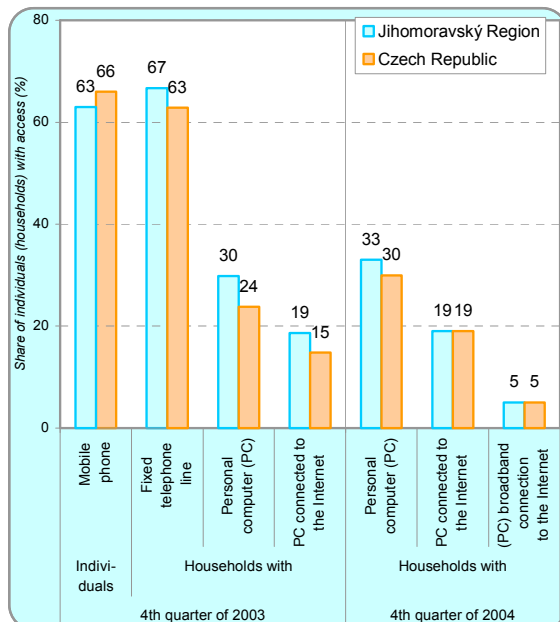


Note: Figures in graph express share of persons with secondary education with GCSE in total population aged 15+ in region, or share of persons with university education in total population aged 25+ in region

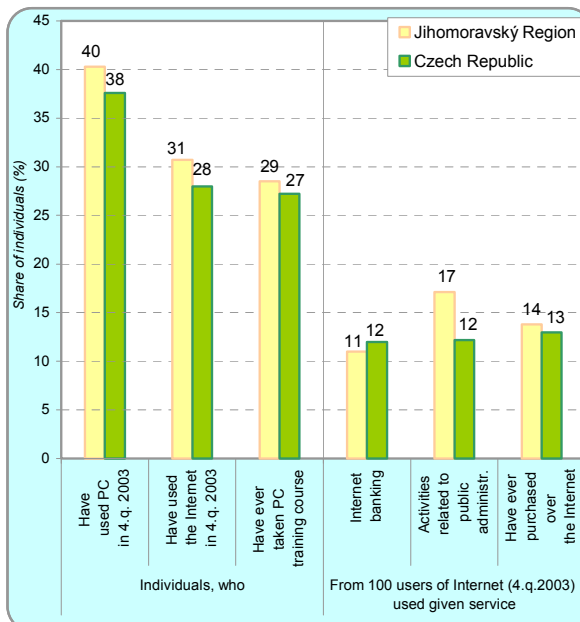
Share of persons with completed secondary or university education (Census 2001)



Access of households to information technologies



Use of Internet by individuals (aged 15+) in 4.q.2003





Participation rate: by age group, %

Age group	Total		Men		Women	
	1993	2003	1993	2003	1993	2003
Total	60.7	58.2	71.4	67.6	50.9	49.4
15 - 19	39.3	4.9	42.6	4.0	35.9	5.9
20 - 24	70.8	65.8	87.9	70.3	52.7	61.1
25 - 29	79.8	78.0	95.0	93.9	63.6	61.5
30 - 34	90.0	85.5	98.8	97.5	80.8	72.8
35 - 39	92.9	91.7	97.1	97.8	88.7	85.4
40 - 44	93.6	91.4	97.7	94.0	89.4	88.8
45 - 49	92.1	93.1	93.3	93.9	90.9	92.4
50 - 54	81.0	86.6	86.8	87.5	75.5	85.8
55 - 59	47.5	56.8	73.9	77.6	24.3	37.9
60 - 64	13.7	22.4	19.3	36.6	9.2	10.1
65+	6.0	3.8	10.4	6.1	3.5	2.3

Participation rate: by educational attainment, population aged 15+, %

Degree of education	Total		Men		Women	
	1993	2003	1993	2003	1993	2003
Basic and no education	27.6	20.8	33.7	21.5	25.0	20.5
Secondary without GCSE	71.8	68.3	80.0	76.6	60.2	56.3
Secondary with GCSE	71.6	65.3	75.6	69.7	68.7	62.2
University	80.6	77.8	82.8	82.0	76.4	71.5

had secondary education with GCSE (in the CR 28.4%). As far as university education is concerned, the difference between the Region and the CR is bigger: 10.4% as against 8.9%, respectively. Also the index of education—the population with full secondary and university education per 100 inhabitants over 25—was higher in the Region (46.8) than in the CR (45.3). Predictably, its highest value belongs to the administrative territory of Brno. The index was still above the national average in the administrative territory of *Kuřim* (48.2), while it was below the average in the other administrative territories. Its smallest values ever were recorded for the administrative territories of *Pohořelice* (28.9), *Moravský Krumlov* (31.2) and *Židlochovice* (33.0). These figures indicate that the territorial differences in learning were considerable.

Social care establishments increase in number

Like in the other regions, the number of physicians increases gradually in the *Jihomoravský* Region, too. The number of beds in hospitals seems to be stabilized, but it is 9% down on the number in 1991. Physicians in non-state establish-

ments gradually increase in number the reason being the transfer of health establishments under the Region's administration. Currently, there are over 70% of physicians working in non-state establishments in operation. The number of pharmacies also increased in number, by half compared to 1994. In late 2003 there were 23 hospitals, 7 specialized therapeutic institutions, 214 pharmacies and dispensaries, 526 surgeries of physicians for adults, 232 surgeries of physicians for children and adults, 602 surgeries of stomatologists, 121 surgeries of gynaecologists, and 639 surgeries of physicians-specialists. In the course of time both the percentage of incapacities for work and the average duration of one incapacity-for-work case have increased, and both of the indicators stand above the nationwide figures today.

The latest data on social care establishments reveal that there were 11 children's homes, 29 social care institutions for adults and young people, 26 retirement homes, 26 boarding houses for pensioners, and 61 community care service houses in the Region in 2002. The number of social care establishments and of places in them virtually rises every year, the high-

est increases being recorded for new community care service houses and then for various charitable and asylum homes, hostels, homes for mother with children, etc. The number of state social care support benefits has recently dropped in the *Jihomoravský* Region. It is a result of the abolishment of some benefits and more stringent conditions introduced for granting some benefits.

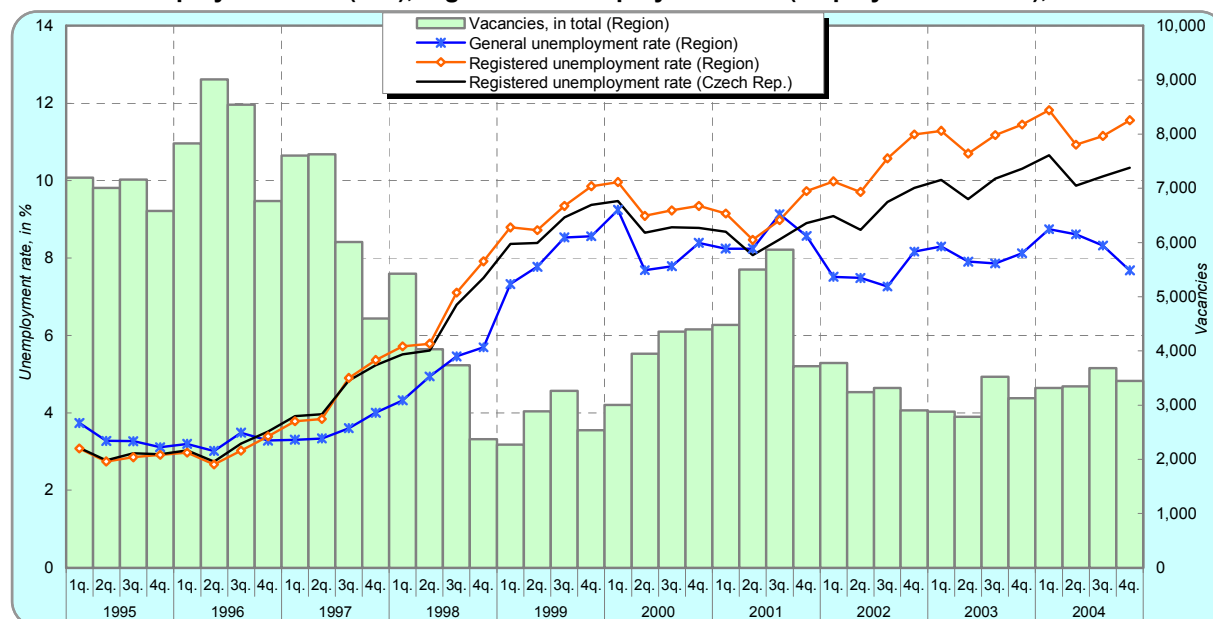
A decline of the industry, good progressive services

The proportion of the *Jihomoravský* Region's economically active population does not reach the average value in the CR. The participation rate of women is moderately above the average, as is the participation rate in the age group of 45-59 years. The proportion of the economically active in the working-age population has been mildly below the average value of this proportion for the CR for 40 years already. The proportion of women in the total economically active population has been long differing from the average only marginally.

The proportion of the employed in the primary sector slightly exceeds the proportion of persons employed in this sector in the whole of the CR. Over last 10 years the employment industry has been steadily decreasing in proportion to today's value of less than 30%. Undoubtedly, a sizeable drop in employment in the industry in the Region's centre—the city of *Brno*—had had an important role to play here: traditions of the *Brno* textile industry lasting more than 150 years came almost to an end, and the tradition of mechanical and electrical engineering is following suit after large enterprising employing several ten thousand people had first limited and then closed their operation. The proportion of people employed in construction exceeds the national average, and above-average employment is also in market services and services of mostly public nature (education, health, social care, etc.). Employment in progressive services, also referred to as the quaternary sector, has been

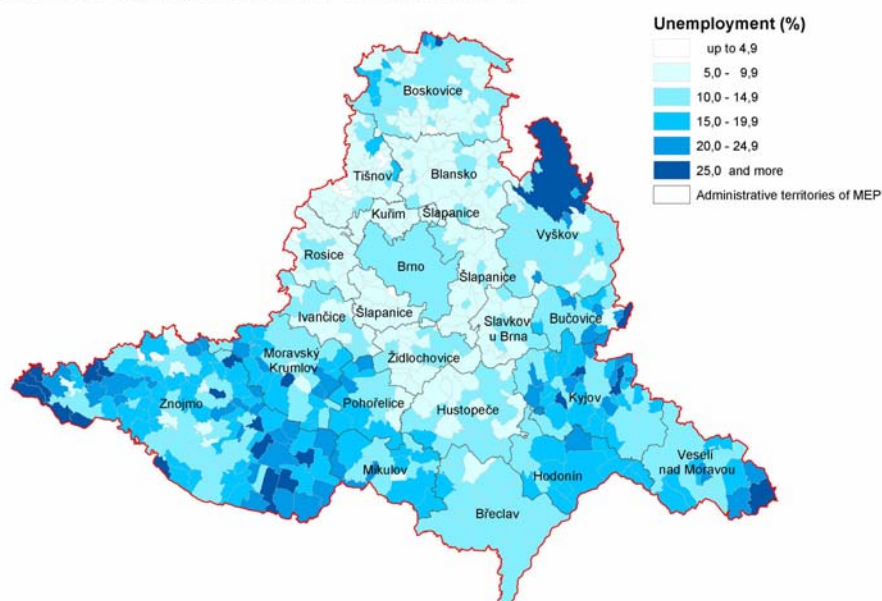


General unemployment rate (ILO), registered unemployment rate (employment offices), vacancies



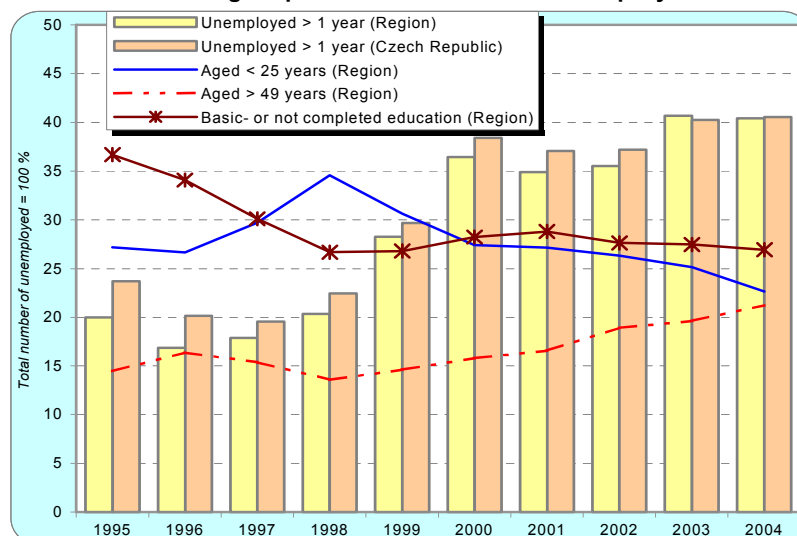
Note: Registered unemployment rate refers to the end of respective quarter

Registered unemployment rate (31 December 2004)



Data source: Ministry of Labour and Social Affairs

Share of selected groups in total number of unemployed*



* refers to 31 December (respective year)



Structure of disposable income of households

		1995		2002	
		CZK million	Per capita (national level=100)	CZK million	Per capita (national level=100)
		Allocation of primary income account of households			
Resources	Operating surplus and mixed income, net	25,230	102.7	35,243	95.0
	Compensation of employees	64,434	91.7	111,070	95.3
	Property income	7,566	93.6	8,160	89.4
Uses	Property income	2,787	101.9	2,749	103.4
	Balance of primary income, net	94,443	94.3	151,724	94.7
		Secondary distribution of income account of households			
Resources	Social benefits other than social benefits in kind	17,948	101.8	35,461	103.0
	Other current transfers	5,660	97.1	8,677	96.5
Uses	Current taxes on income, wealth, etc.	7,253	91.8	11,687	92.6
	Social contributions	22,160	91.7	39,374	94.1
	Other current transfers	4,047	98.8	8,974	98.4
	Disposable income, net	84,592	96.7	135,827	97.0

the second highest (next to Prague) for more than 10 years.

Enterprise in the *Jihomoravský* Region is at an average level, with an above-average proportion of the self-employed with employees. The educational level of the self-employed is the second highest (next to Prague, too).

Above-average unemployment practically in all districts

Since the 1990s, the development of the labour market in the *Jihomoravský* Region has been shaped by several factors. The transformation and development of agriculture resulted in a steep reduction of employment in the primary sphere—the employment dropped almost to a half. A number of production enterprises with thousands of employees or even more slashed or wound up their operation, which especially applied to industries such as manufacture of textile and clothing, mechanical and electrical engineering, manufacture of building machines, manufacture of arms and ammunition, construction, etc. The proportion of persons employed in the secondary sphere decreased by about 10%. The employees made redundant in the this sphere moved to

the tertiary one where they either increased the employment, by a tenth, or reinforced the ranks of unemployed people: since 1990, the rate of registered unemployment has risen sixteen times and now it ranks the Region eleventh—a higher employment rate is only in the *Ústecký*, *Moravskoslezský* and *Olomoucký* Regions. Around the town of *Brno* and in the northern part of the Region are areas with average or above-average unemployment. In the southern part of the Region, along the Austrian border, there are districts where unemployment is clearly above the average or even extremely high in some places. Similar areas also exist in the Region's eastern tip, at the Slovak border. Except for two districts (*Brno-venkov* and *Blansko*) with slightly below-average unemployment, the unemployment in all the other districts is higher than the Region's average—in some by more than a half. According to labour offices, unemployment in 2003 was above the average in the districts of *Břeclav*, *Hodonín* and *Znojmo* while in the other districts it was lower than both the Region and country's averages. All categories has recorded an increase in the number of unemployed job applicants since

2000 by about a fifth, the exception being unemployed school graduates and unemployed young people whose number dropped by a fifth, too. The number of job applicants related to one vacancy exceeds the national average by a half. A third of the unemployed are on the unemployment benefit.

All categories of employees affected alike by incomes falling behind

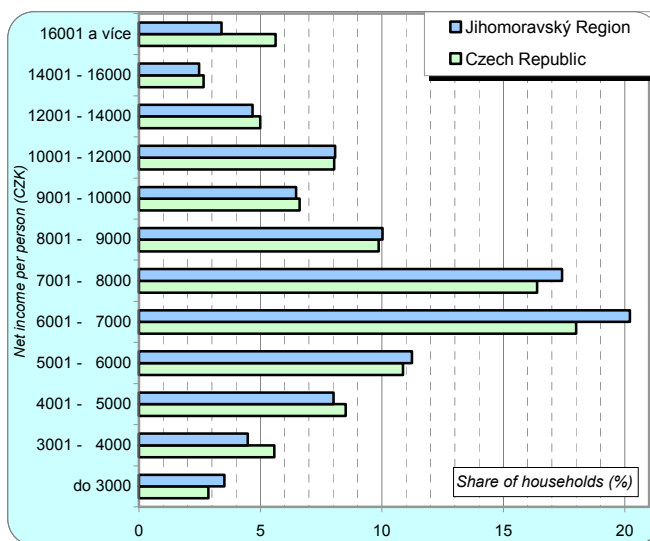
Disposable income per inhabitant has been ranking the *Jihomoravský* Region sixth among the CR's regions for six years already. The income reaches almost 96% of the national average. The average monthly wage is the fifth highest; it was CZK 15 753 (a bit over € 500) at the close of 2003. Since 2001, there has been a slight tendency to diminish the lagging behind the average level of gross wages in the country.

The individual groups of occupations fall behind the average in the CR about alike, namely by 10 to 15%; only the wages of manual workers in the primary sector are at the level of national average. No tendencies concerning the average hourly wages—educational attainment dependency are observable; only wages of university graduates fall behind a little bit. Similarly, no mutual disproportions are observed in wages in individual age groups, either (i.e. disproportions that would indicate discrimination in favour of some groups of employed persons). Hourly earnings of manual and non-manual workers are about the same and correspond to the country's average. Comparisons of wages in individual sectors and regions show that persons engaged in non-market services are paid better (fourth placing) than those in market services (second placing) and that wages of persons employed in agriculture are noticeably low (third lowest placing).

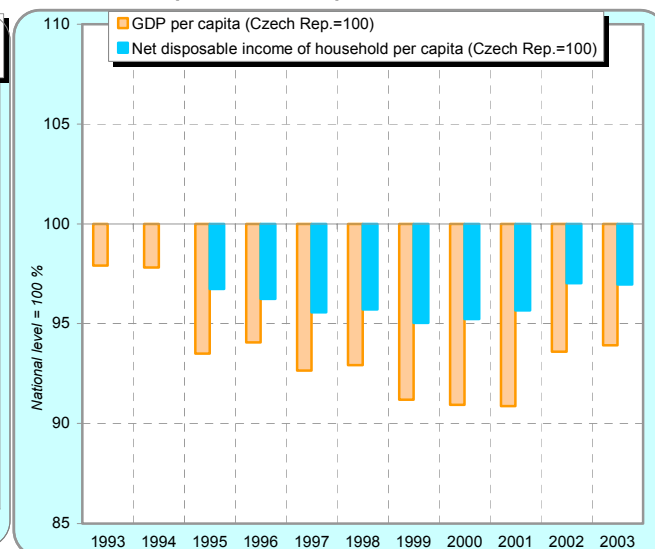
The proportion of social incomes in gross incomes exceeds a quarter and is in the middle of the list. Households that get by easy with income (according to their opinions)



Distribution of households (%): monthly net money income per person (%), in CZK, Microcensus 2002

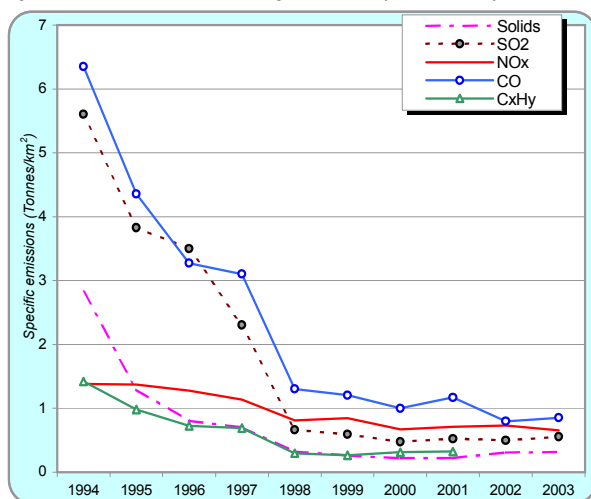


Gross domestic product and disposable income

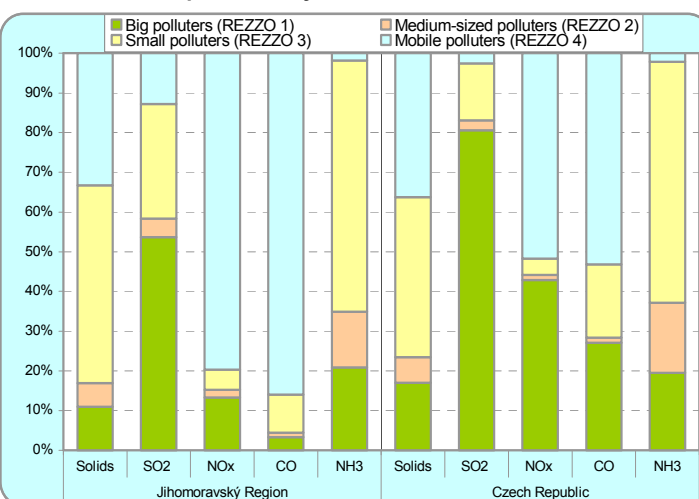


Note: Data on disposable income are available since 1995

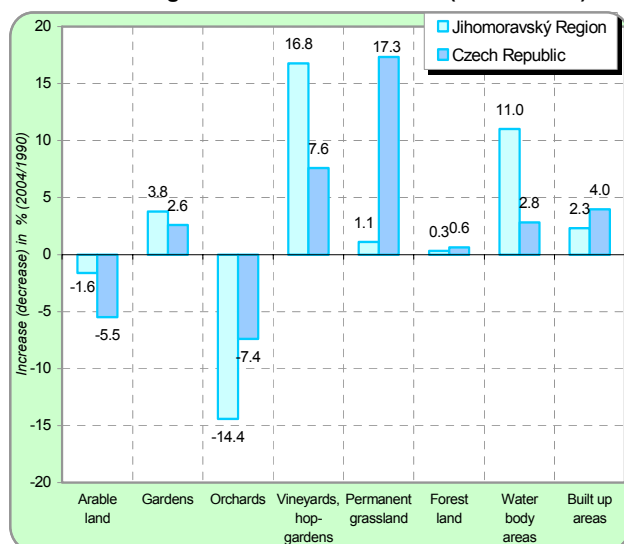
Specific emissions of main pollutants (REZZO 1-3)



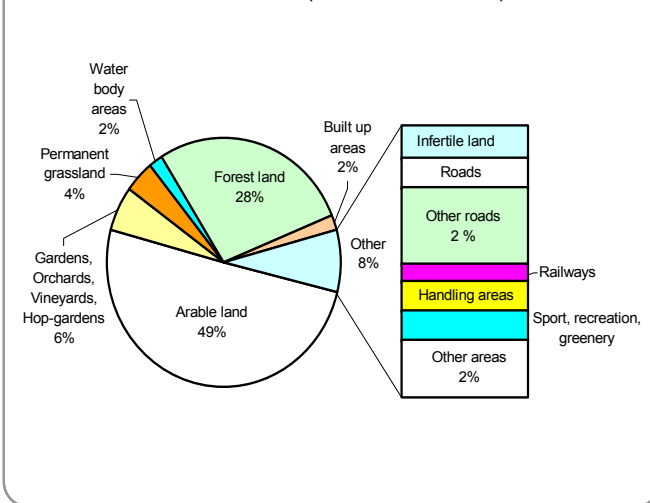
Structure of main pollutants by sources in 2003



Land use - changes between 1990 and 2004 (31 December)



Land use structure (2004, 31 December)





Tourism: 1996 - 2003

Indicator	1996	2003
Guests in accommodation establishments	857,207	1,040,645
From the CR	558,083	709,946
From abroad	299,124	330,699
Number of overnight stays	2,096,194	2,447,426
CR nationals	1,465,343	1,800,402
Foreign nationals	630,851	647,024
Average length of stay (days)	3.4	3.4

account for 19% (less than the country's average) and households complaining about their worsening financial conditions make up 36% (slightly above the national average).

A strong potential of highly skilled labour

The region with an above-average area and above-average population has more than 50% of its area covered with arable land, most among the regions. On the other hand, the proportion of the area covered by forests is the third smallest. Owing to favourable climatic and soil conditions the Region's crop production is focused on demanding plants. Almost one sixth of the national output of cereals is produced here, with the biggest yields per hectare compared to the other regions. Specialized agricultural production such as fruit growing and market gardening has a long tradition, and of all the vineyards in the CR 90% can be found here. Also, most poultry and most pigs are raised in the Region, with the highest breeding intensity. The share of the primary sector in total gross value added in the Region is 5% only (the year 2001), and this sector employs 6% of economically active population (LFS 2001).

The *Brno* area is the core of the *Jihomoravský* Region. With a number of large textile, engineering and other factories it belonged to the most industrialized areas of Europe as early as the 19th century. The restructuring of the industry and recent changes in the market, though, caused activities of many large enterprises to decline; tens of thousands of jobs were lost in consequence and employment moved from both primary and secondary sectors to the sphere of services. The industry share in total gross value added

stands at 30% only, being the second smallest next to the *Hl. m. Praha* Region and not changing with time. The industry employs less than 30% of economically active population (LFSS 2001), which is also the second smallest proportion. Seen from the angle of employment, food industry, textile industry, manufacture of machinery and equipment, and woodworking are still significant industries. The Region's export performance mildly exceeds the average. Nationally, the Region covers almost the whole exports of tractors, three quarters of exports of boilers and parts for office and data processing machines, and half of the exports of textile non-cotton fabrics, special yarns and optical devices.

As the centre of the Region the town of *Brno* has a significant share in the development of the tertiary sphere: historically, a land administration system and associated services (education, health culture, justice, etc.) developed there. Today, central bodies of justice (the Constitutional Court, the Supreme Court, the Supreme Administrative Court) are found there, as are the Ombudsman's Office, 33 faculties in state-owned and private universities and top health and cultural establishments. The tertiary sector accounts for almost 60% of gross value added in the Region and has a similar share of employees.

Potential to develop all types of transport

In what is the *Jihomoravský* Region now, transport routes have been built for centuries to link the Region's capital (and also the Moravian-Silesian Land before) and the nearest and most remote localities. The development was neglected in the second half of the 20th century, which slowed

down the speed of natural development of the transport networks noticeably, especially at the outskirts of the Region. It affected the road network in such a way that in most of its indicators the Region finds itself in the last third of the ranking of the regions.

Transport routes pass through the Region to connect it not only with all of its neighbouring regions—it has most of them in the CR: 5 national, 1 Slovak (*Trenčanský*) and 1 Austrian (Lower Austria) – but also with many European countries. The most important road route is the motorway D1 linking the Region via Prague with the West European motorway system and, after completion, the route via *Ostrava* to Poland and even further to the north. Heading for the southeast is the motorway D2 to connect the Region via *Bratislava* to the motorway networks of Slovakia and Hungary. Of importance is also the north-south transport route that links western Poland with Vienna (via *Brno*) and the Austrian motorway system. The west-east route *Plzeň – České Budějovice – Brno – Trenčín* is also frequented. All these routes are part of the European transport system, which also incorporates the road Vienna – *Znojmo – Jihlava* in the Region's southwestern part where the road joins the motorway D1.

Brno –Vienna railway lines have existed since the first half of the 19th century, the main ones being *Břeclav – Brno – Praha*, *Brno – Česká Třebová*, *Brno – Vlárský průsmyk*, with connection to the Slovak arterial line *Bratislava – Košice*, and also *Brno – Přerov* with link to the Moravian north-south route *Budapest – Břeclav – Přerov – Warsaw*.

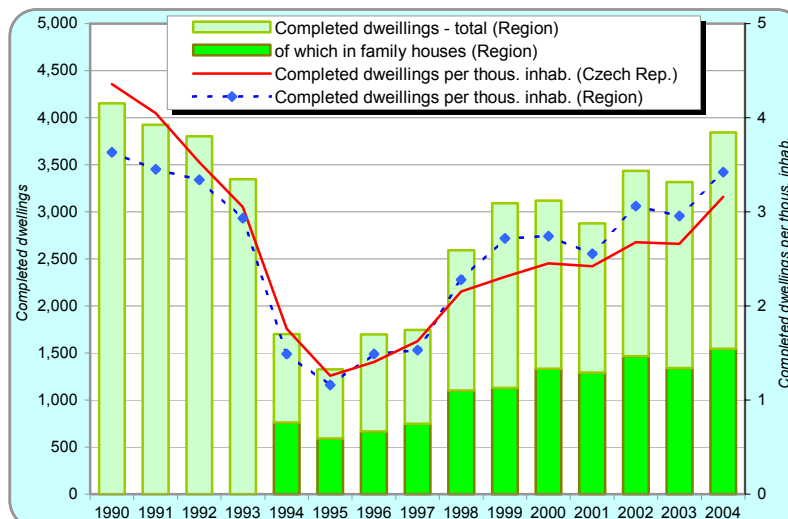
Air transport services, for the time being of mostly charter and freight types, are rendered by the airport in *Brno*, which thanks to good weather conditions there also serves as a backup airport for Prague and Vienna airports.

Over a million visitors

From the international tourism point of view, the *Jihomoravský* Region's landscape and cultural historic areas take up the most significant

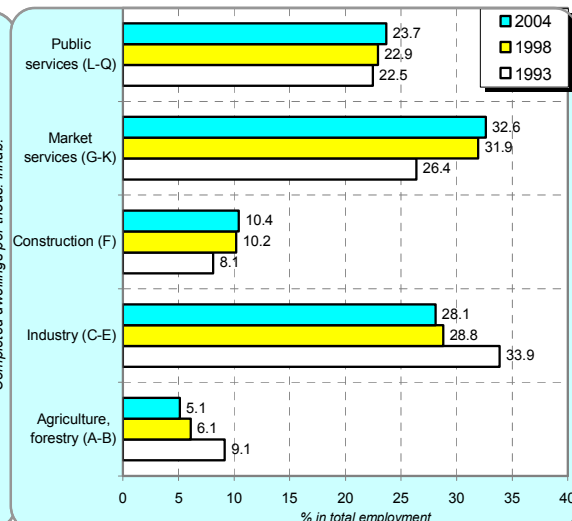


Completed dwellings - in all buildings / in family houses



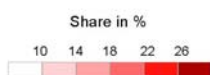
Note: data on dwellings in family houses are available since 1995

Employment in major sectors (groups of NACE)



Share of unoccupied dwellings in total dwelling stock

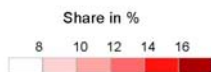
Municipalities



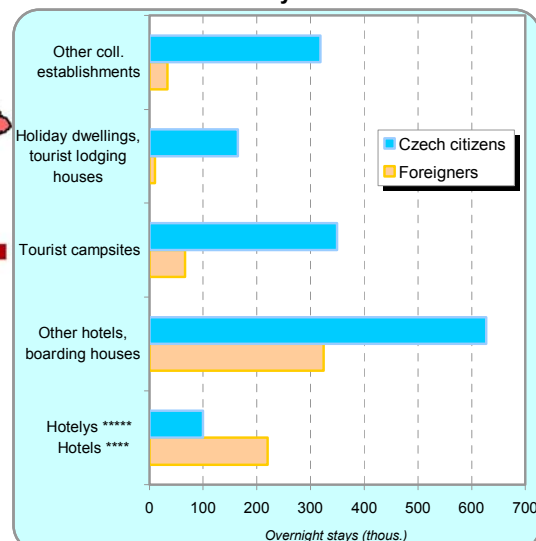
Jihomoravský Region = 10.9

Extreme values:
Maximum: Podhradí nad Dyjí = 69.1
Minimum: Malá Roudka = 3.2

Administrative Districts



Overnight stays in collective tourist accommodation establishments in 2004 - by class



position. This especially holds for the *Lednice-Valtice* area (on the UNESCO List) with its two prominent castles, *Lednice* and *Valtice*, and extensive parks. *Moravský kras* (the Moravian Karst) is another significant area where *Punkevní jeskyně* (the River Punkva Caves) and *Macocha* (Gorge) are the best-known localities. The area of *Slavkov battlefield* is a locality of European significance. Many historic monuments are also found in *Brno*. *Znojmo* is a historic town; it has an extensive underground corridor system is a starting point for trips to the unique nature of the *Podyjí* National Park. The development of tourism in which cycling and traditional vine-growing are involved belongs to the Region's strong points.

The year 2003 brought an unprecedented rise in the number of tourists—over 1 million tourists stayed temporarily in the Region. The Region is second to Prague as to the number of multi-star hotels, most of them being in the town of *Brno*. Most foreign tourists, about one third of all, are from Poland and Germany, but a lot of visitors come from Slovakia and Austria, too. The average length of stay shortened over last years and is about 3.5 days now. Czech tourists stay longer than foreign ones.

New dwellings around Brno

There were 240 thousand houses in Region (Census 2001), of which 13.6% of houses were marked as unoccupied. Typical of the Region is rather a large of proportion of

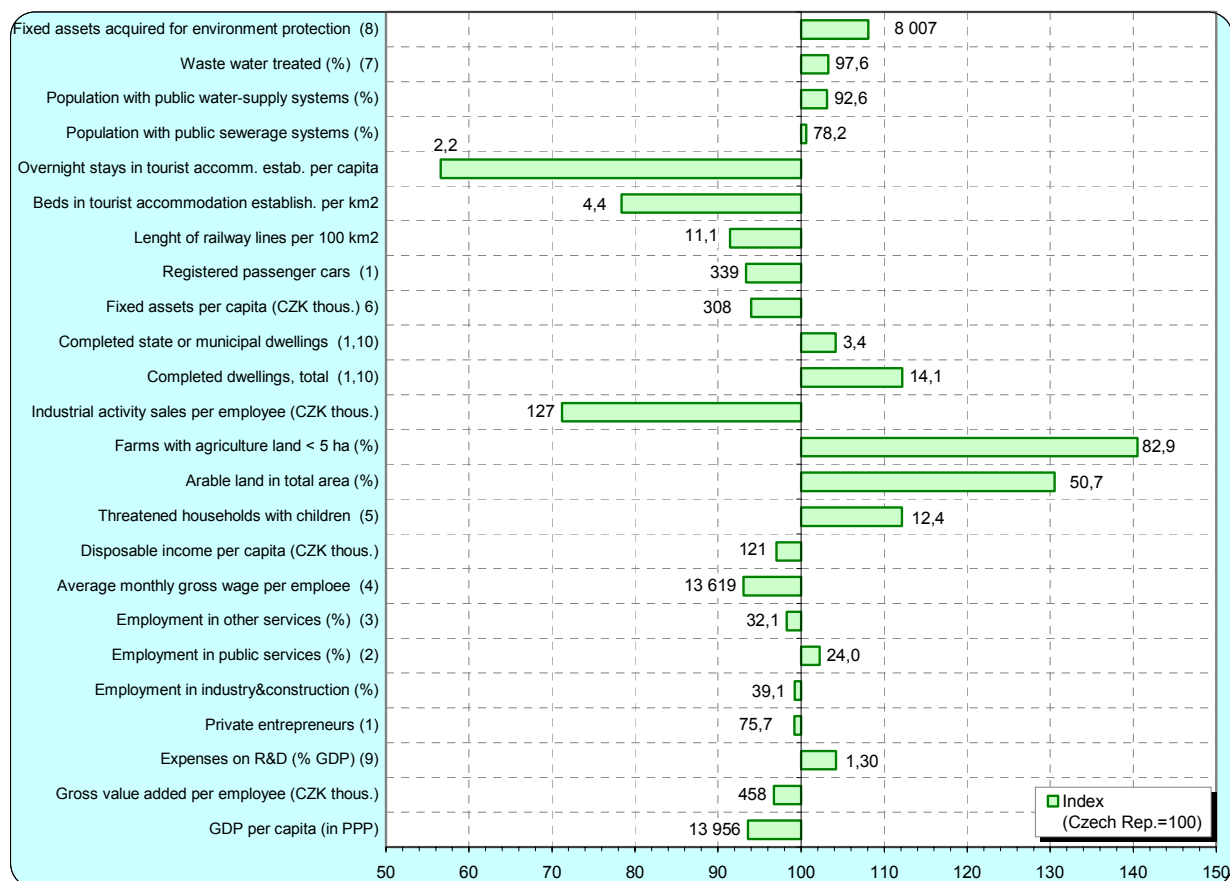
family houses—90.2% in 2001—bigger than the national 86.3%. The dwelling stock of the *Jihomoravský* Region included more than 450 thousand dwellings, of which 10.9% were unoccupied. Between the censuses in 1991 and 2001, the number of permanently occupied dwellings increased by 2.7%, (national figure is 3.3%).

After the decline in the 1990s, the housing construction revived, (in two last years). Most dwellings were completed in family houses (over 40%).

More than half the dwellings completed recently fall on the districts of *Brno-město* and *Brno-venkov*. Dynamics of the housing construction is considerably affected by the migration of the inhabitants of the town of *Brno* to the surroundings of the town.



Economy and environment - region compared with the Czech Republic



¹⁾ Per 1000 inhabitants

²⁾ NACE L-O (Public administration and defence; Compulsory social security, Education, Health and social work, Other community, social and personal service activities)

³⁾ NACE G-K, resp. P-Q (Wholesale and retail trade, Transport, storage and communications, Financial intermediation, Real estate, renting and business activities)

⁴⁾ Work-place method (in 2001, CZK)

⁵⁾ Share of families with children registered by social care authorities ("social needed persons") in total number of families with children (% , 2001)

⁶⁾ Enterprise head-office method (i.e. seat of business), sum for period 1995-2001

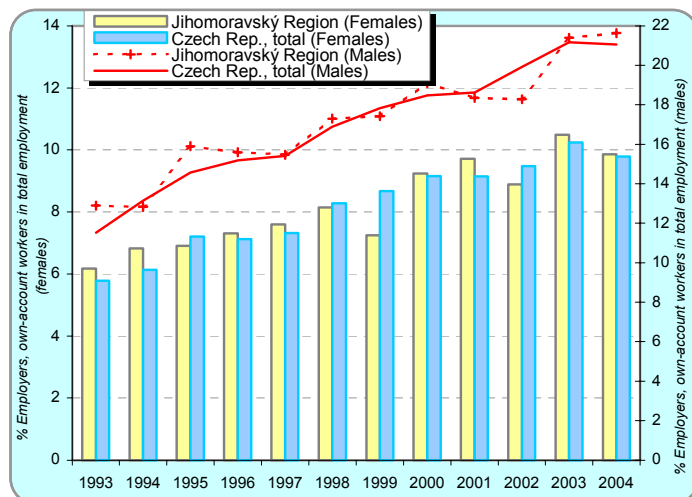
⁷⁾ Related to total waste water discharged into public sewerage systems (=100%)

⁸⁾ Work-place method (i.e. real place of realization), sum for period 2000-2003 (CZK, per capita)

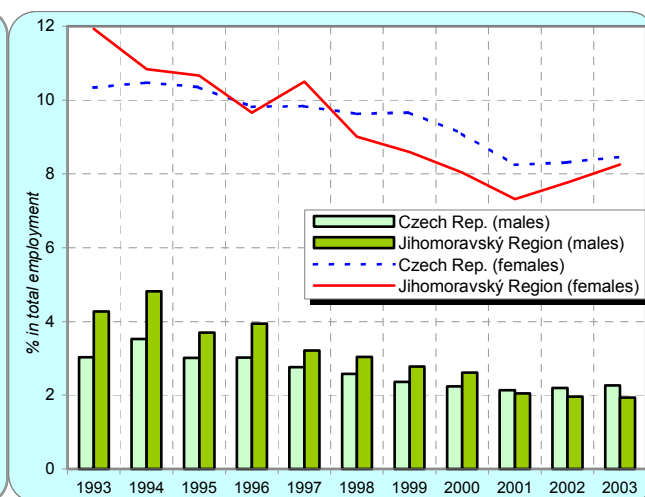
⁹⁾ Average for period 2001-2003

¹⁰⁾ Sum for period 1999-2003

Employers and own-account workers - males, females



Part-time employment - males, females





Position of region among system of european NUTS-3 regions (rank: 1 = highest value)

Indicator			Postion among NUTS-3 regions in given territory (number of NUTS-3 units)					
			Region (Jihomoravský)	Czech Republic (CR)	NUTS-3 regions adjoining CR	EU -10 New states	EU-15 Former states	EU-25 total
			(1)	(14)	(27+14) ¹	(123) ²	(1 091+14) ²	(1 214) ²
1	Population density (2002)	Value	159.0	129.4	126.2	100.8	120.3	116.6
		Rank	x	3 / 14	13 / 41	21 / 117	552 / 1105	569 / 1208
2	Total population increase (1995-2002) ³	Value	-2.4	-1.8	-4.0	-1.4	2.7	2.0
		Rank	x	12 / 14	25 / 40	76 / 117	823 / 1078	887 / 1181
3	Natural population increase (1995-2001) ³	Value	-2.1	-2.0	-0.9	-0.7	0.9	0.6
		Rank	x	11 / 14	25 / 40	77 / 111	785 / 1078	851 / 1175
4	Mgrration population increase (1995-2001) ^{3,4}	Value	-0.3	0.1	-1.6	-0.7	1.9	1.4
		Rank	x	10 / 14	20 / 40	48 / 111	754 / 1078	792 / 1175
5	GDP per capita (2002), in Purchasing Power Parity	Value	13,398	14,315	10,912	10,966	23,164	21,172
		Rank	x	2 / 14	14 / 40	19 / 121	983 / 1101	1000 / 1208
6	GDP per capita (1995), in Purchasing Power Parity	Value	9,967	10,660	7,882	7,118	16,869	15,233
		Rank	x	5 / 14	19 / 40	12 / 115	974 / 1076	981 / 1177
7	Share of economically active in total population (% , 2002)	Value	48.9	50.0	45.3	45.5	46.8	46.6
		Rank	x	11 / 14	24 / 41	32 / 123	333 / 986	354 / 1095
8	Sh.of economically active women in total women pop. (% , 2001)	Value	42.7	43.4	39.8	40.5	39.2	39.4
		Rank	x	9 / 14	16 / 28	40 / 114	171 / 585	202 / 685
9	Employment in agriculture, forestry and fishing (% , 2001)	Value	4.8	4.8	12.1	17.0	4.0	6.0
		Rank	x	8 / 14	24 / 40	89 / 113	465 / 1063	546 / 1162
10	Employment in industry and construction (% , 2001)	Value	38.9	40.1	36.2	30.5	25.9	26.6
		Rank	x	13 / 14	24 / 40	31 / 113	129 / 1063	147 / 1162
11	Employment in services (% , 2001)	Value	56.3	55.2	51.8	52.5	70.1	67.3
		Rank	x	2 / 14	10 / 40	33 / 113	861 / 1063	892 / 1162
12	Unemployment rate, total, based LFS (% , 2003)	Value	8.1	7.8	18.0	14.5	8.1	9.1
		Rank	x	4 / 14	19 / 40	84 / 123	321 / 991	396 / 1100
13	Unemployment rate, women, based LFS (% , 2003)	Value	9.9	9.9	16.7	15.3	8.9	10.0
		Rank	x	4 / 14	12 / 28	70 / 123	169 / 591	233 / 700
14	Unemployment rate, persons up to 25 years, LFS (% , 2003)	Value	21.9	18.6	26.7	32.3	15.8	18.4
		Rank	x	4 / 14	10 / 28	69 / 123	107 / 494	172 / 603
15	Bed in hotels and similar establishments per capita (2002)	Value	15.0	24.1	15.2	10.5	26.1	23.6
		Rank	x	10 / 14	28 / 41	25 / 118	623 / 1105	638 / 1209

¹ Missing data of regions:

2 NUTS-3 regions in Silesia (all indicators apart from no. 1,7,15) were replaced by figure for whole Silesia region (NUTS-2)

17 NUTS-3 regions in Germany (indicators no. 8,13,14) were replaced by 5 respective NUTS-2 regions

Different date : indicators no. 2 and 3 (all regions refer to 1997-99), indicators no. 12-14 (all regions refer to 2001),

indicator no. 7 (all regions in Germany refer to 2001)

⁴ Missing data of regions:

Germany - 439 regions (indicators no. 8,13 and 14), France - 100 regions (indicator no. 14)

Greece - 51 regions (indicators no. 7,8,12,13 and 14), Netherlands - 40 regions (indicators no. 9,10 and 11)

Portugal - 30 regions (indicators no. 2-4, 6-8 and 12-14), Estonia - 4 regions (indicator no. 15) and Latvia - 4 regions (indicator no. 1)

Different date : all regions in Germany - indicators no. 2 and 3 (1995-1999), indicator no. 12 (2001)

all regions in Great Britain - indicators no. 7,12,13 and 14 (2001)

all regions in Portugal, Cyprus and Luxemburg - indicators no. 9,10 and 11 (2000)

all regions in Slovakia - indicator no. 15 (2003), and all regions in Scotland - indicator no. 15 (2000)

all regions in Latvia - indicator no. 8 (2002)

³ Expressed as an average of yearly-increases (as a difference between mid-year population)

⁴ Migration increase is calculated as a difference between total increase and natural increase

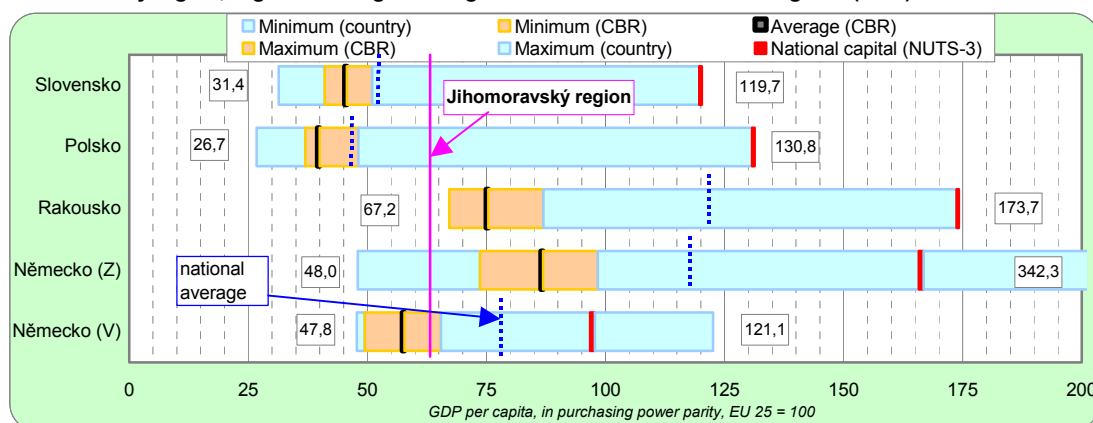
Source: DB Regio, Eurostat

Note: Some figures (for CR and its regions) may differ (mainly due to revisions) from those stated in the previous part of this chapter.

This table tries to describe region in a wider international context, indicators were selected to cover maximum of EU regions (in given time)

GDP (in Purchasing Power Parity) per capita in specific groups of NUTS-3 regions in 2002:

Jihomoravský region, regions in neighbouring countries and cross-border regions (CBR)¹



¹ Cross-border regions include all NUTS-3 regions adjoining to the Czech Republic