

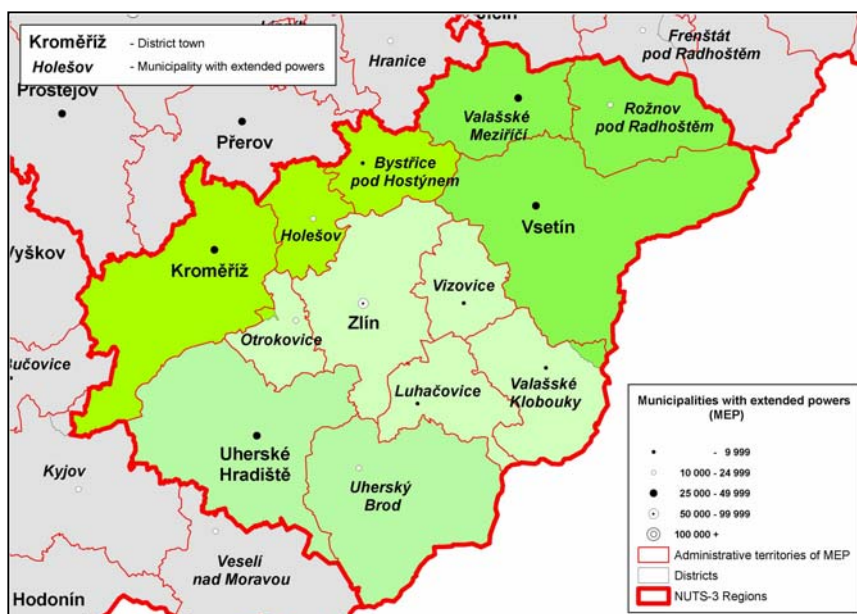


ZLÍNSKÝ REGION



The western hills and foothills of the White Carpathians, the southern part of *Moravskoslezské Beskydy* (Mountains), *Hostýnsko-Vsetínská hornatina* (Mountains), the southern part of *Hornomoravský úval* (Graben) with the northern part of *Dolnomoravský úval* (Graben), and *Chřiby* (Mountains) make up the area of the Zlínský Region. The Region borders on the *Jihomoravský Region* in the southwest, the *Olomoucký Region* in the northwest (with which it creates one unit of a higher magnitude, NUTS 2—a subject of discussions about aid and cooperation in the framework of the European Union), and the *Moravskoslezský Region* in the north. It has a 120-km common border in the east with Slovakia, mostly with the *Trenčianský Region*, and a short border section with the *Žilinský Region* in the north.

With its area of 3 964 km² (the eleventh among 14 regions), the Region only occupies 5% of the area of the Czech Republic. The 49% share of agricultural land is the fifth smallest, as is also the share of arable land (32%). Woodland covers



40%, which is the third largest figure in comparison with the other regions.

The Region is defined by the areas of the districts of *Kroměříž*, *Uherské Hradiště*, *Vsetín*, and *Zlín*. In this composition, it constitutes a newly established administrative unit without any historical pattern. The significance of the Region's individual places kept changing from early Middle Ages—from Great Moravian centres in *Staré Město* and *Sady* near the town of *Uherské Hradiště*, medieval centre *Uherské Hradiště* (from the 13th century to the 1930s), growth of the small townlet of *Zlín* after World War I up to the significance of today's regional capital. The Region's 304 municipalities have an average cadastral area of 13.04 km² and an average population of 1 951 (the sixth most populated region of the CR, 19% above the national ave-

rage). Less than 6% of the population live in municipalities with up to 500 inhabitants (two thirds of the CR's population living in the municipalities of this group). 29% of the population live in municipalities with up to 2 000 inhabitants (26% in the CR) and 56% in municipalities with up to 10 000 inhabitants (almost a quarter above the national average). Over 13% of the population live in the Region's capital—the fourth lowest percentage among the regional capitals.

There are 13 administrative districts of municipalities with extended powers in the Region. Altogether, they cover an area of 110 km² to 660 km² and take care for 16 thousand to 101 thousand inhabitants. Traditionally, the Region's population is business minded and the contribution of small enterprises to employment is thus great. The Region's percentage of pre-working age

Selection of topical indicators

Number of inhabitants (31.12.2004)		590,706	Average monthly gross wage (2004) ⁴		15,638
incl.	Foreigners with long-term stay ¹	3,429	Unemployment rate based on LFS (%; 2004)		7.4
	Foreigners with permanent residence	2,943	Employment in sectors (%; 2004)	Primary	4.0
Number of municipalities / towns (31.12.2004)		304 / 30		Secondary	46.3
Population living in the regional capital (%)		13.3		Tertiary	49.7
Live-born children outside marriage (%; 2004)		20.3	Completed dwellings, total (2004)		1,494
Population with university education ² (2004)	males	9.8	incl. Dwellings in family houses (%)		53.8
	females	7.2	Guests in accommodation establishments, total (2004)		522,355
Economically active population (2004)		288,758	incl. Foreign nationals (%)		15.6
incl. Employers or own-account workers (%)		17.5	GDP per capita (Purchasing power parity, 2003)		12,822
Economic activity rate (2004) ³	males	67.6	Gross fixed capital formation per capita (in CZK, 2003)		56,278
	females	48.3	Net disposable income of households per capita (CZK, 2003)		119,442

¹ Foreigners with visas over 90 days

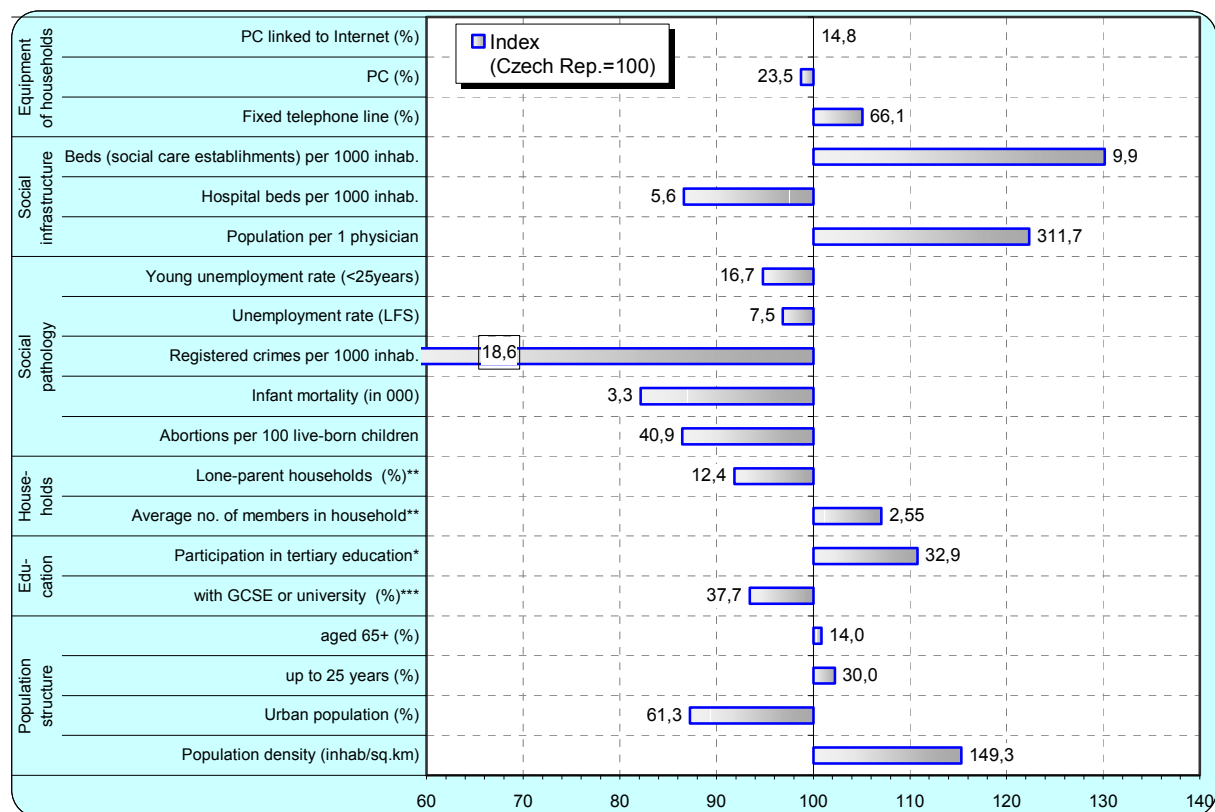
² Related to population aged 15+

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+

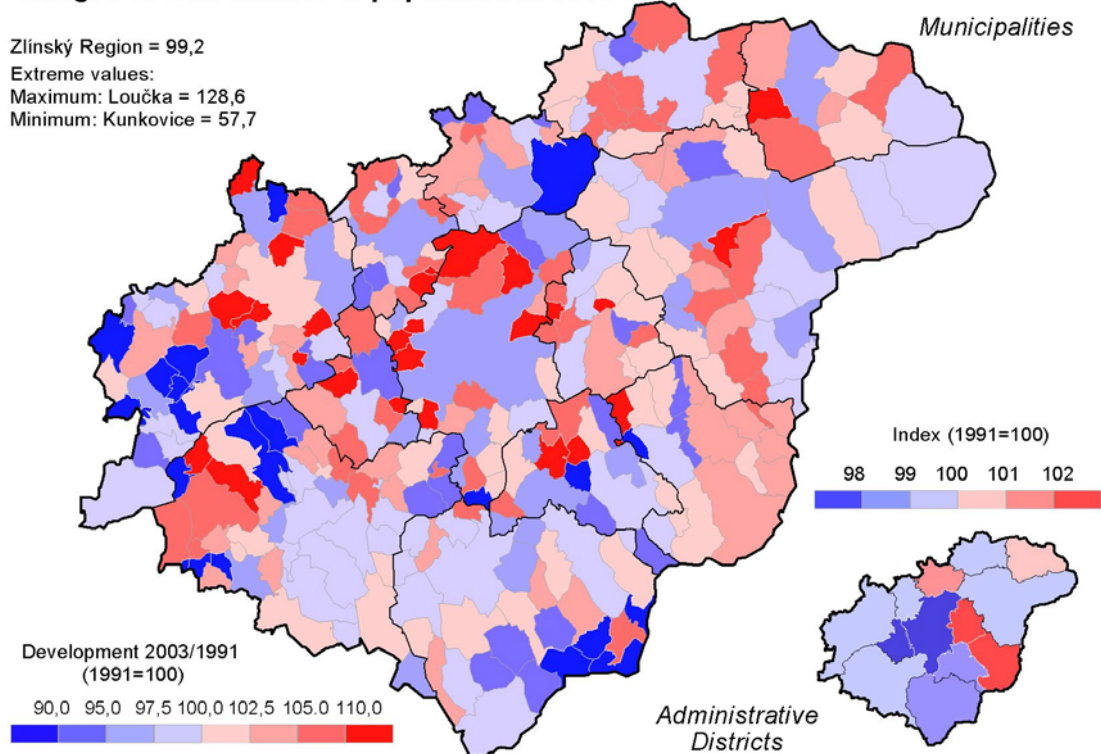
Changes of total number of population in 1991-2003

Zlínský Region = 99,2

Extreme values:

Maximum: Loučka = 128,6

Minimum: Kunkovice = 57,7





Population and vital statistics: 1993/2003

Population, 31 December 1993	600,915
Live births (average for 1994-1998)	5,485
Deaths (average for 1994-1998)	6,424
Net migration (average for 1994-1998)	514
Population, 31 December 1998	598,789
Live births (average for 1999-2003)	5,203
Deaths (average for 1999-2003)	6,108
Net migration (average for 1999-2003)	94
Population, 31 December 2003	591,866

Age distribution of the population: 31 December 2003

Age	Total	Total	Men	Women
	Thous.	%	%	%
0 - 14	90.8	15.3	16.1	14.6
15 - 24	84.4	14.3	15.0	13.5
25 - 39	136.3	23.0	24.2	21.9
40 - 54	125.9	21.3	21.9	20.7
55 - 64	70.9	12.0	11.6	12.3
65 -	83.6	14.1	11.1	17.0
Total	591.9	100.0	100.0	100.0

population is also great as is also the percentage of autochthonous inhabitants. The Region's environment is little disturbed; an extensive part of the Region includes protected landscape areas. Historical heritage, natural conditions and a range of cultural and folklore traditions are prerequisites for further development of tourism.

Demographic conditions influenced by above-average religiousness

The number of inhabitants of the Region diminishes and the main reason is population decreases by natural change. Recently, however, the Region has been losing its population by migration too. The birth rate is below the national average, more and more children are born out of wedlock, which has to do with the attitude of young generation to marriage. The proportion of illegitimate children (18.2% in

2003) is still among the smallest in the regions. The death rate is still below average, though it is coming close to the national average. The number of emigrants has been bigger than the number of immigrants since 2001 and numbers of the migrants grow every year. The number of new marriages ceaselessly decreases—the 2003 was a record-making year in this connection because it saw the smallest number of marriages ever entered into since the year 1961. On the other hand, the number of divorces is rather on the increase, but it still remains and the national level. Related to 1 000 population it is the second lowest, next to the Vysočina Region. Religion exerts its strong influence here—of all the regions the proportion of inhabitants professing religion is the greatest (55.2 %).

As in the other regions of the CR, the Zlínský Region's population grows

old, too. The dependency index defined the number of persons aged 65+ per 100 persons aged 0-14 increases over years, primarily due to the diminishing number of children. Its value has already exceeded the national average. The index of economic burden (the number of persons aged 0-14 plus the number of persons aged 65+ per 100 persons at working age) drops down moderately, because working-age persons prevail in the immigrants and the number of children decreases. The average age rises: it was 39.3 and is by 0.2 years below that in the whole of the CR.

Pre-eminence of rubber and plastic industry

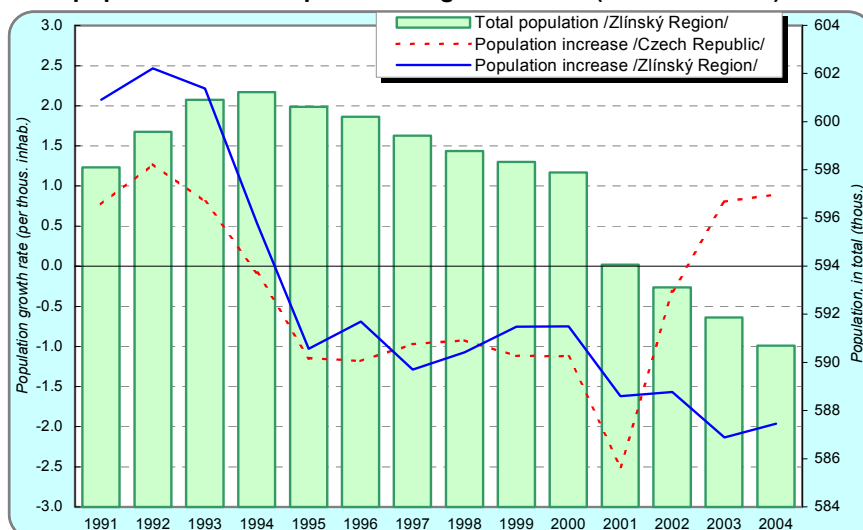
The Zlínský Region—fourth smallest and also easternmost of all the regions of the CR—developed as an agricultural region first, with the food industry to follow. The turning point in the early 20th century laid foundations for industrial development of especially many manufacturing branches—shoe making, manufacture of rubber and plastic products, engineering, metal working, aircraft manufacture, lignite mining, as well as the building of roads and, among other things, waterways (the Baťa channel). Expansion of enterprises in the town of Brno issued in the implementation of armaments production. Although there was not any heavy industry there, the Region developed at an above-average rate. The restructuring of industry, changes in the market, and political transformations such as the split of the state and the associated severance of the wide economic relations with businesses in Slovakia brought about a decline in production in a major part of the formerly flourishing industries.

Significant employers: by head office of enterprise, 2003

Name	Head Office	Activity	No. of workers
Barum Continental, s.r.o.	Otrokovice	Manufacture of rubber tyres and tubes	> 4 000
CE Wood, a.s.	Zlín	Forestry and logging	> 3 000
Baťa, a.s.	Zlín	Retail trade	> 1 500
Baťova krajská nemocnice Zlín	Zlín	Health care	> 1 500
Česká zbrojovka, a.s.	Uherský Brod	Manufacture of small arms and ammunition	> 1 500
On Semiconductor Czech Republic, a.s.	Rožnov p. Radh.	Manufacture of chemical products	> 1 500
TON, a.s.	Bystrice p. Host.	Manufacture of furniture	> 1 500
DEZA, a.s.	Val. Meziříčí	Manufacture of chemical products	> 1 000
LET, a.s.	Kunovice	Manufacture of aircrafts	> 1 000
Tajmac - ZPS, a.s.	Zlín	Manufacture of machine tools	> 1 000

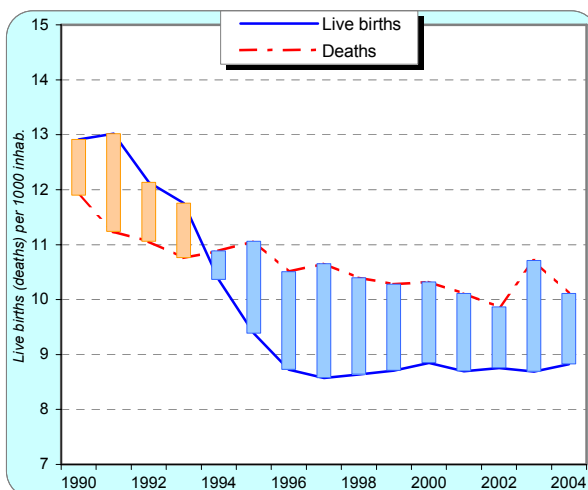


Total population - development in region and CR (31 Decemeber)

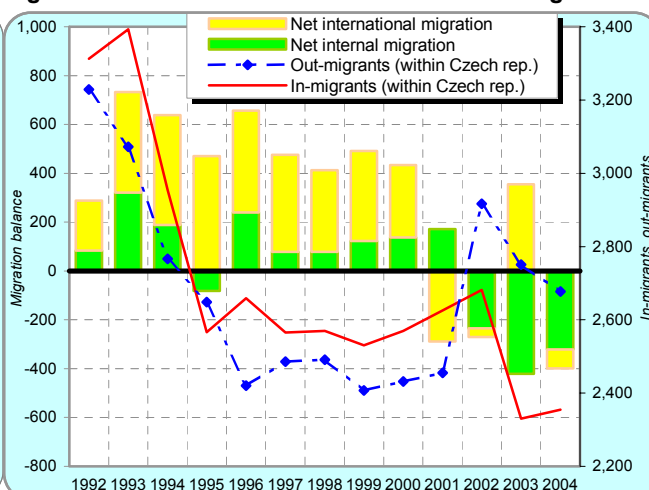


Data since 2001 reflect the Housing and Population Census (1.3.2001) results and also include foreigners who were granted long-term stays (i.e. foreigners with visas over 90 days). Population decrease 2001 was influenced mainly by Census (1.3.2001), which found out lower population than that registered 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



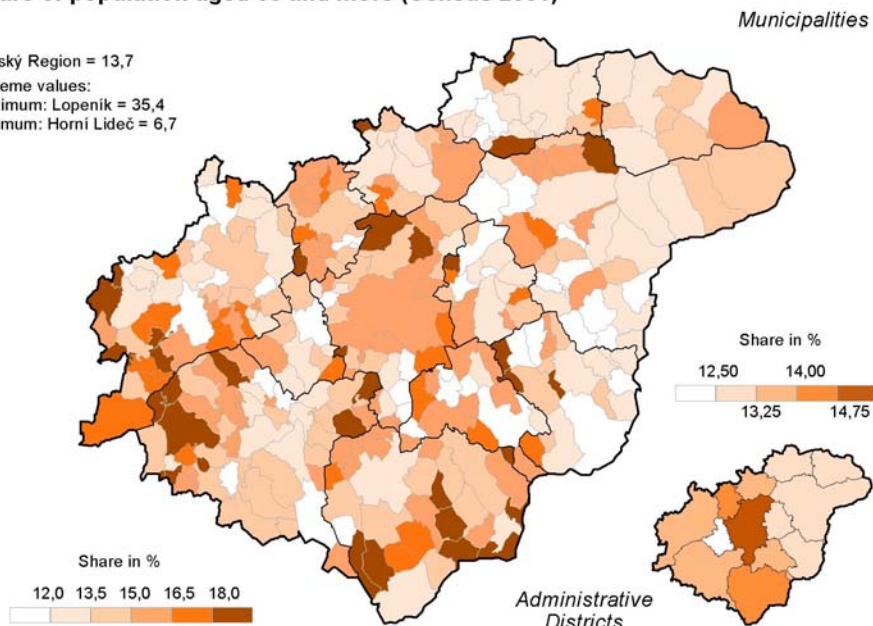
Migration balance - internal and international migration



Since 2001, foreigners who were granted long-term stays are calculated as migran

Share of population aged 65 and more (Census 2001)

Zlínský Region = 13,7
Extreme values:
Maximum: Lopeník = 35,4
Minimum: Horní Lideč = 6,7





Agriculture: 1993 - 2003

Indicator	1993	2003
Agricultural land (ha)	196,247	195,836
Arable land (ha)	130,209	126,317
Persons employed in agriculture, hunting and forestry (thous., LFS)	17.4	6.8
Yields of cereals (tonnes/ha)	4.55	4.33
Cattle stock, total (1 March)	110,953	64,449

Health care

Indicator	Region	CR
No. of physicians per 1000 population	3.2	3.9
No. of beds in hospitals per 1000 population	5.6	6.5
Infant mortality (average for 1999-2003, ‰)	3.3	4.2

This development of the regional economy then resulted in the fact that the Region occurred among falling-behind regions with low economic performance.

Comprehensive evaluation using main macroeconomic indicators placed the Region as low as eleventh among the regions. The Region accounts for not quite 5% of national GDP, which is the sixth smallest regional share. Manufacturing contributes to regional GDP by 39%, trade by 13% and real estate, renting, business services and research and development by 10%. The share of construction is above average. GDP per inhabitant only reaches 82% of the national average or 52% of the EU-15 average and this ranks the Region tenth in the CR.

The share of gross fixed capital formation per inhabitant is one of the smallest (75% of the average, 12th placing). Investments in manufacturing and construction are main contributors. The investment shares of these industries exceeded their national averages, while the share of investments in transport stood only at half the national average.

University students are needed

The network of pre-school and school facilities in the Region is stabilized. More than 300 nursery schools, more than 230 basic schools, 14 grammar schools, more than 50 secondary technical schools, more than 30 secondary vocational schools, and 11 higher professional schools in the Region provide

sufficient conditions for placing children and young people in schools. There are two institutions of higher education in the Region: the school of the non-university type in *Uherské Hradiště* and the University of Tomáš Baťa in Zlín which has a public status and 3 faculties. To increase the number of students, at the University of Tomáš Baťa in particular, would be an important step for improving the labour market. This would create a condition for reducing the number of secondary school graduates leaving the Region to study further elsewhere where they mostly find jobs, too.

The educational attainment structure is worse than that of the CR as a whole. At the time of the last census, 25.2% of the population over 15 had basic (incl. Unfinished) education (compared to 23.5% in the CR), 39.0% had secondary education without GCSE (the CR 38.0%), 27.3% had secondary education with GCSE (the CR 28.4%), and university graduates accounted for 7.7% of the adult population (the CR 8.9%). Also the index of education, which is the population with full secondary and uni-

Pupils and students: school year 2003/2004

Type of school	Thous.
Nursery schools	16.7
Basic schools	57.6
Grammar schools	7.6
Secondary technical schools	12.7
Secondary vocational schools	12.6
Higher professional schools	1.2
Universities	4.0

versity education related to 100 inhabitants over 25, was lower in the Region (42.8) than in the whole of the country (45.3). According to the index level, territorial differences in education were relatively small compared to the country's region, though the index values ranged from 49.8 in the administrative territory of Zlín to 34.2 in the administrative territory of *Valašské Klobouky*. Only one administrative territory also reached at least the national average—*Valašské Meziříčí*—all the other territories were below the average.

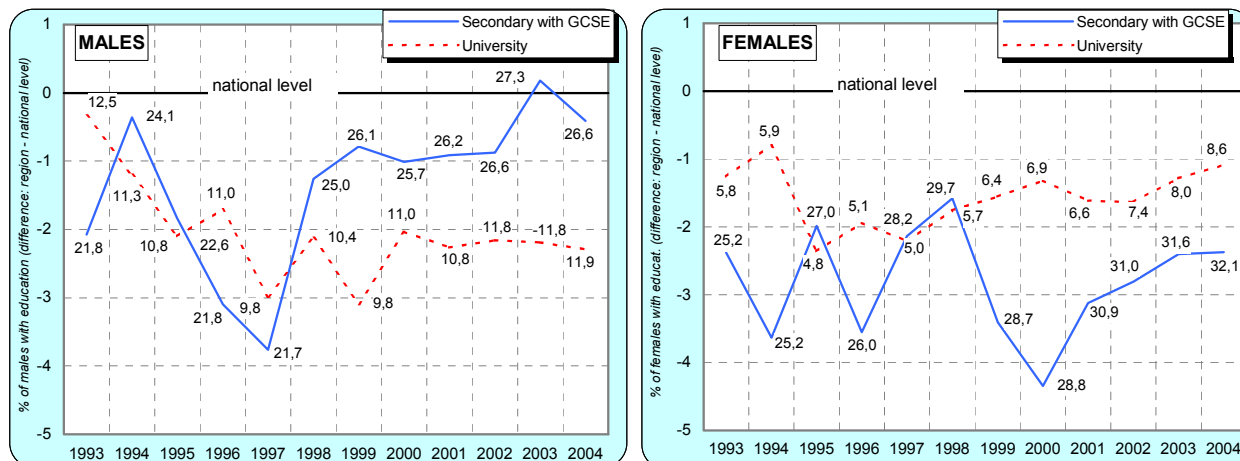
Non-uniform layout of health and social care establishments

The Region's level of social care is considerably affected by the health and social care services provided to the population. The network of health establishments comprises 10 hospitals (with more than 3 thousand beds), 14 specialized therapeutic institutions, and more than a thousand independent surgeries for adults, children and adolescents, and surgeries of stomatologists and physicians-specialists. Insufficient specialized care equipment is a specific problem of the certain lower technological level of the hospitals. It thus happens frequently that the hospitalised seek assistance in the neighbouring regions (especially in the *Jihomoravský* Region). A non-uniform layout of bed facilities is another problem of the Region. The network of establishments providing social services includes establishments founded by the state in particular.

The network is supplemented step by step by non-state facilities whose founders are charitable organizations, churches and public companies. The network of establishments providing social services is also laid out non-uniformly because a number of the non-state ones are built at random on the Region's territory without any proper system approach. Figures for the year 2002 show that there were 29 retirement homes, 15 boarding houses for pensioners, 10 social care institutions for adults, and 12 social care institutions for children and

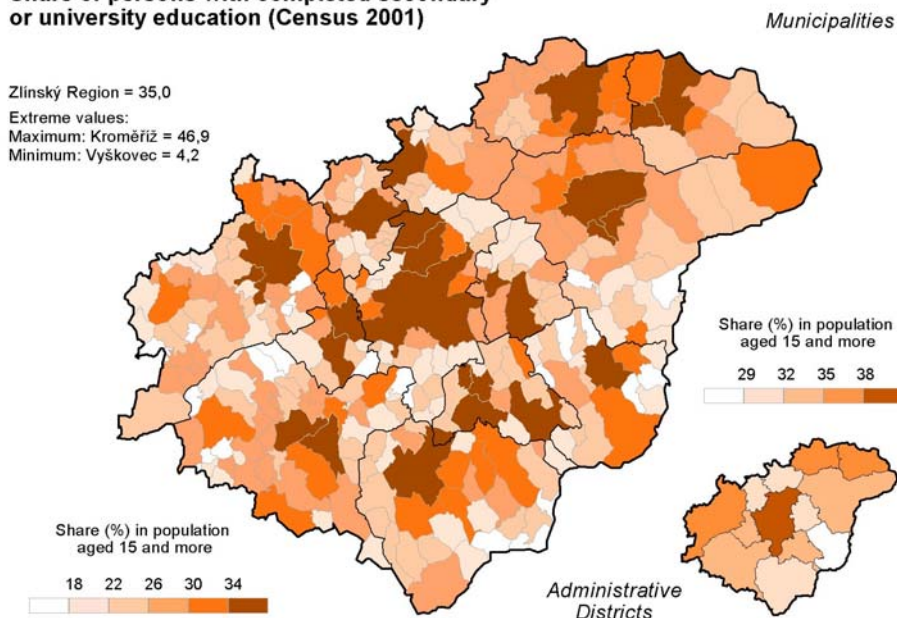


Share of males and females with secondary and university education - relation of region to the Czech Republic

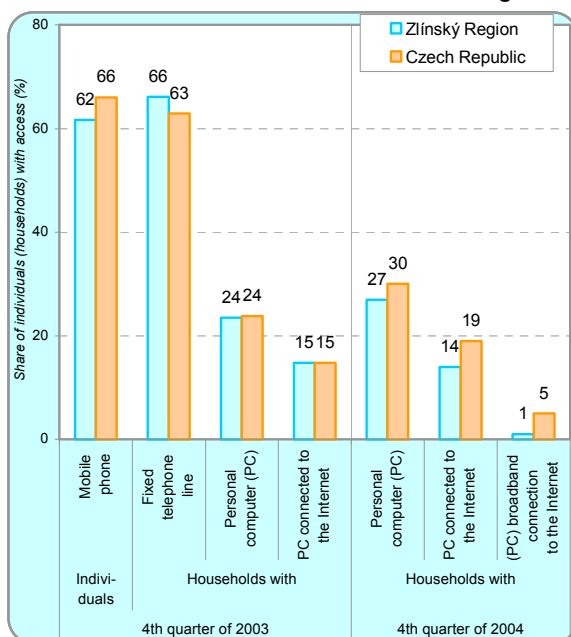


Note: Figures in graph express share of persons with secondary education with GCSE in total population aged 15+ in region, or share of persons with university education in total population aged 25+ in region

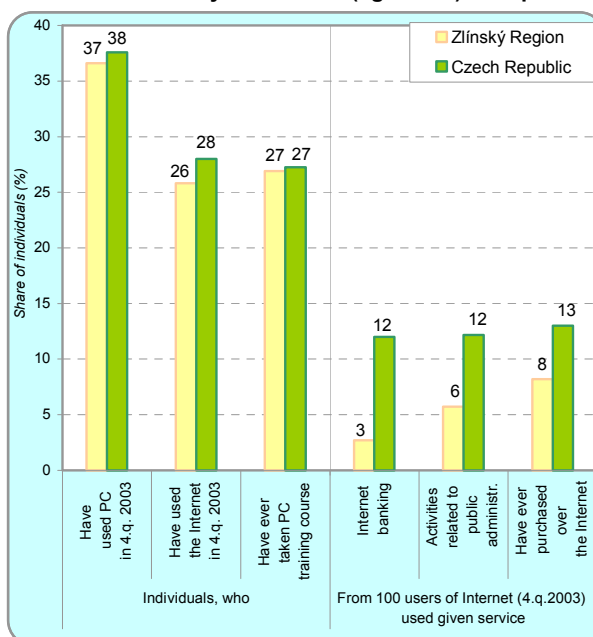
Share of persons with completed secondary or university education (Census 2001)



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	60.8	58.0	71.1	67.0	51.4	49.7
15 - 19	31.8	6.9	37.3	6.7	26.1	7.0
20 - 24	70.7	60.9	87.2	69.1	53.2	52.4
25 - 29	81.0	81.7	94.7	95.6	66.5	67.4
30 - 34	92.2	85.9	97.5	97.8	86.5	73.2
35 - 39	92.9	94.9	96.5	96.5	89.2	93.2
40 - 44	93.6	92.0	96.0	93.0	91.2	90.9
45 - 49	93.4	92.8	92.9	95.3	93.8	90.3
50 - 54	84.1	83.8	93.2	84.9	75.5	82.7
55 - 59	45.8	55.5	71.0	78.4	23.9	34.2
60 - 64	14.6	16.2	20.8	20.6	9.6	12.4
65+	4.9	3.1	8.8	5.8	2.6	.

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

Degree of education	Total		Men		Women	
	1993	2003	1993	2003	1993	2003
Basic and no education	29.4	17.5	32.8	20.7	28.1	16.0
Secondary without GCSE	72.9	69.6	78.9	75.8	63.6	61.0
Secondary with GCSE	72.2	67.9	77.0	72.5	68.4	64.2
University	86.1	80.7	87.0	83.4	84.6	77.1

adolescents in the *Zlínský* region. The number of state social care support benefits decreased in several recent years mainly in response to the abolishment of certain benefits and making conditions for granting the benefits more stringent.

Living business traditions, a weak tertiary sector

The proportion of the economically active persons in the *Zlínský* Region's population is the third smallest of the CR's regions. Approaching the end of the ranking is also the proportion of the economically active in the working-age (15-59) population, the proportion of seniors in the economically active, and the participation rate of both young and preretirement-age citizens. The proportion of women in the economically active is average. The development of the proportion of the economically active in the working-age population shows that the proportion is gradually departing from the national average as a negative deviation. The same applies to the proportion of women in the total economically active population; in relation to the country's average the proportion is steadily becoming smaller in the course of time and its negative deviation is growing.

Employment in the primary sector dropped to a half over 10 years and is one of the lowest in comparison with the other regions.

The proportion of the employed in the industry ranks the Region second in the country; the proportion was dropping moderately in the last decade. Interregionally, some branches of manufacturing dominate by their proportion of employed people: e.g. manufacture of footwear, rubber and plastic products, basic metals and fabricated metal products; manufacture of machinery and equipment is not negligible, either.

Employment in the tertiary sphere has been edging up for 10 years already. But still, its current level ranks the Region in one of the last places. The proportion of the employed in services of mostly public nature (education, health, social care, etc.) is very small, and market services do not do well in this respect, either. While the sector of progressive services (R&D, real estate, etc.) grew slowly, the level of employment achieved there is still below average values.

The proportion of the self-employed without employees exceeds the average, and that of the self-employed with employees exceeds the average even more. The Re-

gion has the largest proportion of the self-employed up to the age of 35, and the educational level of persons in self-employment above the average.

From concentrated to diversified production base

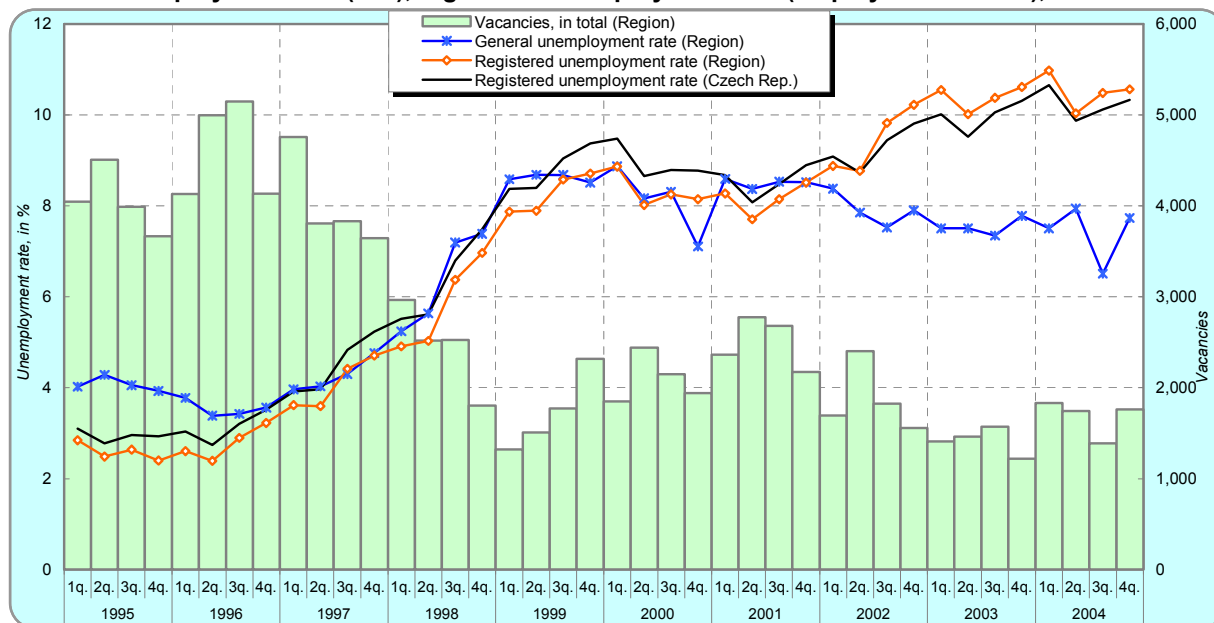
The economic development, labour market and unemployment of the *Zlínský* Region have been affected by an array of factors recently. The factors include, *inter alia*, a drop in the employment in the primary sector tied in to the transformation of agriculture and nationwide trends, a drop in employment in the industry due to a decline in a number of key industries (such as shoe making, manufacture of machinery, manufacture of aircraft, armaments production, rubber and plastic industry, manufacture of electrical and optical equipment, etc.), and also low employment in the tertiary sector.

The registered unemployment rate of the *Zlínský* Region is a little higher than the average unemployment in the whole country. The unemployment does not differ from the average very much in the middle parts of the Region; districts with unemployment exceeding the average by more than a half are found most frequently at the eastern border of the Region with Slovakia, and several of them are scattered in the Region's western part close to the border with the *Olomoucký* and *Jihomoravský* Regions.

The absolute number of unemployed job applicants has risen by a third since the year 2000, which is almost twice the growth rate compared to the average. The number of job applicants per vacancy increased markedly, twice, and the growth rate also doubled in comparison with the average. Of all the regions the proportion of applicants under retraining in all unemployed job applicants was the highest. The growth rate of registered unemployment was more than twice faster in comparison with average. The number of unemployed job applicants older than 50 is the second to third highest among

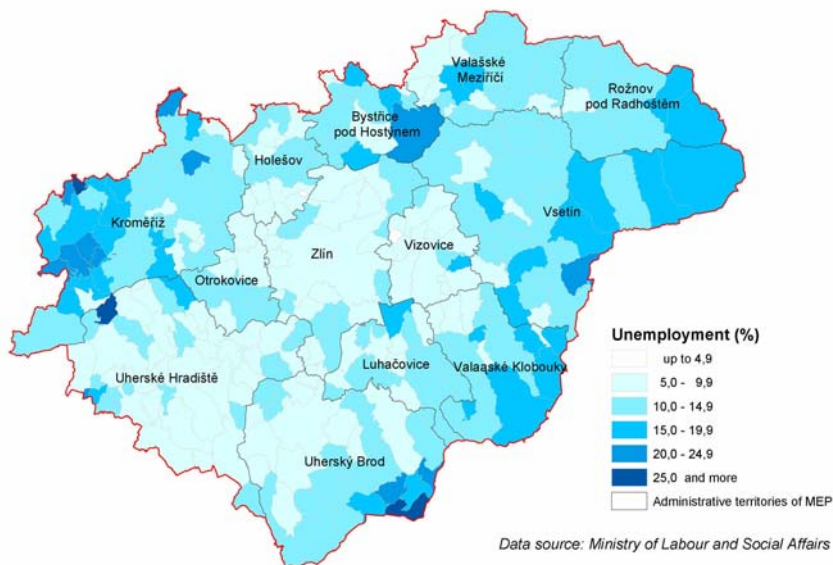


General unemployment rate (ILO), registered unemployment rate (employment offices), vacancies



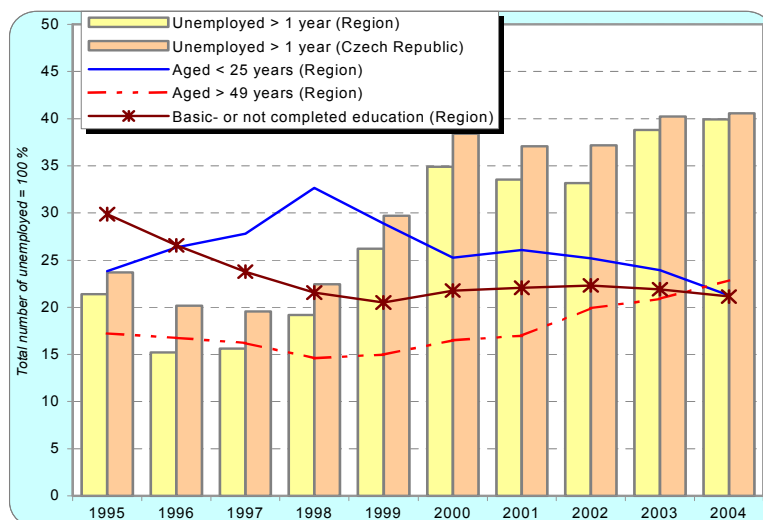
Note: Registered unemployment rate refers to the end of respective quarter

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	12,979	100.4	20,357	103.8
	Compensation of employees	33,339	90.2	50,951	82.7
	Property income	3,800	89.3	4,141	85.9
Uses	Property income	1,350	93.7	1,367	97.2
	Balance of primary income, net	48,768	92.5	74,082	87.5
Secondary distribution of income account of households					
Resources	Social benefits other than social benefits in kind	9,151	98.6	18,406	101.1
	Other current transfers	2,954	96.3	4,441	93.4
Uses	Current taxes on income, wealth, etc.	3,700	89.0	5,694	85.3
	Social contributions	11,424	89.8	18,569	83.9
	Other current transfers	2,089	96.8	4,643	96.3
	Disposable income, net	43,661	94.8	68,022	91.9

the regions; it is thus more difficult to get a new job for these workers than in most of the other regions of the country.

Low earnings of experts

Disposable income per inhabitant living in the Region is almost 95% of the national average. According to this indicator, the Region has been steadily occupying the eighth place for several years. The average monthly wage of CZK 15 111 (around € 480) has been the tenth in the ranking of the regions for several years, too, but it falls more and more behind the national level in the course of time. Work of senior officials and managers is not appreciated very much in the Zlínský Region—their wages are more than 20% down on the national average. Only wages of service workers and shop and market sales workers are above this average. A drop in relative wages with a rising level of education is observed. As the age increases, the relation of wages to the nationwide wage average in a given age group clearly decreases especially in middle-aged workers and then it remains practically unchanged in older age groups. The ratio of earnings of non-manual and manual workers is fairly low in com-

parison with the other regions (the eleventh), as is the wage ratio of females and males (the third lowest).

The proportion of social incomes in gross incomes exceeds a quarter, being above the average similarly to all the other Moravian regions. Only one household in six reports that it gets by with its income easily.

From monuments of Great Moravia, Comenius to Tomáš Baťa's ideas

The Zlínský Region covers three ethnographic areas—*Valašsko*, *Haná* and *Slovácko*—with still apparent, mutually and from the surroundings differing nature of the population, folklore, dialect, and vernacular architecture. The Region's number of inhabitants and especially the size rank it to small regions. The proportion of arable land in total area is one of the smallest (less than a third), but forestland accounts for almost 40%, which is the third largest in the country. A large part of the Region enjoys good climatic and soil conditions, which is why even demanding crops such as cereals, sugar beet, vegetables and fruit flourish here. In the south of the Region, there is an area suitable for the production of grapes and quality wine. Agriculture and

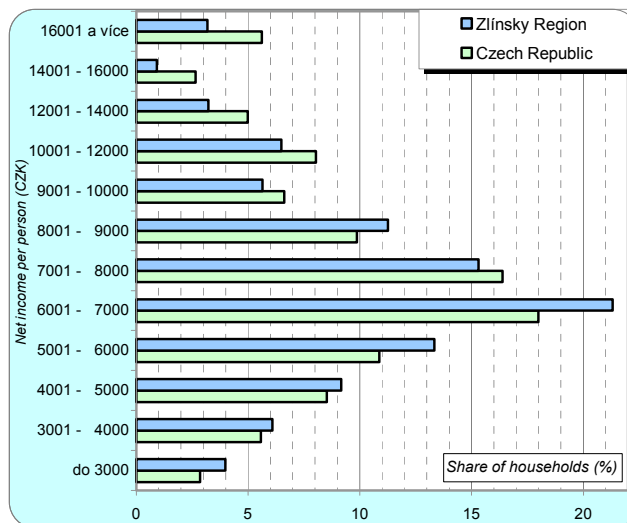
forestry produce 4% of gross value added, the trend tending to decrease, and provide jobs for the same percentage of the population. Logging is below the national average, and the level of afforestation or reforestation is very low.

Restructuring of the industry led virtually to a decline of all key industries flourishing before—from shoe-making, rubber industry, engineering, manufacture of aircraft and aircraft parts accessories, to armament industry. In the wake of this, the economic prosperity of the Region decreased heavily. *Tomáš Baťa*, the internationally outstanding businessman who laid foundations for transformation of a small, insignificant townlet into the current regional metropolis with almost 100 000 population, affected the thinking of the population to such an extent that the spirit of enterprise in the Region is one of the highest of all the regions despite the unfavourable conditions that exist there. As measured by the proportion in employment, the current major industries of the Region comprise manufacture of rubber and plastic products and manufacture of fabricated metal products, machinery and equipment (including electrical). The export performance of the Region is not very high, but commodities important for national exports can be found here too. Three thirds of exported explosives and pyrotechnical products, five sixth of tyres and almost half of footwear, prefabricated buildings and weapons and ammunition come from the Zlínský Region. The Region's share in exports of certain food products, plastic foils and products is not negligible, either.

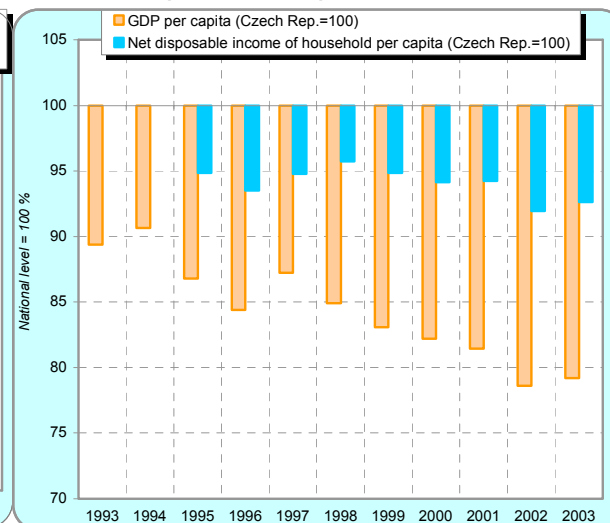
There are many tourist-attractive sights in the Region, including those dating back to the Great Moravian Empire: medieval castles, churches and other ecclesiastical buildings, rural buildings, open-air folk museums of vernacular architecture, and modern buildings and structures such as functionalistic edifices and also the *Baťa* channel. Well-known health resorts, the birthplace of J. A Comenius and



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

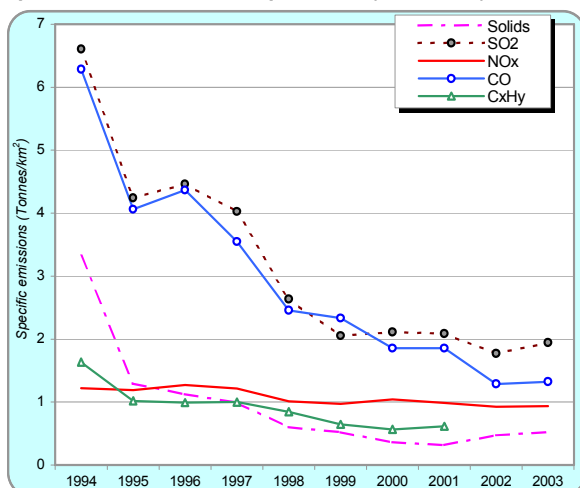


Gross domestic product and disposable income

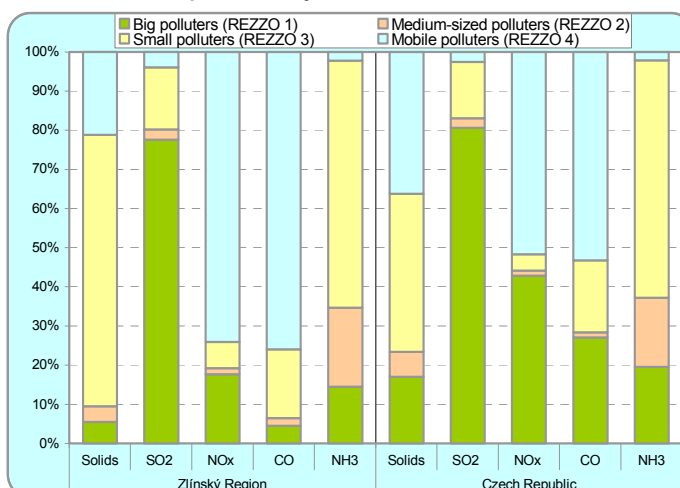


Note: Data on disposable income are available since 1995

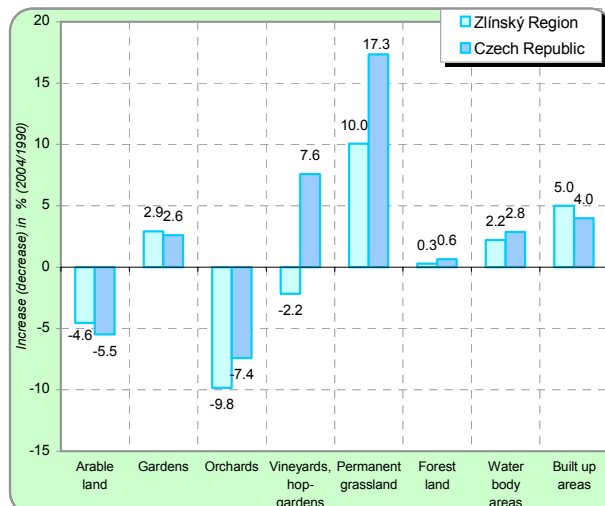
Specific emissions of main pollutants (REZZO 1-3)



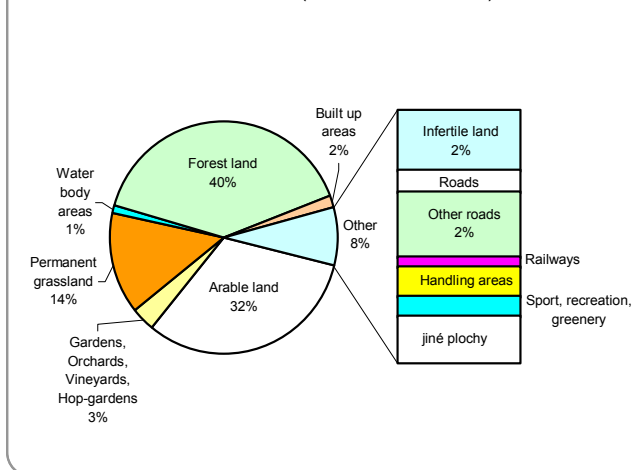
Structure of main pollutants by sources in 2003



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	498,449	514,594
From the CR	414,714	439,636
From abroad	83,735	74,958
Number of overnight stays	2,093,480	1,988,511
CR nationals	1,764,431	1,698,439
Foreign nationals	329,049	290,072
Average length of stay (days)	5.2	4.9

areas for all-year recreation and hiking in a little disturbed environment are found in the Region, too. These advantages were not fully recognized by tourism, though, as accommodation capacities are small and also a small number of guests spent nights there. Both of these indicators can be found in the bottom quarter of the ranking of the regions.

Sparse road and railway networks

The Zlínský Region is specific to some extent as far as its transport is concerned. It has no motorways or speedways. Long-distance roads of the European system are sporadic, do not pass through the heart of the Region and can only be found at the outskirts more than 30 km away from the centre. They are the European road *Liberec – Hradec Králové – Olomouc – Žilina* about 5 km from the northern border and the European road *Brno – Trenčín* 10 km from the southern border. Both of them are off-centre routes running east-west. This unpropitious situation should be rectified by the already commenced construction of the speedway (a branch road from the motorway D1) to *Zlín* and its possible extension further to the east. For the time being, the main transport routes are the road *Opava – Valašské Meziříčí – Vsetín – Brumov/Bylnice* and the key north-south route *Olomouc – Otrokovice – Uherské Hradiště – Hodonín – Břeclav – Poštorná* (border crossing).

The road network 2 100 km in length is one of the shortest and accounts for 4% of the national road network. Its density is the smallest of all the regions except for Prague (a quarter down on the average). Relative road lengths per thou-

sand inhabitants or per motor vehicle are the second shortest. The level of motorization is not high—second to third lowest; e.g. 300 passenger cars per thousand inhabitants is the value one sixth down on the CR's average. The relative rate of accidents has been very low for a long time—about three quarters of the average level—and tends to fall further. The percentage of accidents under the influence of alcohol is relatively high.

The railway network is the shortest of all the regions except for Prague; its density is the lowest whatsoever—30% below the country's average.

Although it existed in the Region in the first half of the 20th century, river transport was not pursued for a number of years. Recently, however, the reconstructed *Baťa* channel was put in use for boat trips.

Foreign guests decrease in number

The Zlínský Region offers its visitors many places for recreation and seeing. The largest Moravian spa is found at *Luhačovice*, a smaller spa is also at *Kostelec u Zlína*. There is a large number of sights in the Region, e.g. *Buchlov Castle*, *Buchlovice Castle*, *Velehrad* pilgrimage place, *Svatý Hostýn* pilgrimage hill, etc. *Kroměříž Castle* with its garden—monument on the UNESCO List of World Cultural Heritage—is of outstanding significance. The monument with the highest tourist attendance in the Region is *Wallachian Open Air Museum in Rožnov pod Radhoštěm*.

Beskydy (the Beskids), *Hostýnské vrchy* (Hills), *Vsetínské vrchy* (Hills), and *Vizovické vrchy* (Hills) offer good conditions for hiking. The White Car-

pathians, a protected landscape area, belongs to the six biospheric preserves of UNESCO in the CR.

The worldwide decrease in tourism resulting from the terrorist attacks in the USA in 2001 affected the Zlínský Region, too. About one of seven tourists accommodated in the Region is a foreigner. The number of foreign guests has been diminishing recently. In the year 2003 the number was half of that for the year 2000. Most foreign visitors come from Slovakia, tourists from Germany are decreasing in number markedly, and a downward trend is also recorded for guests from Poland. The average length of stay in the Region has been diminishing with time to current figure—5 days.

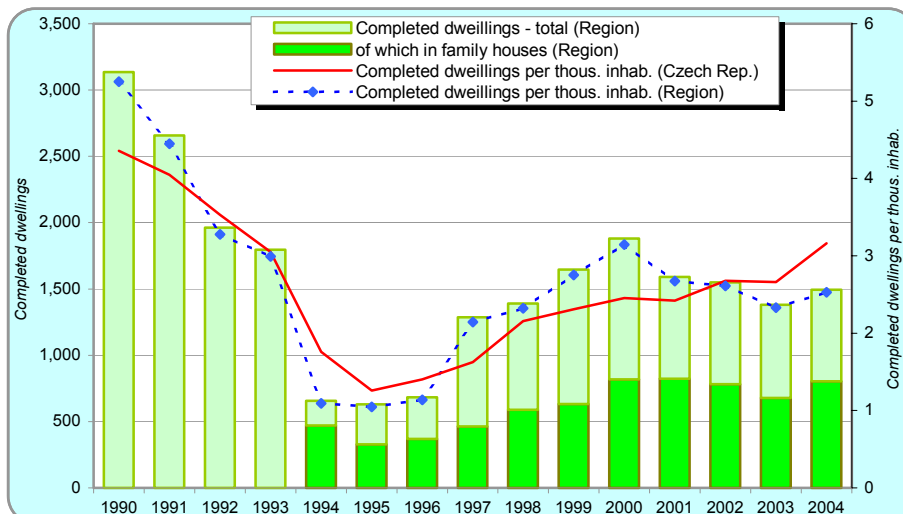
Considerable prevalence of family houses

The last census established that that there had been more than 130 thousand houses in the Zlínský Region in 2001, of which 14.1% were unoccupied. Compared to 1991, the number of unoccupied houses was by 20.7% up and was rising at a slower rate than in the whole of CR. In the long run, the Region is an area with a large proportion of family houses. According to the last census, their proportion in permanently occupied houses was 92.5% (86.3% in the CR). The Region's dwelling stock in 2001 included more than 230 thousand dwellings. The increase in permanently occupied dwellings between 1991 and 2000 equalled 4.4% (3.3% in the CR).

The housing construction underwent a decline in the 1990s, but no noticeable revival has been observed so far. The number of dwellings completed has been rather on the decrease recently, and dwellings started and under construction are stagnating in number. On a nationwide scale the Zlínský Region predominates in technical amenities of its dwellings completed, especially where connections to gas supply are concerned. There are also lower acquisition costs of the construction of family houses in the Region (construction is self-help in nature to a large extent).



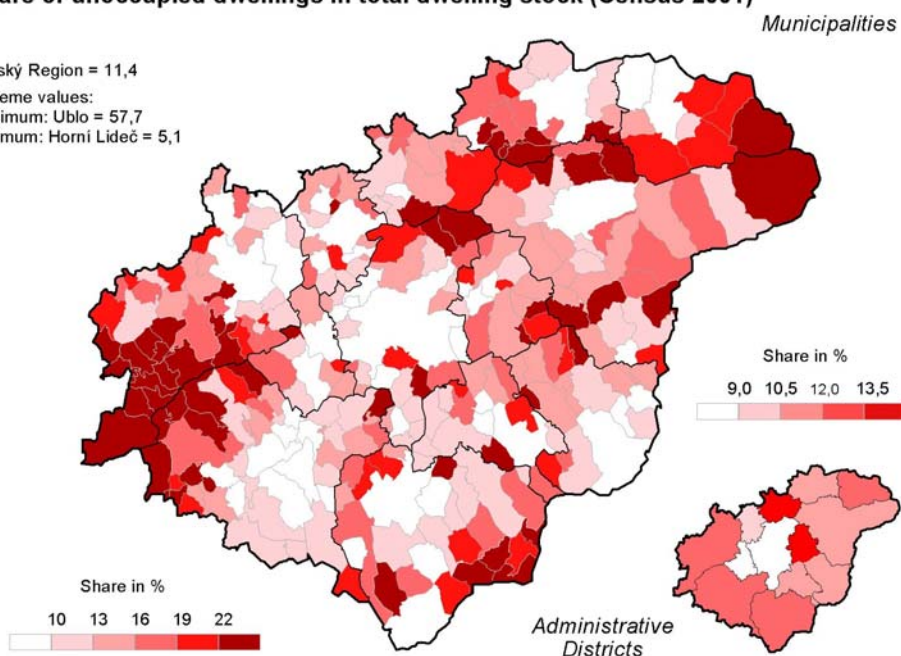
Completed dwellings - in all buildings / in family houses



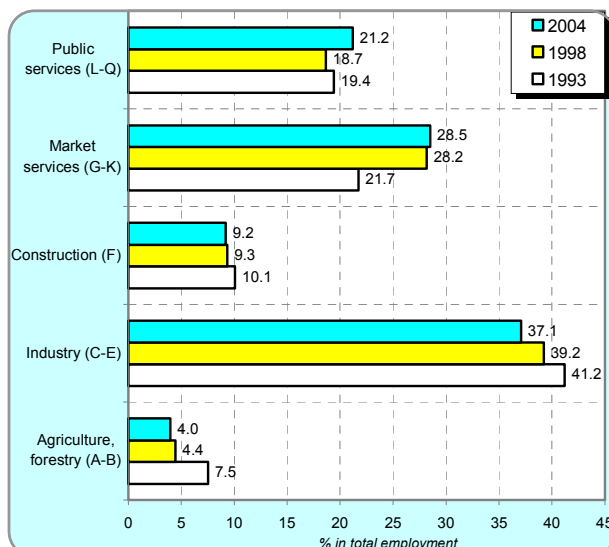
Note: data on dwellings in family houses are available since 1995

Share of unoccupied dwellings in total dwelling stock (Census 2001)

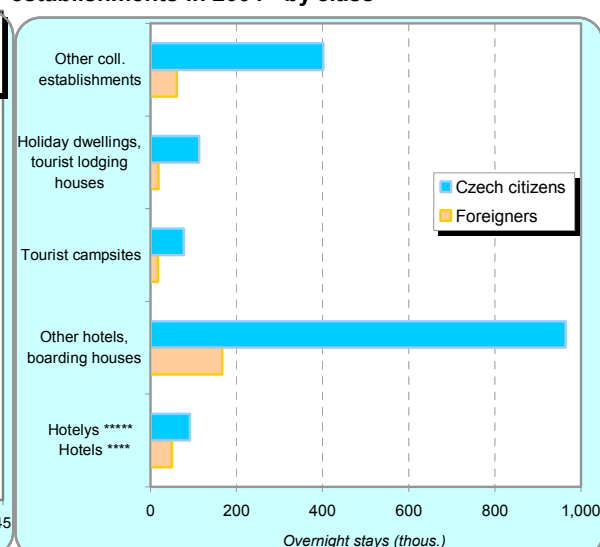
Zlínský Region = 11,4
 Extreme values:
 Maximum: Ublo = 57,7
 Minimum: Horní Lideč = 5,1



Employment in major sectors (groups of NACE)

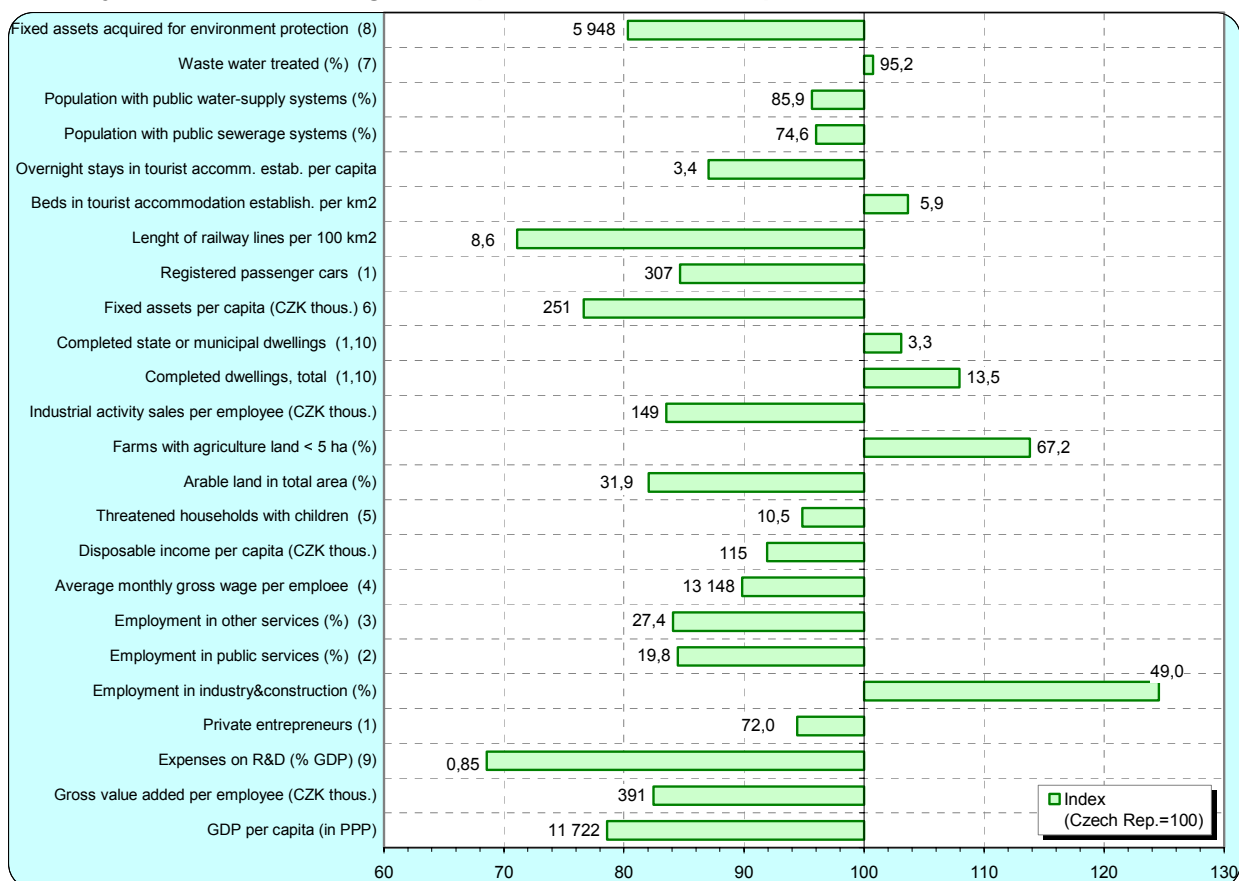


Overnight stays in collective tourist accommodation establishments in 2004 - by class





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

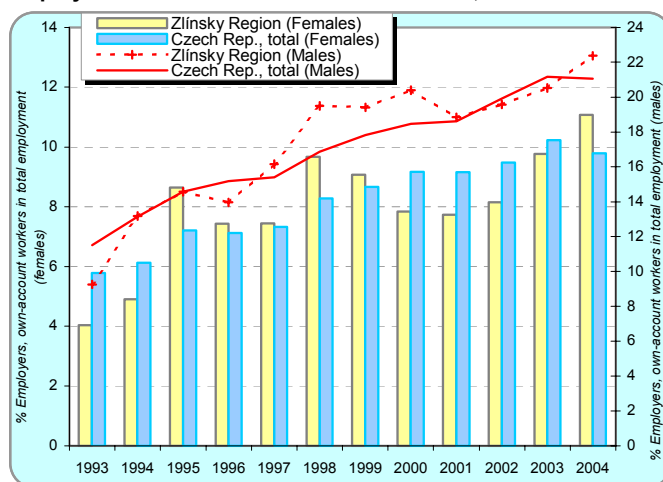
⁷⁾ Related to total waste water discharged into public sewerage systems (=100%)

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

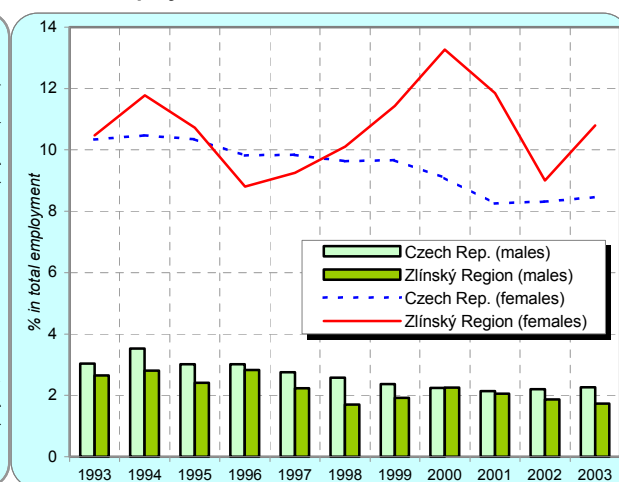
⁹⁾ Average for period 2001-2003

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 (Zlínský)	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	149.7	129.4	126.2	100.8	120.3	116.6
		Rank	x	5 / 14	16 / 41	23 / 117	580 / 1105	598 / 1208
2	Total population increase (1995-2002) ³	Value	-1.8	-1.8	-4.0	-1.4	2.7	2.0
		Rank	x	10 / 14	23 / 40	67 / 117	794 / 1078	851 / 1181
3	Natural population increase (1995-2001) ³	Value	-1.7	-2.0	-0.9	-0.7	0.9	0.6
		Rank	x	10 / 14	24 / 40	72 / 111	738 / 1078	800 / 1175
4	Mgrration population increase (1995-2001) ^{3,4}	Value	-0.1	0.1	-1.6	-0.7	1.9	1.4
		Rank	x	8 / 14	18 / 40	46 / 111	737 / 1078	775 / 1175
5	GDP per capita (2002), in Purchasing Power Parity	Value	11,253	14,315	10,912	10,966	23,164	21,172
		Rank	x	12 / 14	31 / 40	41 / 121	1078 / 1101	1107 / 1208
6	GDP per capita (1995), in Purchasing Power Parity	Value	9,254	10,660	7,882	7,118	16,869	15,233
		Rank	x	9 / 14	25 / 40	19 / 115	1014 / 1076	1024 / 1177
7	Share of economically active in total population (% , 2002)	Value	47.9	50.0	45.3	45.5	46.8	46.6
		Rank	x	14 / 14	32 / 41	42 / 123	443 / 986	471 / 1095
8	Sh.of economically active women in total women pop. (% , 2001)	Value	41.1	43.4	39.8	40.5	39.2	39.4
		Rank	x	14 / 14	22 / 28	56 / 114	219 / 585	261 / 685
9	Employment in agriculture, forestry and fishing (% , 2001)	Value	3.4	4.8	12.1	17.0	4.0	6.0
		Rank	x	12 / 14	35 / 40	100 / 113	616 / 1063	704 / 1162
10	Employment in industry and construction (% , 2001)	Value	50.8	40.1	36.2	30.5	25.9	26.6
		Rank	x	2 / 14	2 / 40	4 / 113	11 / 1063	13 / 1162
11	Employment in services (% , 2001)	Value	45.8	55.2	51.8	52.5	70.1	67.3
		Rank	x	12 / 14	37 / 40	75 / 113	1028 / 1063	1091 / 1162
12	Unemployment rate, total, based LFS (% , 2003)	Value	7.6	7.8	18.0	14.5	8.1	9.1
		Rank	x	6 / 14	22 / 40	91 / 123	358 / 991	435 / 1100
13	Unemployment rate, women, based LFS (% , 2003)	Value	9.8	9.9	16.7	15.3	8.9	10.0
		Rank	x	5 / 14	13 / 28	71 / 123	171 / 591	236 / 700
14	Unemployment rate, persons up to 25 years, LFS (% , 2003)	Value	17.8	18.6	26.7	32.3	15.8	18.4
		Rank	x	6 / 14	12 / 28	81 / 123	152 / 494	227 / 603
15	Bed in hotels and similar establishments per capita (2002)	Value	20.3	24.1	15.2	10.5	26.1	23.6
		Rank	x	7 / 14	20 / 41	16 / 118	441 / 1105	450 / 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)

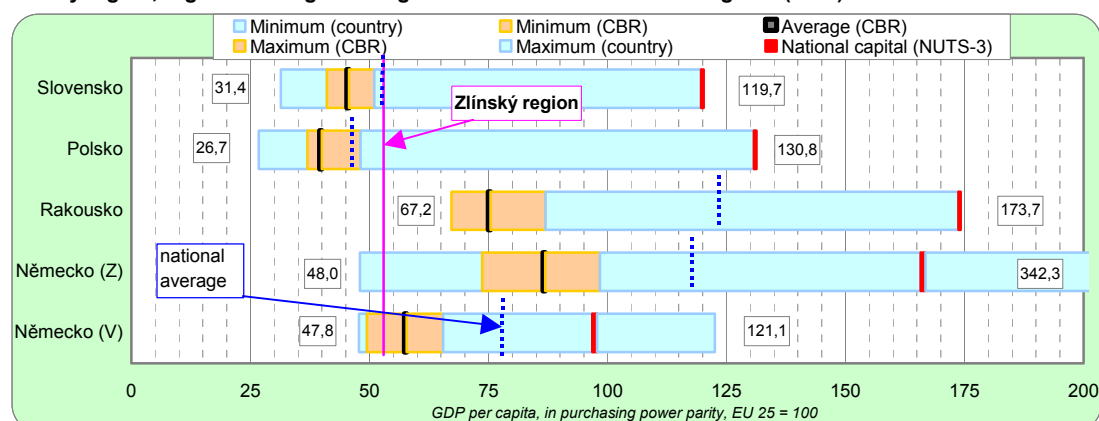
³ Expressed as an average of yearly-increases (as a difference between mid-year population)⁴ Migration increase is calculated as a difference between total increase and natural increase

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:

Zlínský region, regions in neighbouring countries and cross-border regions (CBR)¹¹ Cross-border regions include all NUTS-3 regions adjoining to the Czech Republic