

of the Bratislava Region
for years 2021 – 2027

Preface



Economic and Social Development Programme (ESDP) of the Bratislava Region is a fundamental strategic document of the region, which sets the direction and priorities of the region’s development. The document identified the key challenges within the territory of a metropolitan region and set the direction of its development for an upcoming decade.

The purpose of the document is to contribute to the fundamental modernisation of the territory of the Bratislava Region in line with the “SMART” concept of the region and to prepare the Bratislava Region well for the 21st century. The programme provides green, sustainable, inclusive and innovative solutions to structural challenges. It will also reduce the unsustainable burden of the region’s infrastructure. These intentions can be achieved exclusively on the basis of data and their correct interpretation, which will ensure the fulfilment of the set objectives, realisation of specific activities and subsequent monitoring and evaluation of progress.

It is also necessary to emphasise that in order to achieve the global aim of ESDP, this document serves not only the self-governing region, but also other actors operating in the region. In this context, it represents a fundamental framework for the preparation of other strategic documents at the regional as well as local level. Furthermore, ESDP serves as a pillar of supporting argumentation justifying obtention of financial resources for regional development, especially from the EU funds.

ESDP provides guidelines for solving structural problems and systemic challenges, as the Bratislava Region has long faced territorial problems in areas such as transport, the environment, education, research and innovation, social care, healthcare, tourism and culture.

The situation in transport can be identified as the most crucial issue. The high intensity of individual transport creates extreme pressure on the existing transport infrastructure due to the lack of financial tools for its modernisation and capacity building. As a result, the Bratislava Region has the highest share of emissions from car transport among Slovak regions. Another important challenge for the region is the removal of contaminated sites and the completion of wastewater infrastructure in order to protect drinking water supplies of

Central European importance located on Žitný ostrov. The quality-improvement of scientific and technological institutions and research institutes of national importance and the internationalisation of research also presents a challenge for the territory. At the same time, the region faces insufficient capacity of preschool and school facilities, associated with the highest demographic growth in Slovakia, and a weak connection between the theory and practice in the education system. In addition to a low availability of outpatient healthcare in the region’s territory, we also identified a modernisation debt of medical infrastructure for specialised healthcare and of the social services infrastructure. Furthermore, the remuneration of employees in the areas of social services, education or healthcare appears to be insufficient.

Elaboration of ESDP itself, despite a difficult period of unprecedented health and economic crisis, was carried out with the cooperation of hundreds of partners from the affected territory. The coordination was covered by the Regional Policy Institute of the Bratislava Region, which was established in 2020 under the Bratislava Region. In the future, the Institute will play a crucial role in coordination of the activities along with the implementation of ESDP, communication and coordination of relevant actors and, last but not least, in monitoring and evaluation of progress towards the set objectives.

In conclusion, on behalf of the strategy processing team, I would like to thank all mayors, socio-economic partners, state bodies, academia and other entities who contributed to the elaboration of this significant document with their proactive approach, comments and suggestions.

I appreciate their contribution so far, we look forward to further cooperation and we believe that by joint efforts we will achieve the objectives set in ESDP, thanks to which our region will become the best place to live in.

Juraj Droba
President of the Bratislava Region



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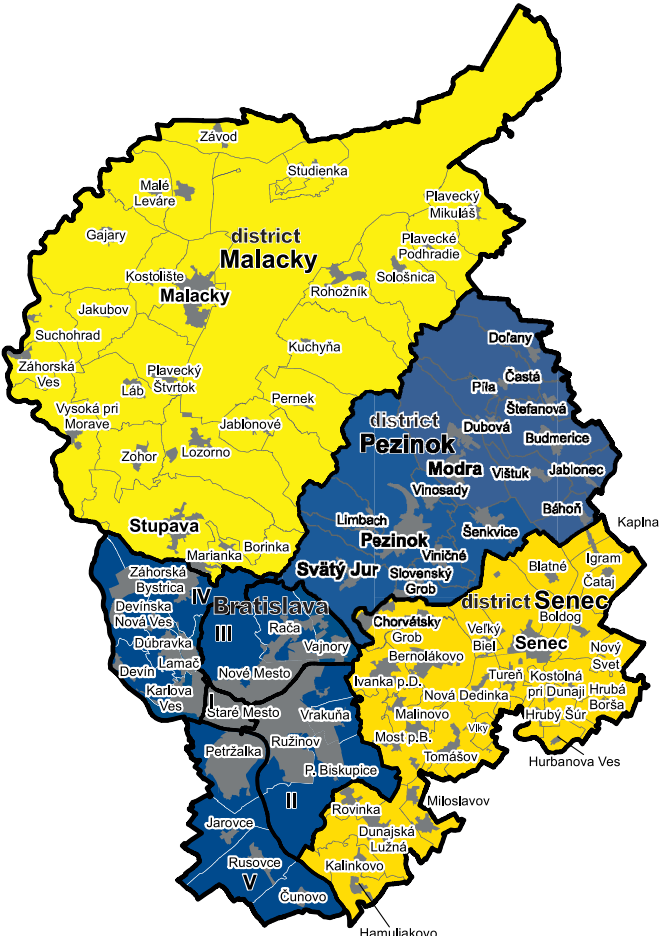
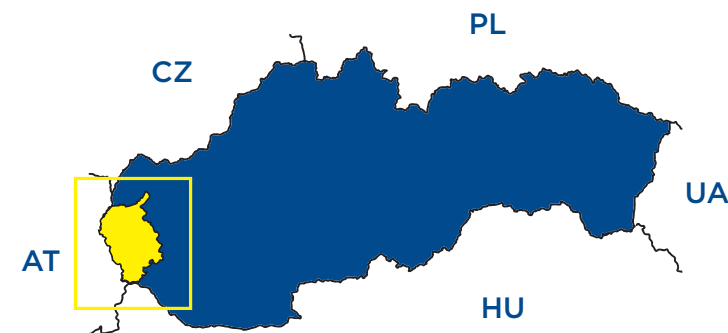
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Basic characteristics of the territory

Identification of the territory

The Bratislava Region (BR) is located in the southwestern part of the Slovak Republic (SR). Covering an **area of 2,053 km²**, the BR is the smallest Slovak region (covers only 4.2 % of the area of the SR).



Administrative division

The territory of the BR covers:










- **5** municipal districts (BA I – V) and districts Malacky, Pezinok and Senec;
- **73** municipalities, resp. **89** basic settlement units (level of LAU2);
- **17** city districts of Bratislava, the capital city of the SR
- **7** municipalities with city status (listed in descending order by population): Bratislava, Pezinok, Senec, Malacky, Modra, Stupava and Svätý Jur;
- **66** municipalities with village status.

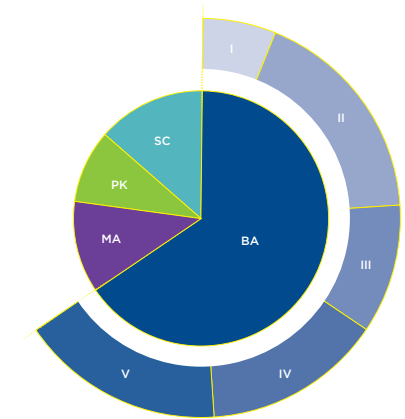
Population (as at 31st Dec. 2019)

 **669,592 inhabitants**, that is **12.3 %** inhabitants of the SR.

Share of population in BA and in districts

Percentage of the population in individual districts of the BR and in the capital city Bratislava, as at December 31, 2019, according to the Statistical Office of the SR:

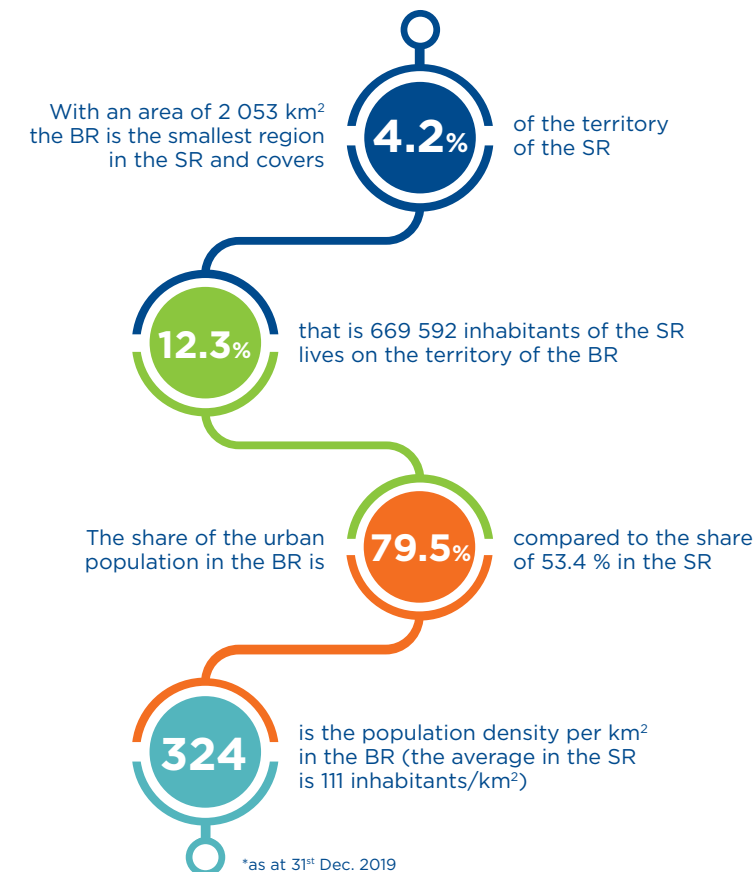
Area	share [%]	in chart
city Bratislava	65.37 %	
district Bratislava I	6.25 %	
district Bratislava II	17.35 %	
district Bratislava III	10.37 %	
district Bratislava IV	14.60 %	
district Bratislava V	16.77 %	
district Malacky	11.15 %	
district Pezinok	9.79 %	
district Senec	13.68 %	
TOTAL	100 %	



TEN-T corridors

The location in Central Europe, the "function" of the international crossroad of roads, rail, but also water and air transport, belongs together with an achieved level of economic indicators, to significant development factors of the BR.

- Baltic-Adriatic corridor: Vienna – Bratislava – Žilina
- Orient/East-Med corridor: Prague – Bratislava – Budapest
- Rhine-Danube corridor: Vienna – Bratislava – Budapest



Sustained population growth

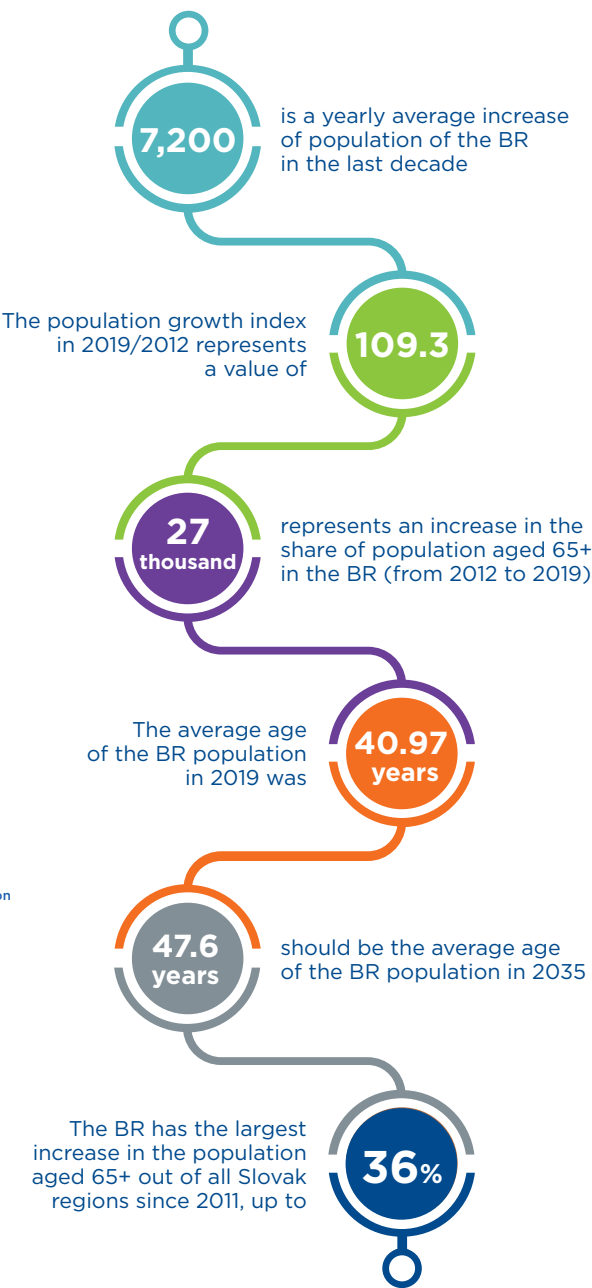
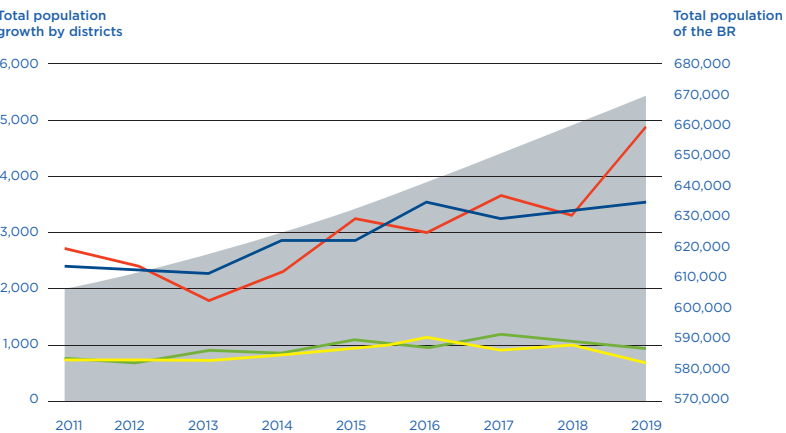
In the period after the 2011 Census, we are seeing **a steady increase in the population of the BR to 669,592 inhabitants, out of which almost 48 % were men and approximately 52 % women.** At the level of individual districts, the highest increase in the period 2012 – 2019 was achieved by the district of Senec, approximately 21.7 thousand persons.

The average annual population growth in the BR in the last decade reaches the value of 7,200 new inhabitants.

The BR has long shown positive values of population growth. Typical for the BR is a population growth by migration. Decline in the population was not recorder by any district in the BR region.

Population growth in the BR districts

District	2011	2013	2015	2017	2019
Bratislava	2,700	1,800	3,254	3,641	4,862
Senec	2,411	2,287	2,887	3,225	3,560
Pezinok	757	906	1,059	1,179	896
Malacky	738	705	921	901	676
The BR total	606,537	618,380	641,892	650,838	669,592



Aging population

The age group of 65+ is a constantly growing population group. This applies not only within territory of the BR but in the whole of Slovakia as well. In the BR the number of inhabitants in this age group increased by 36 %, what represents the highest increase within all Slovak regions.

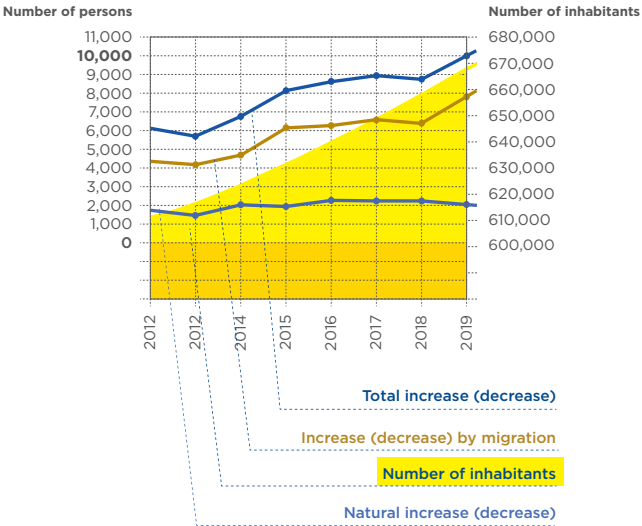
The average age of population in the BR in 2019 was 40.97. The highest average age in 2019 was reached by Bratislava I. city district. The lowest average age was recorded in Senec district.

All Bratislava districts are classified into a regressive type of population (with a predominant older component of the population). According to the official forecast, **the average age of the BR population should reach 47.6 years in 2035.** This demographic trend of aging population will take place in all districts of the BR.

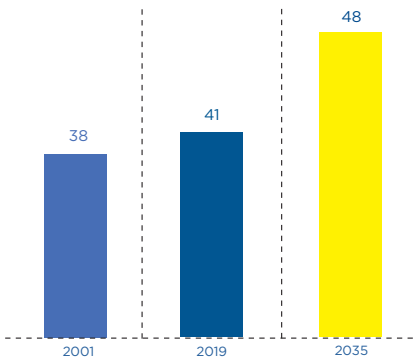
Based on official forecasts of the demographic development, we can expect a decline in the share of the population in both pre-productive and productive age and a significant increase in the oldest part of the population in the BR by 2035.

The population of the BR will reach a total of 679,269 inhabitants in 2030 and a total of 687,072 inhabitants in the horizon of the published forecast (2035), which represents an increase of 17.5 thousand inhabitants compared to 2019.

The population movement balance in the BR in the period 2012 – 2019 (according to the data of the Statistical Office of the SR)



Prognosis of an average age of inhabitants of the BR until 2035

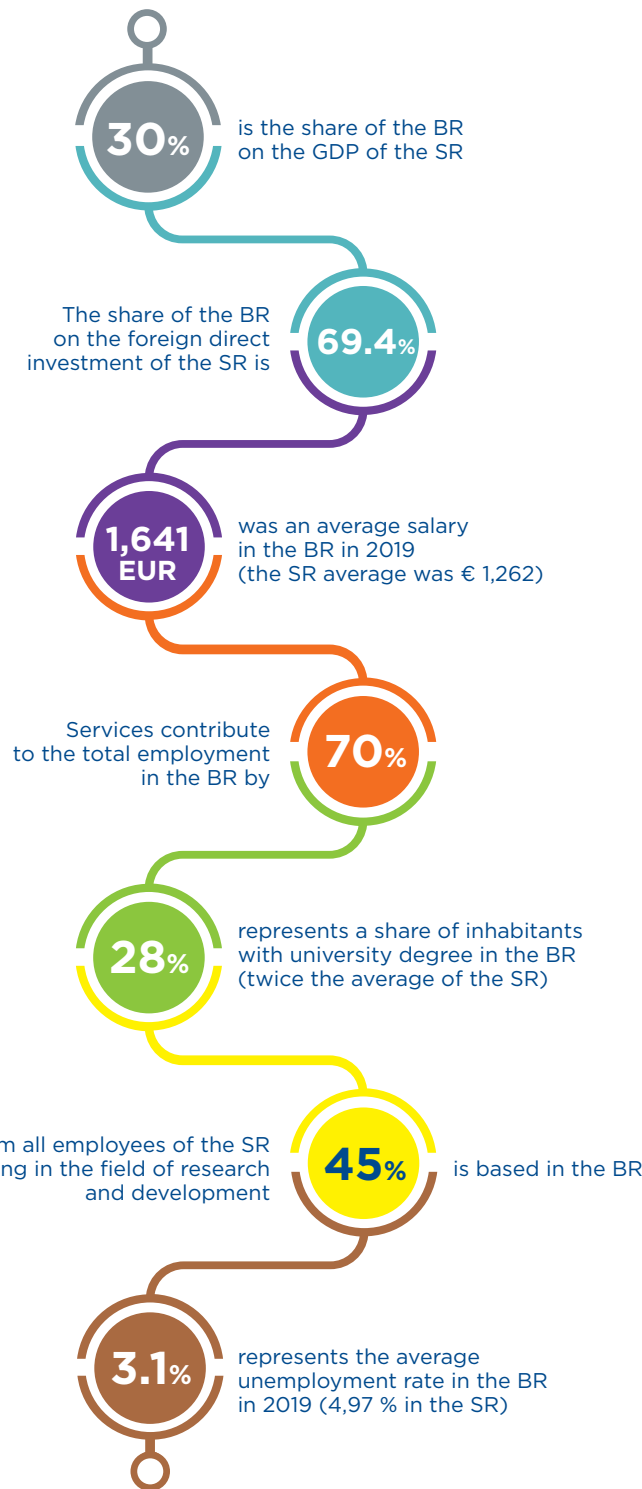
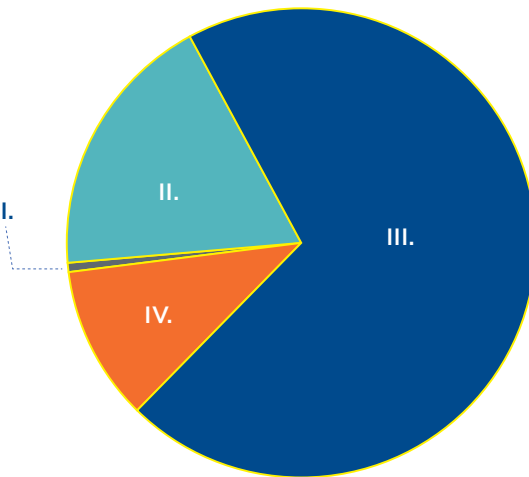


Share of individual economic sectors in total employment

In terms of registered number of employees **the position of the tertiary sector (sector of services) clearly dominates in the BR and accounts for more than 70 % of total employment.**

Share of individual economic sectors in total employment in the SR (according to the Statistical Office of the SR, 2019)

Sector	share [%]	in chart
Primary	0.63 %	■
Secondary	18.35 %	■
Tertiary	70.47 %	■
Quaternary	10.55 %	■



High GDP

From an economic point of view, the BR is one of the most productive regions in Europe. In terms of GDP per capita, the BR ranked 10th in 2018. However, **the level of region's development is not reflected in the value of GDP of the BR.**

The share of the BR in generation of the national GDP is almost 30 %.

The share of the BR in Slovakia's foreign direct investment is 69.4 %.

The average wage in the BR was €1,641 EUR in 2019. In contrast, the average wage for the whole of Slovakia was € 1,262.

Favorable educational structure

The educational structure in the BR is very favorable – **twice the share of the population with university education (28 %) compared to the national average (14 %).** The educational level of the population is significantly influenced by the city of Bratislava, where more than 63 % of the population has a high school diploma and a university degree.

Low unemployment rate

Compared to other regions, the BR has a favorable situation on the labor market. The registered unemployment rate is the third lowest.

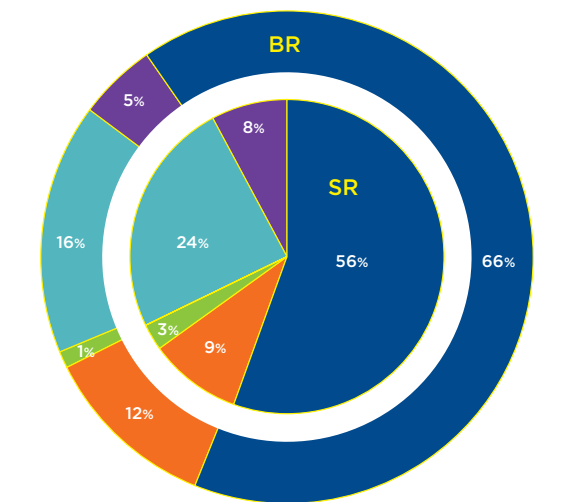
The registered unemployment rate in the BR in 2019 was 3.1 % (4.97 % in the SR).

Contribution of the sectoral structure in regional GDP

The largest share in the regional GDP within the sectoral structure of the BR is generated by the service sector with a value of up to 66 %. It is followed by the industry sector with a share of 16 % and the research and development sector with a share of 12 %. In contrast, the services account for only 56 % of the GDP at the national level.

Contribution of individual economic sectors on GDP in the SR and in the BR (according to the Statistical Office of the SR, 2019)

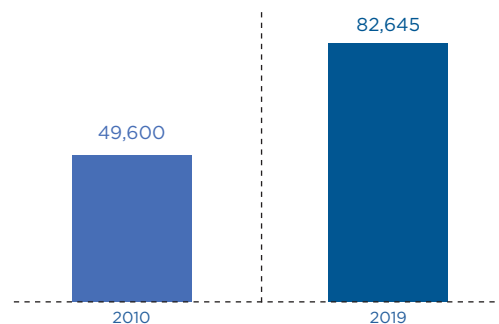
Sector [according to SK NACE]	The SR [share in %]	The BR [share in %]	in chart
Services	56%	66%	■
Science and research	9%	12%	■
Agriculture	3%	1%	■
Industry	24%	16%	■
Construction	8%	5%	■



Number of enterprises

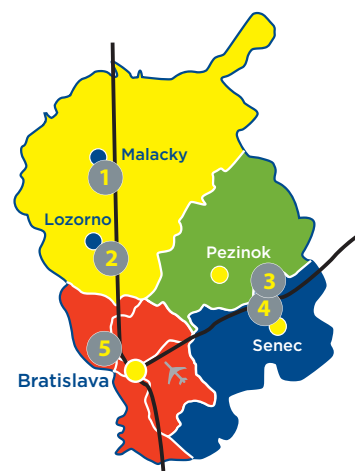
The number of enterprises in the territory of the BR increased by a total of 33,045, i.e., by 60 %, in the period from 2010 – 2019.

Number of enterprises in the territory of the BR



Industrial and logistic parks in the territory of the BR

Industrial park	Municipality
1 VGP	Malacky
2 Pointpark	Lozorno
3 Prologis	Senec
4 Karimpol	Senec
5 CTP	Bratislava



The largest exporters in the territory of the BR
(source: TREND Analyses, as of 11/2019)

Company	Industry
1 Volkswagen Slovakia, a.s.	automotive
2 Slovnaft, a.s.	chemistry
3 IKEA Components. s.r.o.	woodworking
4 Eset s.r.o.	IT
5 Golde Lozorno spol. s r.o.	automotive

The largest employers in the territory of the BR
(source: TREND Analyses, 2019)

	Name	Average number of employees	Industry
1	Volkswagen Slovakia, a.s.	14,624	automotive
2	IBM International Services Centre, s.r.o.	4,941	IT
3	Slovnaft, a.s.	3,477	chemistry
4	AT&T Global Network Services Slovakia, s.r.o.	3,347	IT
5	Asseco Central Europe, a.s.	2,907	IT
6	Dopravný podnik Bratislava, a.s.	2,707	transport
7	Dell, s.r.o.	1,978	IT
8	IKEA Industry Slovakia, s.r.o.	1,817	woodwork

Note: data provided by companies, supplemented by data from the Register of Financial Statements of the SR



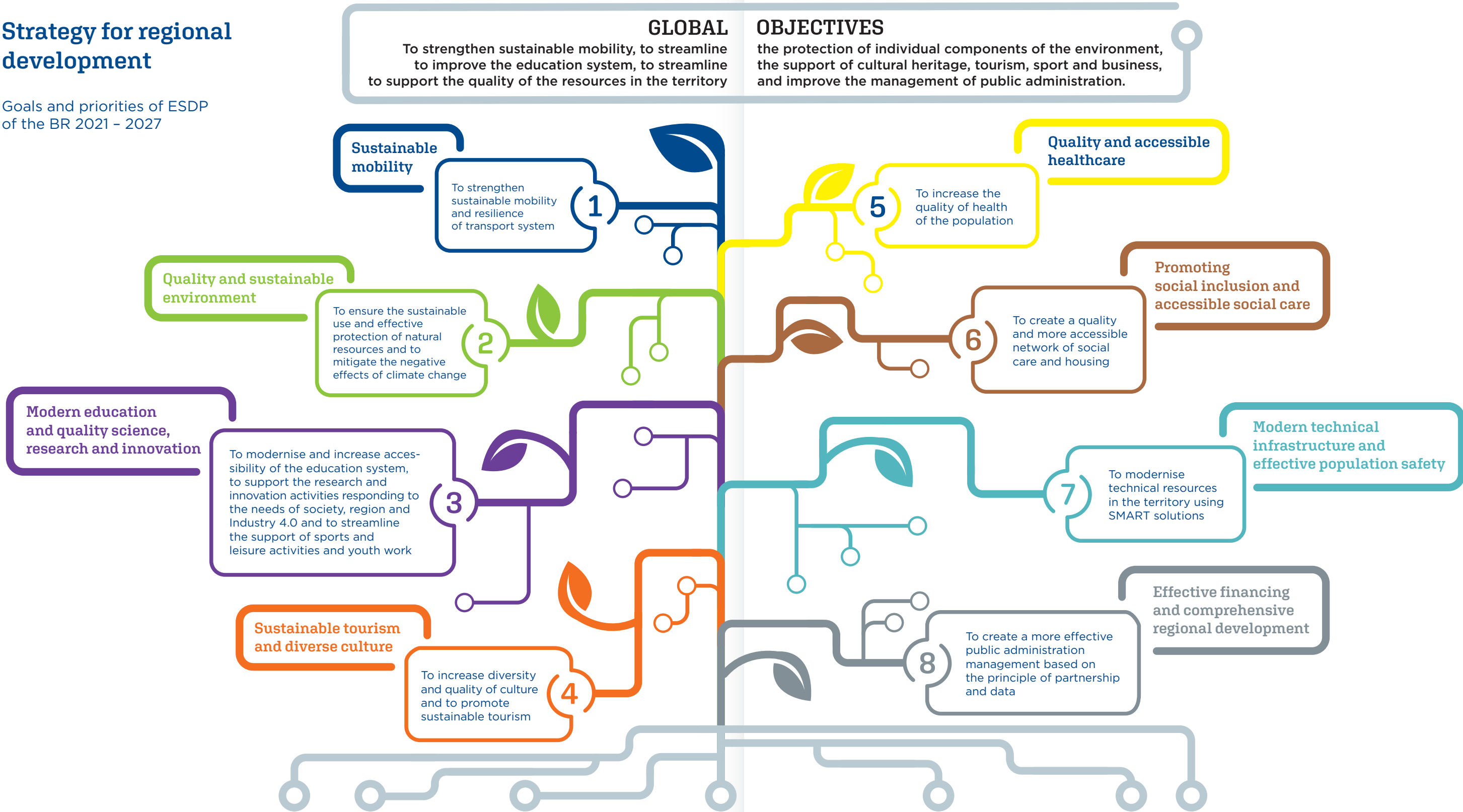
Vision

“ The Bratislava Region as a modern region with a high quality of life and environment, attractive and sustainable public transport, quality healthcare, affordable social services, modern education, and excellent and internationally recognized research, which uses the latest technologies and environmentally friendly solutions in development activities. ”

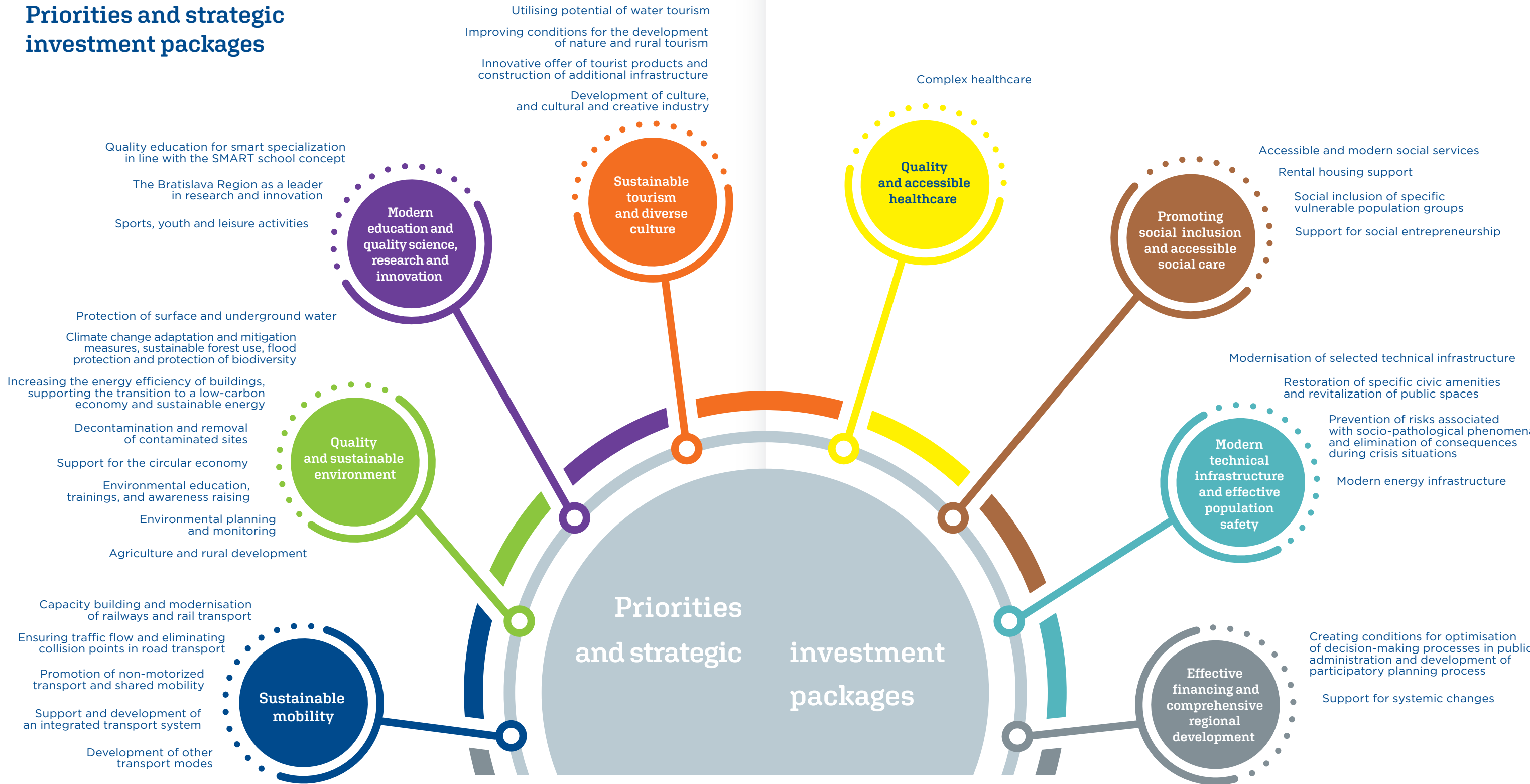


Strategy for regional development

Goals and priorities of ESDP of the BR 2021 – 2027



Priorities and strategic investment packages



1 SUSTAINABLE MOBILITY

Priority

Key challenges and problems

Inappropriate division of personal transport

Inappropriate ratio between individual car transport and public transport in the BR: **73 % car transport**, 14 % rail transport, 13 % bus transport.

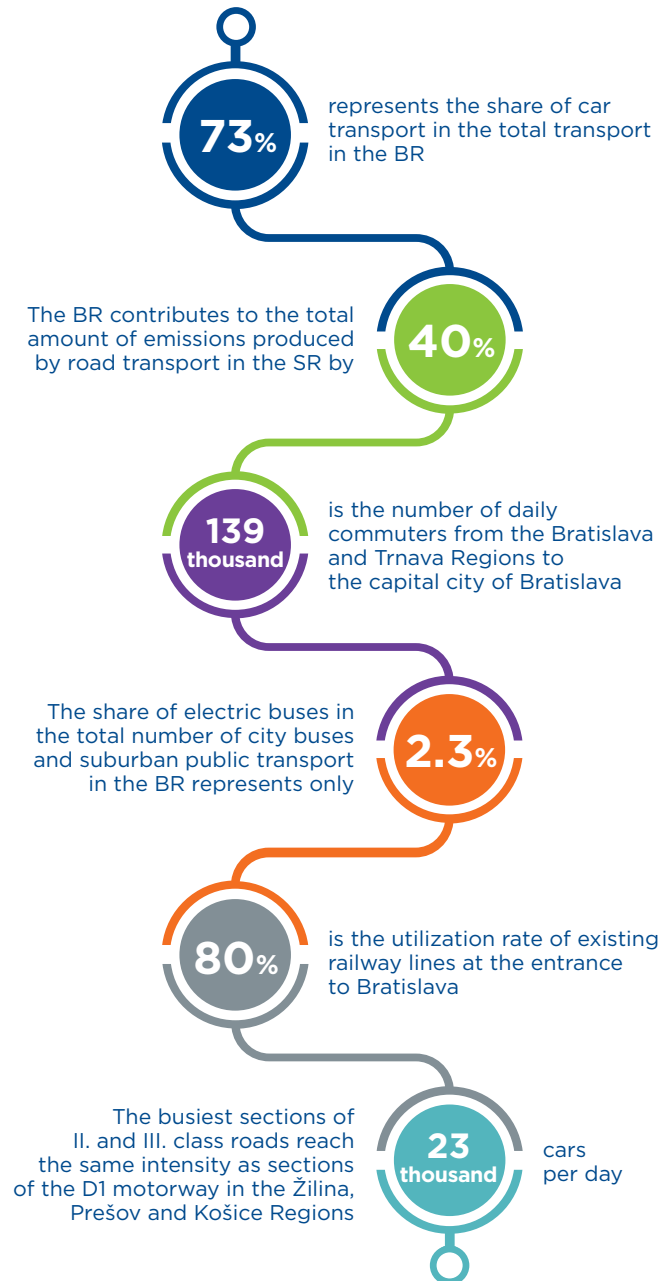
The need for transport development

Missing road bypasses in cities and municipalities with the highest traffic intensity, whose daily average ranges **from 15,000 to 23,500 cars**, high number of collision points between car traffic, cyclists and pedestrians at the entrances to cities and municipalities and in selected central and residential areas of towns and villages.

Unsatisfactory technical condition of selected II. and III. class roads, critical condition of selected bridges, insufficient cross-border road connection with Austria and insufficient network and unsatisfactory condition of local roads.

Air pollution

Transport is one of the most significant air pollutants in the region, with more than 60 % of the emissions produced in transport coming from road transport. **Automobile transport in the BR accounts for almost 40 % of the total amount of emissions produced by automobile transport throughout Slovakia.**



High traffic intensity

High traffic intensity on key roads, especially at the entrances to Bratislava with a daily average of more than 40,000 cars, while daily commute from the districts of the Bratislava and Trnava Regions to Bratislava consists of **more than 139,000 commuters.**

Low attractiveness of public transport

Low attractiveness of public transport caused by insufficient connection of railway and tram transport, low number of Park & Ride, Bike & Ride and car parks. The utilization rate of the existing railway lines in the sections entering Bratislava reached over 80 % of the current capacity.

Low share of low-emission public transport means

Share of electric buses in the **total number of buses represents only 2.3 %**, while hydrogen-powered buses are not represented at all.

Intensive transport of goods

High intensity of freight transport within trans-European transport corridors passing through the territory of the BR.

Low intensity of shipping transport

Insufficient utilization of the waterway on the Danube river, concerning both passenger and freight transport.

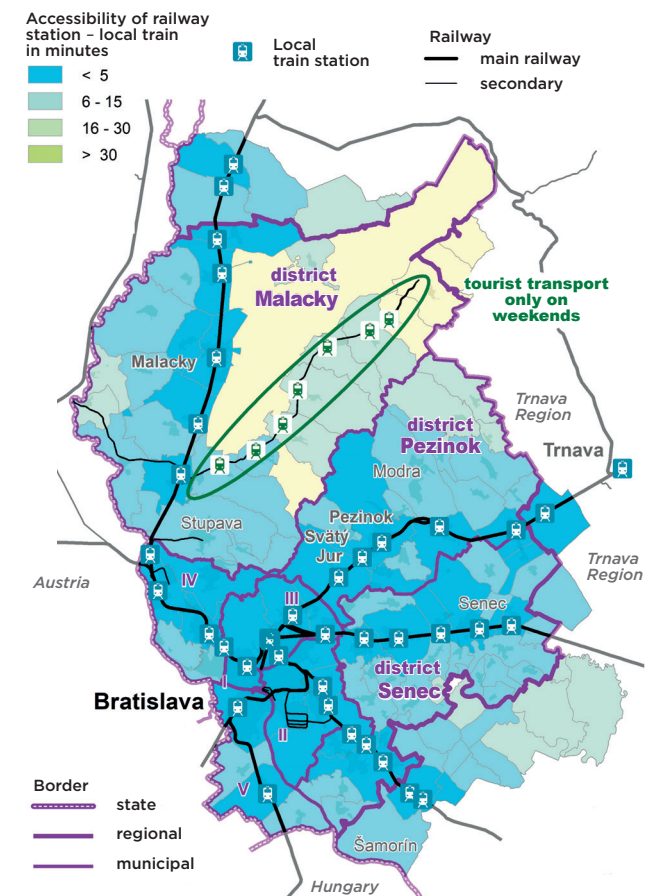
Insufficient development of bicycle transport

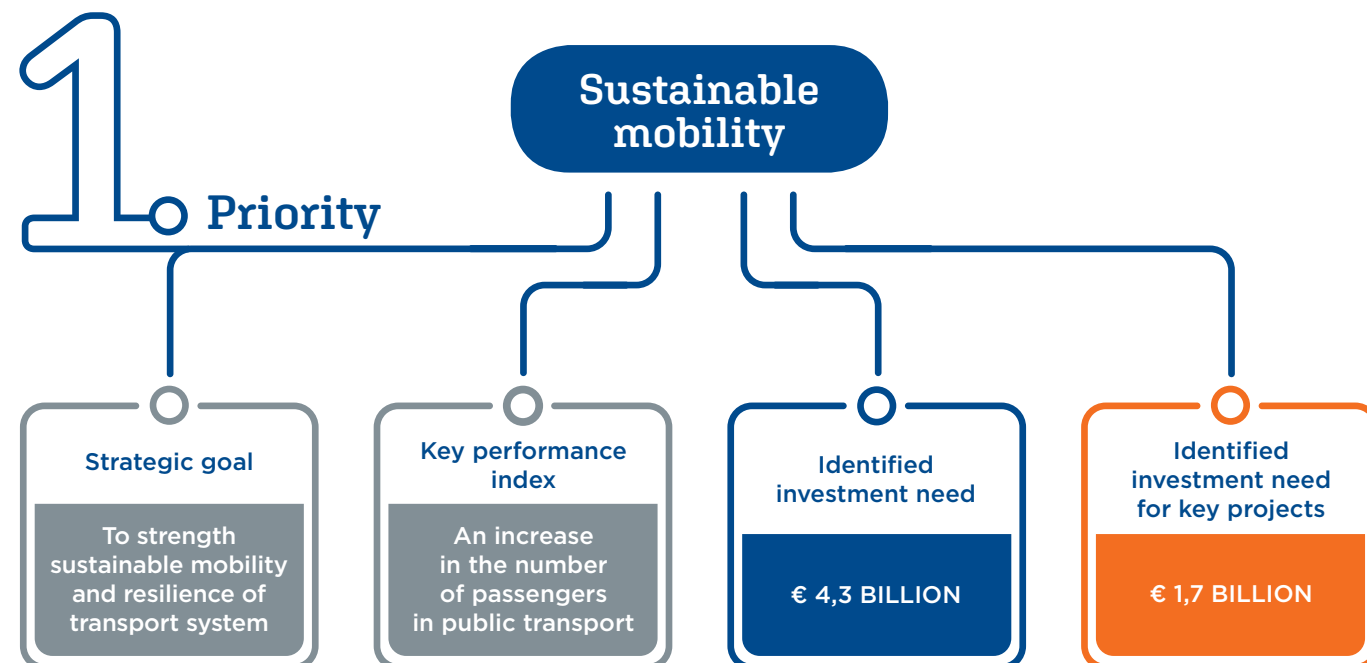
Insufficiently developed network of cycle routes in connection with journeys for work and education.

Accessibility of railway connection

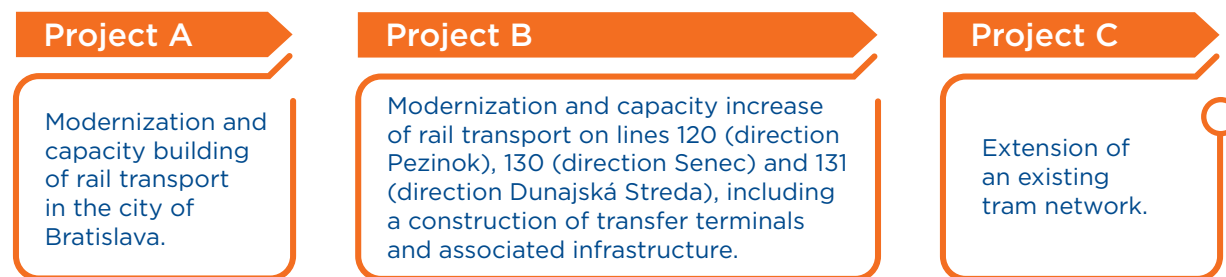
For the efficient use of railway transport, the accessibility of regular line stops in individual municipalities of the BR is important.

Accessibility of railway connections in 2019

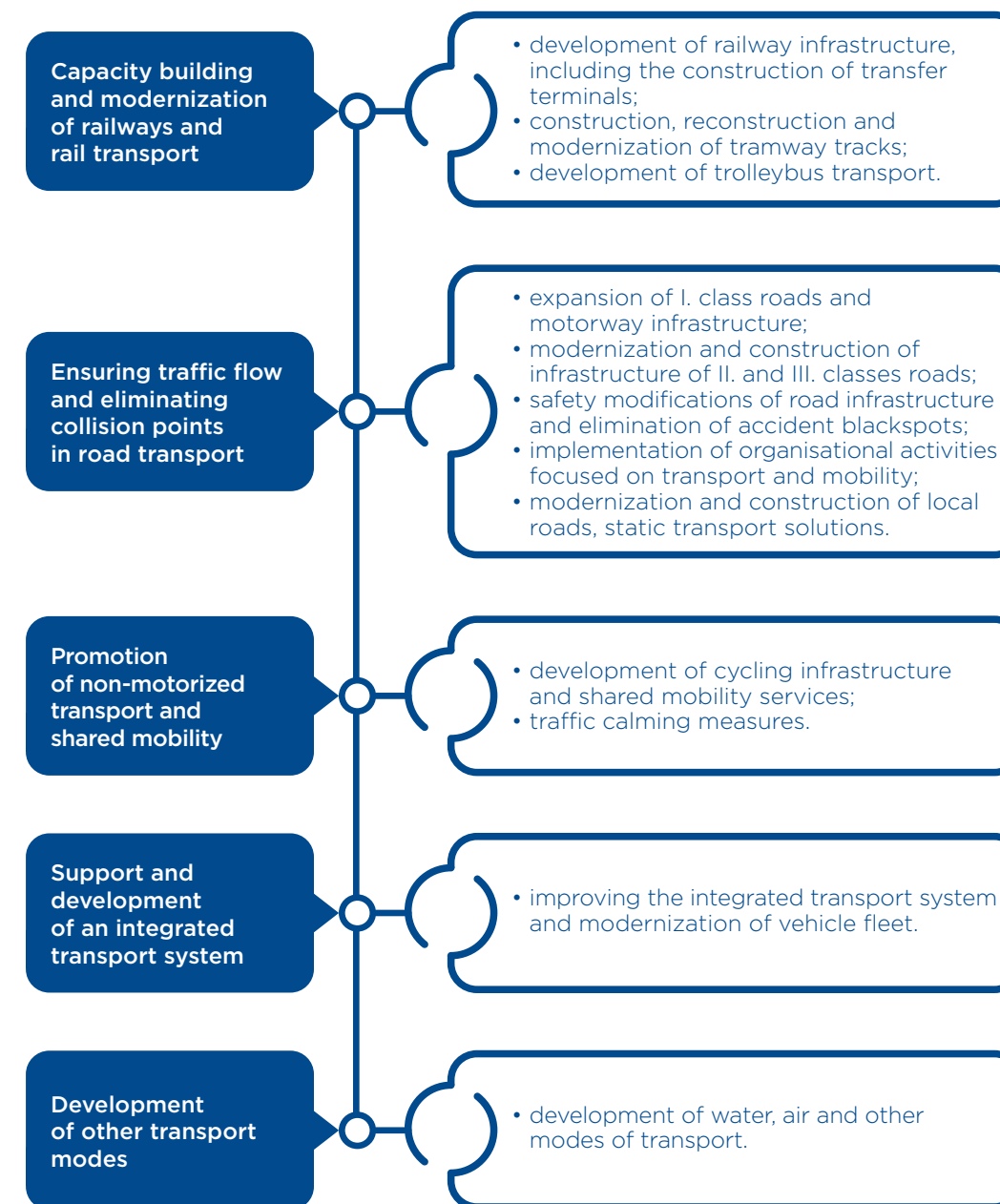




Key projects and activities within priority



Strategic investment packages and integrated project packages



2 QUALITY AND SUSTAINABLE ENVIRONMENT

Priority

Key challenges and problems

Contaminated sites

Historical heritage of contaminated sites from industrial activities (e.g. Istrochem, Vrakuňa landfill, Žabí Majer, Apollo, Matadorka, etc.): **224 registered contaminated sites, of which 23 with high priority.**

Challenges in waste management

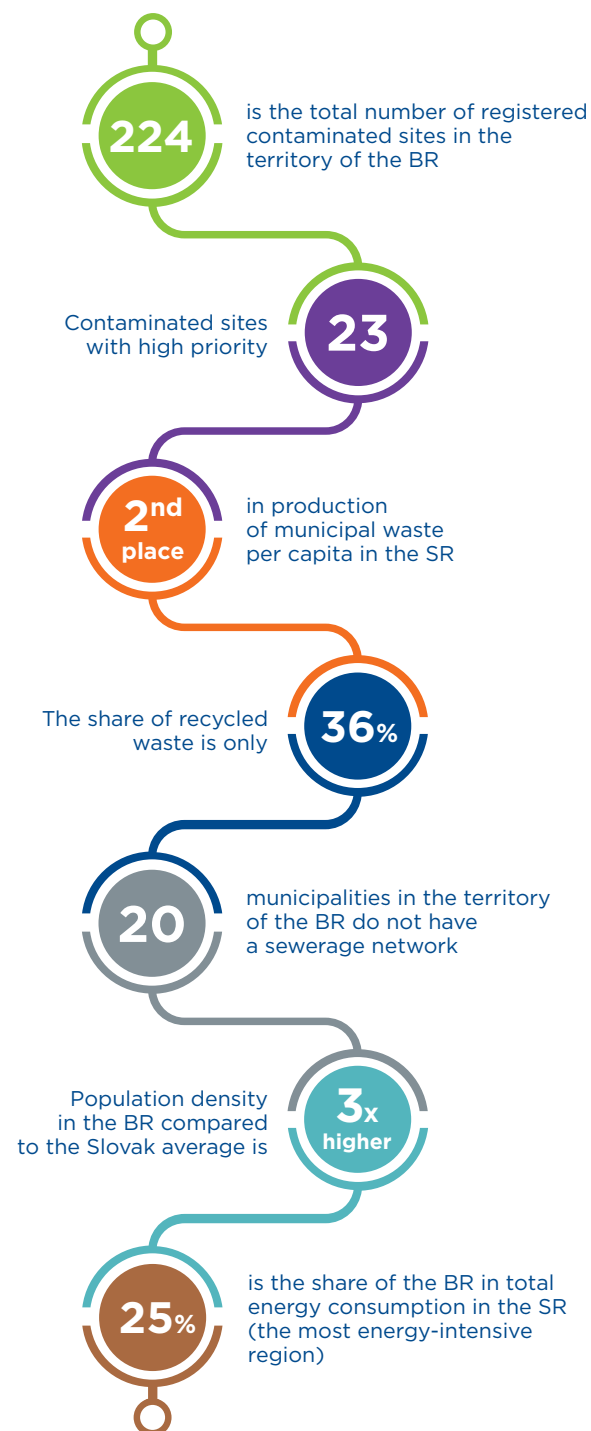
High production of municipal waste – the 2nd largest production of municipal waste per capita in the Slovak Republic; high percentage of waste in landfills (31 %); insufficient recycling rate (36 %).

Insufficient water management

Outdated condition and insufficient capacity of the public sewerage network and wastewater treatment plants (need for separate sewage and rain sewerage). **As many as 20 municipalities in the BR do not have a sewerage network**, of which 4 are located in the Žitný ostrov Protected Water Area, an important reservoir of drinking water in Central Europe; high modernization debt of the public water supply network; **4 municipalities are not connected to the public water supply at all.**

Growing share of urban population

The growing share of the urban population (79.5 %), increasing population density (3 times the Slovak average) and the resulting pressure on the environment and the quality of life of the population (water, soil and air pollution).



Negative consequences of climate change and air pollution

Negative consequences of climate change, in particular in densely built-up areas (increasing number of tropical days and overheating, drought and dust, torrential rains and flash floods, soil erosion).

Excessive air pollution, especially from transport and industrial activities.

Decreasing importance of agriculture

Decrease in the importance of agriculture; a **6 % reduction of the territory of agricultural land over the last 20 years**; extensive monocultures; biodiversity loss; excessive chemicalization.

Increasing energy intensity

High concentration of public buildings with high energy intensity; **low energy efficiency of public buildings, of which up to 75 % require deep reconstruction.**

Low use of renewable energy sources; significant modernisation debt of public lighting in the territory of the capital of the SR, Bratislava. Energy intensity of public lighting in Bratislava is twice as high as in Vienna.

The BR has in long-term the highest values in energy consumption in the SR. Despite the 16 % decrease in energy consumption in recent years, **the share of the BR in total energy consumption of the SR is 25 %.**

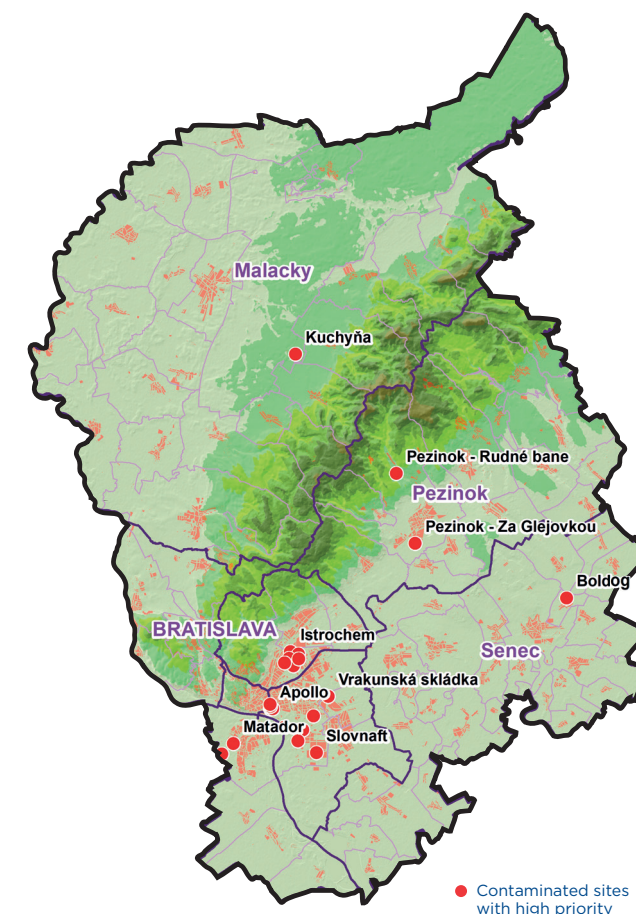
Low environmental awareness

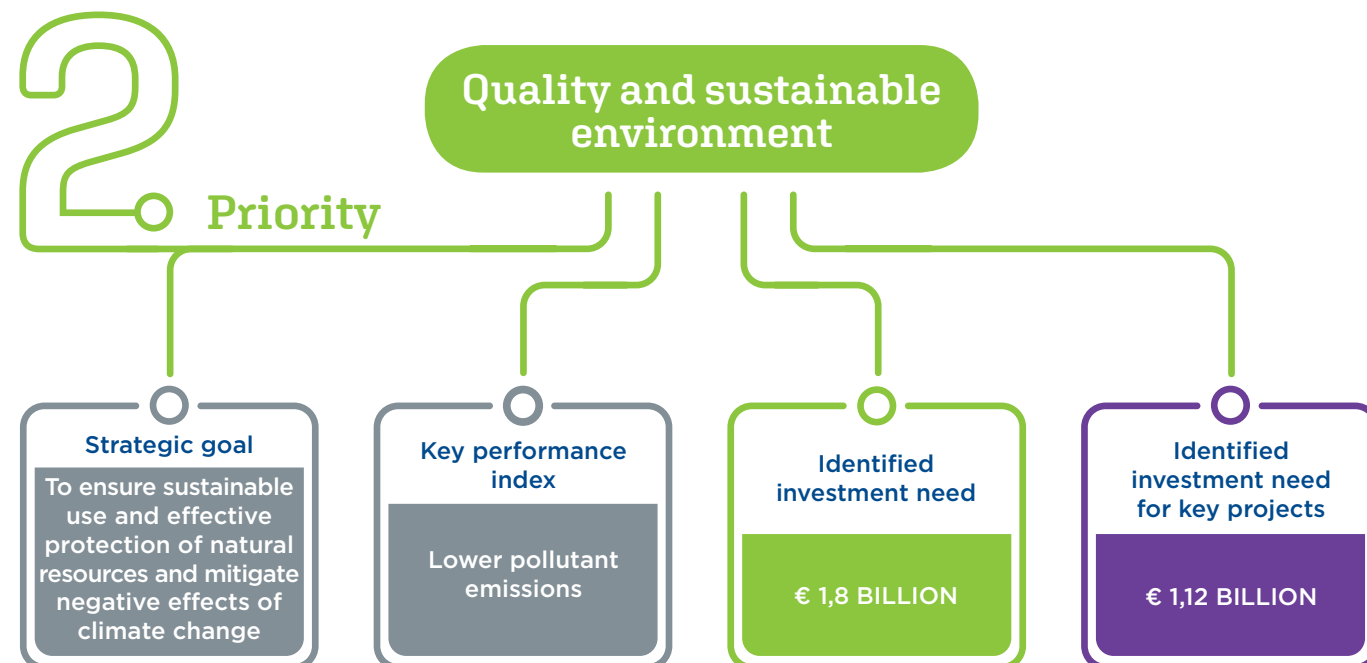
Insufficient environmental awareness and habits of the population with a negative impact on the environment.

Loss of vineyards

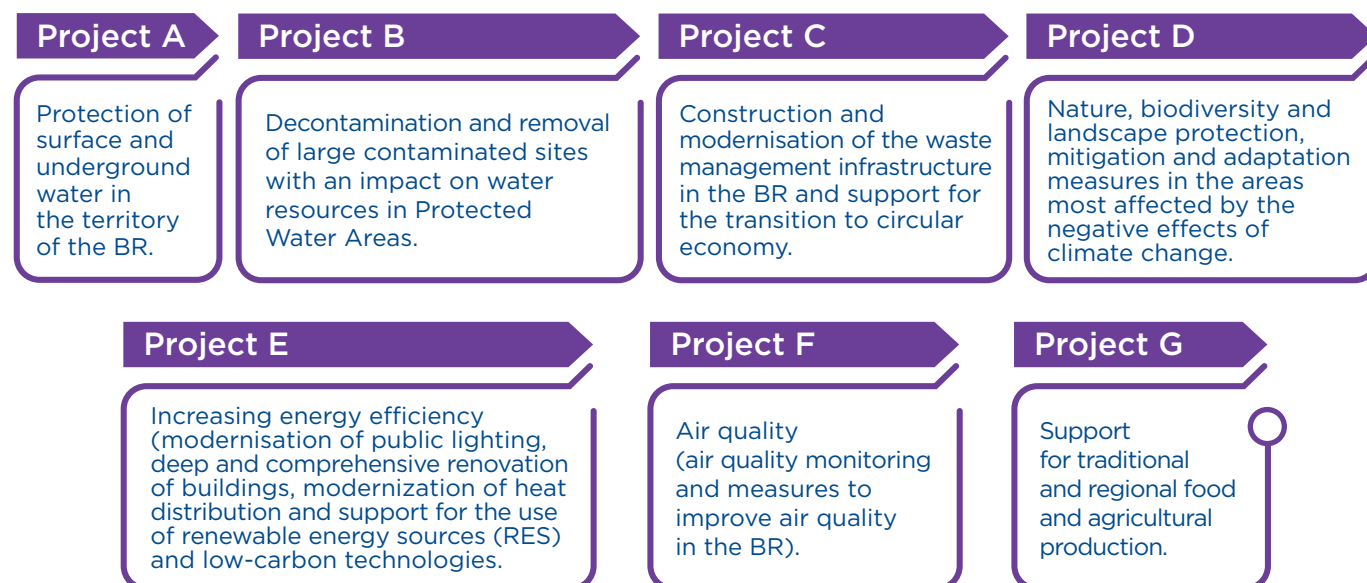
Decrease in the area of vineyards by 15 % and increase in the area of neglected vineyards caused mainly by unclear property relations.

Contaminated sites with high priority in the territory of the BR

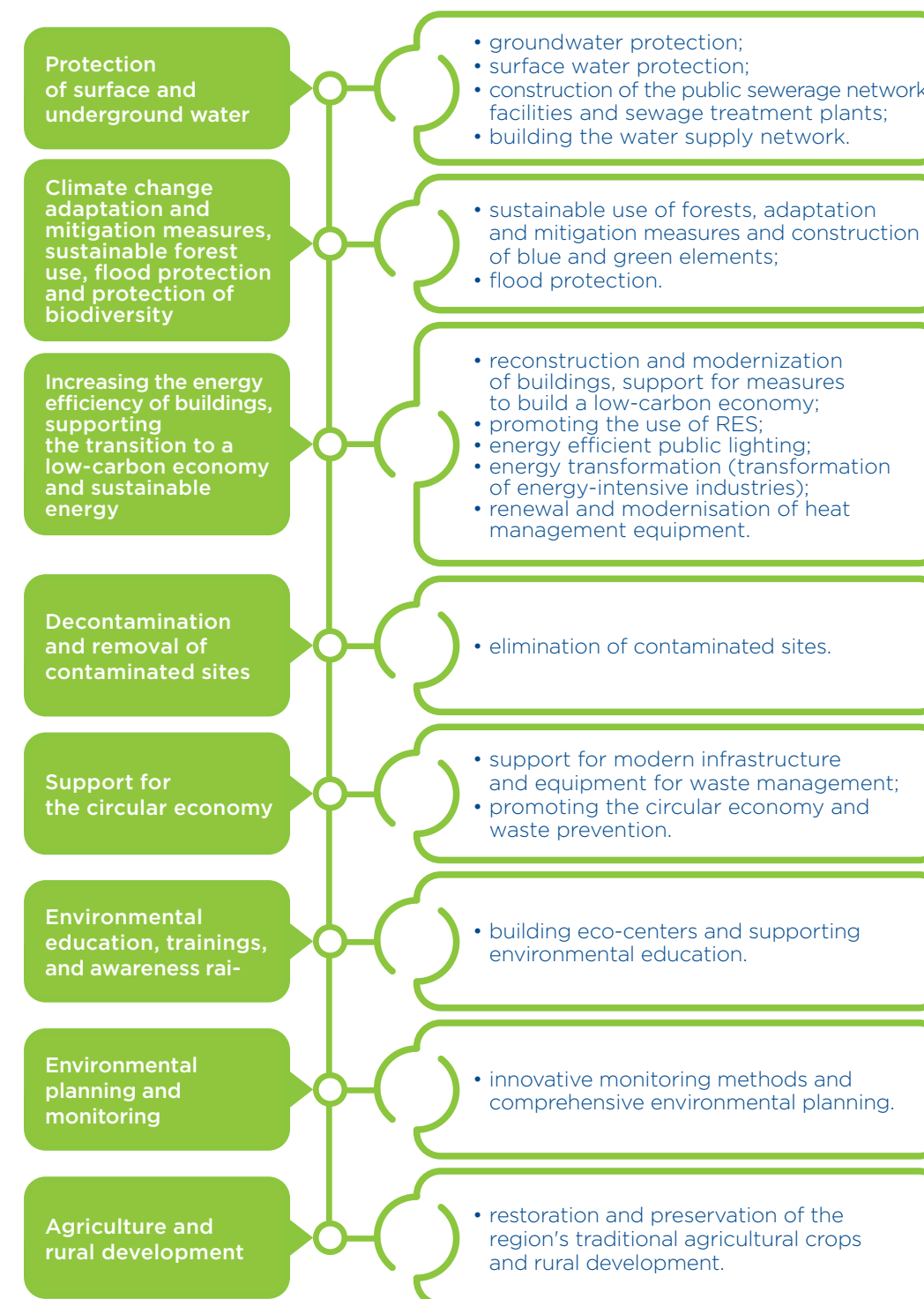




Key projects and activities within priority



Strategic investment packages and integrated project packages



3 MODERN EDUCATION AND QUALITY SCIENCE, RESEARCH AND INNOVATION

Priority

Key challenges and problems

Lack of capacities in kindergartens and primary schools

Long-term increasing demands on the number of places in kindergartens and primary schools in the region. **Lack of capacity at the level of kindergartens (need for 2,300 to 2,500 new places) and primary schools (need for 360 new tribal classes)**, due to intensive unregulated construction in suburban areas of the capital of the SR Bratislava during 2000 to 2002 and a strong demographic development in the region (population growth at the level of 7,000 - 10,000 inhabitants per year).

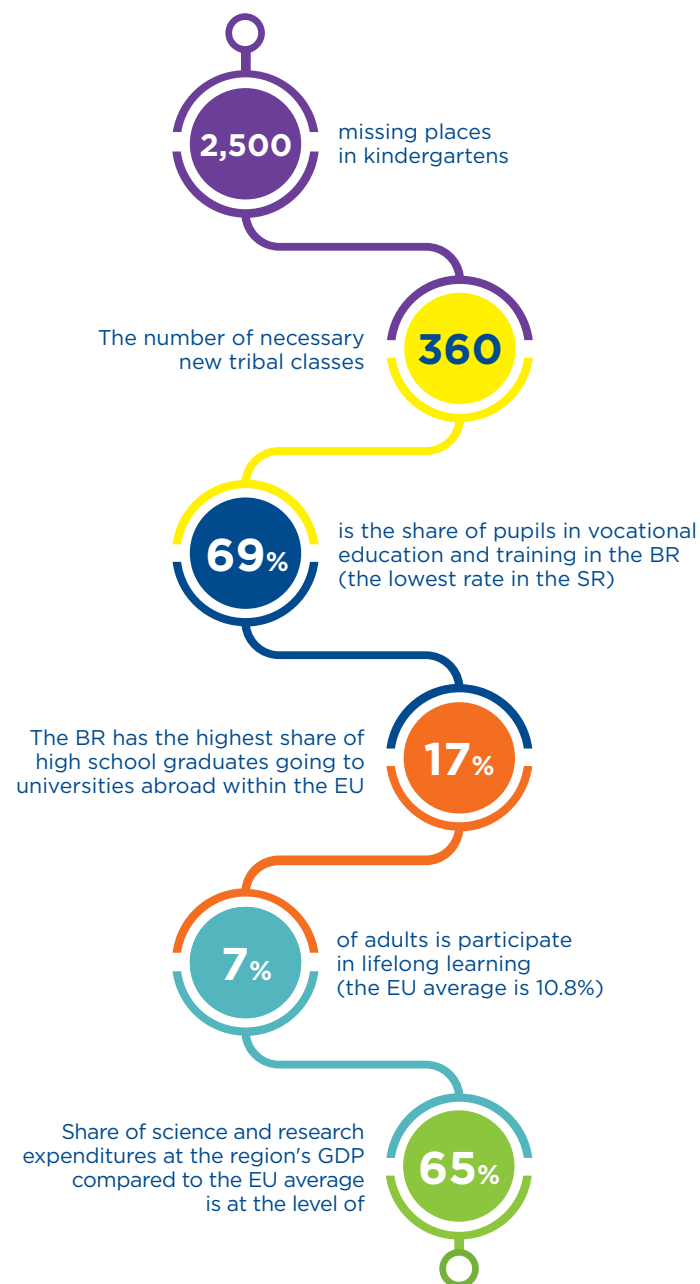
Education structure vs. practice needs

Weak connection of the education system with the needs of practice and the labor market, the lowest share of pupils in vocational education and training in the SR (69 % vs. Slovak average 76 %).

The 4th lowest share of pupils in dual education (7.20 % vs. Slovak average 6.89 %).

Low share of graduates working, in the field of education after graduating from secondary school (32 % vs. Slovak average 36 %).

Low level of cooperation and knowledge transfer between academic and private sector.



Modernisation debt of school infrastructure

High modernisation debt in school infrastructure as well as in material and technical equipment at all levels of education; significant need in the field of inclusive education (due to the ever-increasing number of pupils with special educational needs) and in the field of digitization associated with a low level of digital equipment, expansion of digital-educational content and digital skills.

Insufficient funding for science and research

Insufficient resources to fund science, research and innovation. **The share of total expenditures on research and development in the BR** is at the level of 1.42 % of the region's GDP, which represents **only 65 %** of the EU average (2.2 %).

Low share of private sources in science and research at the level of 54 % compared to 60 % at the national level. 2030 Agenda aims to reach a target share of 66 %.

Outflow of human resources

Significant outflow of highly qualified human capital abroad; the BR has the highest proportion of high school graduates continuing their studies at a university abroad (17 %) in the EU.

Low participation in lifelong learning

Low participation of adults in lifelong learning - **only 7 %** (the EU average is 10.8 %).

Low attractiveness of teaching profession

Low attractiveness of the teaching profession and lack of human resources in education; although the average monthly wage in the education sector in the region (€ 1,193) is comparable to the national level (€ 1,122), **net monetary expenditures of households in the BR are up to 35 % higher than in other regions of the SR.**

Insufficient internationalisation

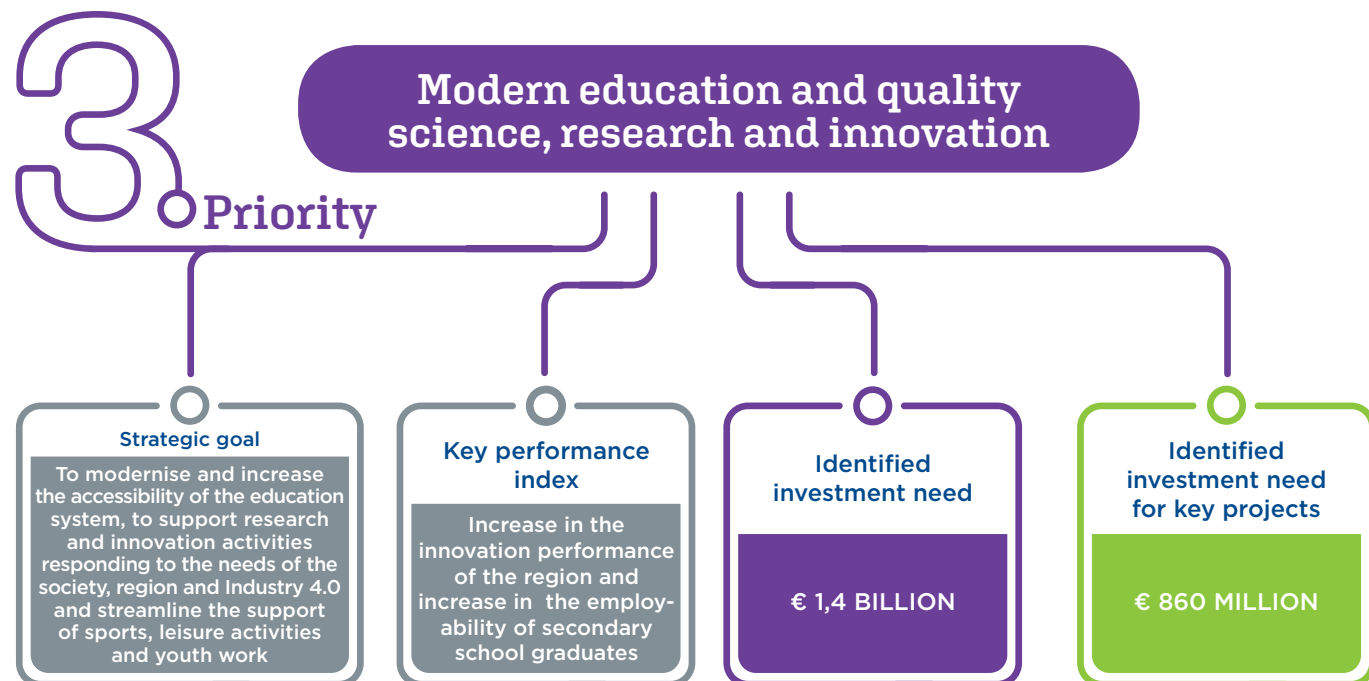
Low level of internationalisation of the university environment, science, research and innovation; low share of students going abroad for mobility (3 %); low proportion of foreign doctoral graduates (8 % vs. 25 % the EU average); low share of university employees from abroad (6 %); low level of involvement of Slovak universities in international programs and consortia.

Low innovation activity of SMEs

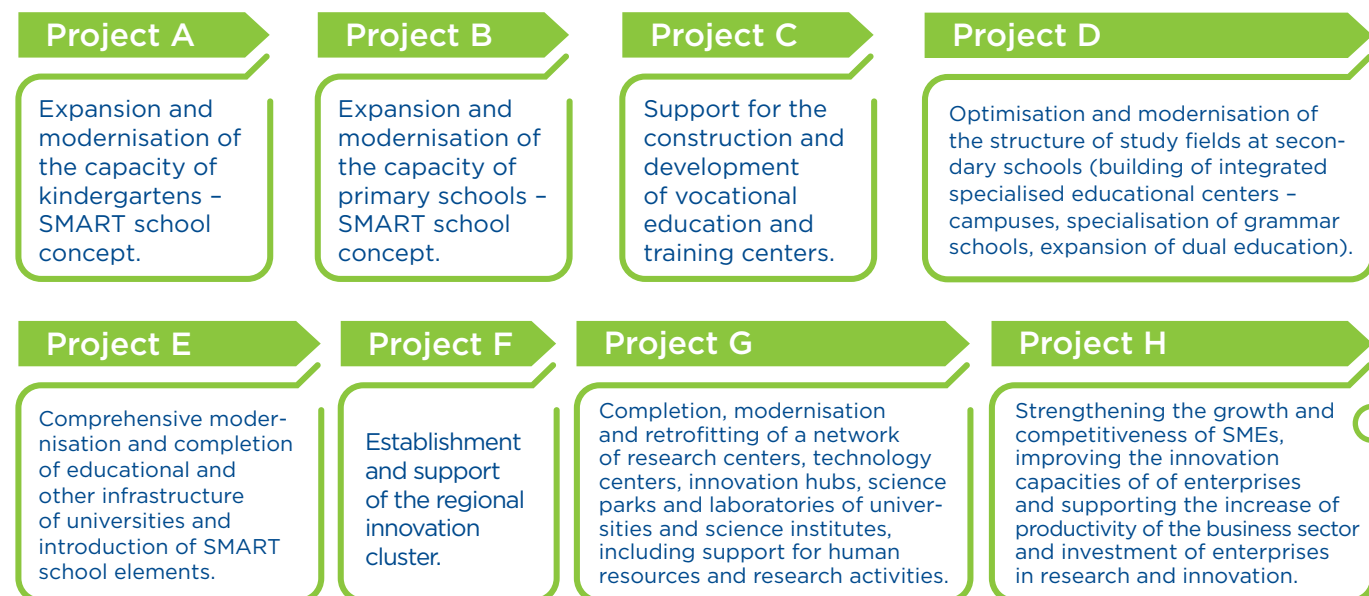
The share of SMEs that are innovating through their own capacities is only **30 % of the EU average.**
Low inflow of foreign investment with high added value.

Low level of sports facilities and leisure infrastructure

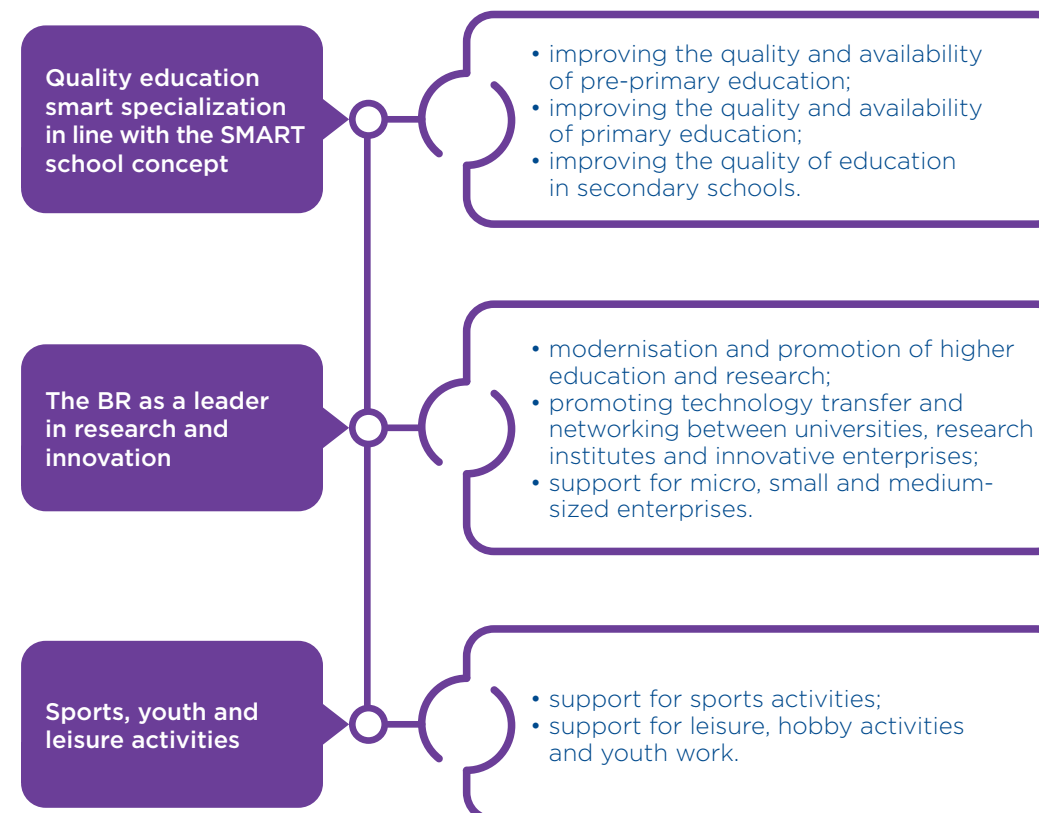
High concentration of sports and interest organizations with a nationwide scope, but a lack and low level of facilities designed for sports and leisure activities.



Key projects and activities within priority



Strategic investment packages and integrated project packages



4 SUSTAINABLE TOURISM AND DIVERSE CULTURE

Priority

Key challenges and problems

Visit rate and short stays

The BR has the highest number of visitors in the SR. Increase in the use of unofficial accommodation facilities (Airbnb, etc.) was recorded in the recent past.

Statistically, the average **length of overnight stays in the BR is 2.1 days**, compared to the national average of 2.8 days.

The total number of overnight stays in the BR reached 3,278,025 in 2019, of which 2/3 were foreign visitors.

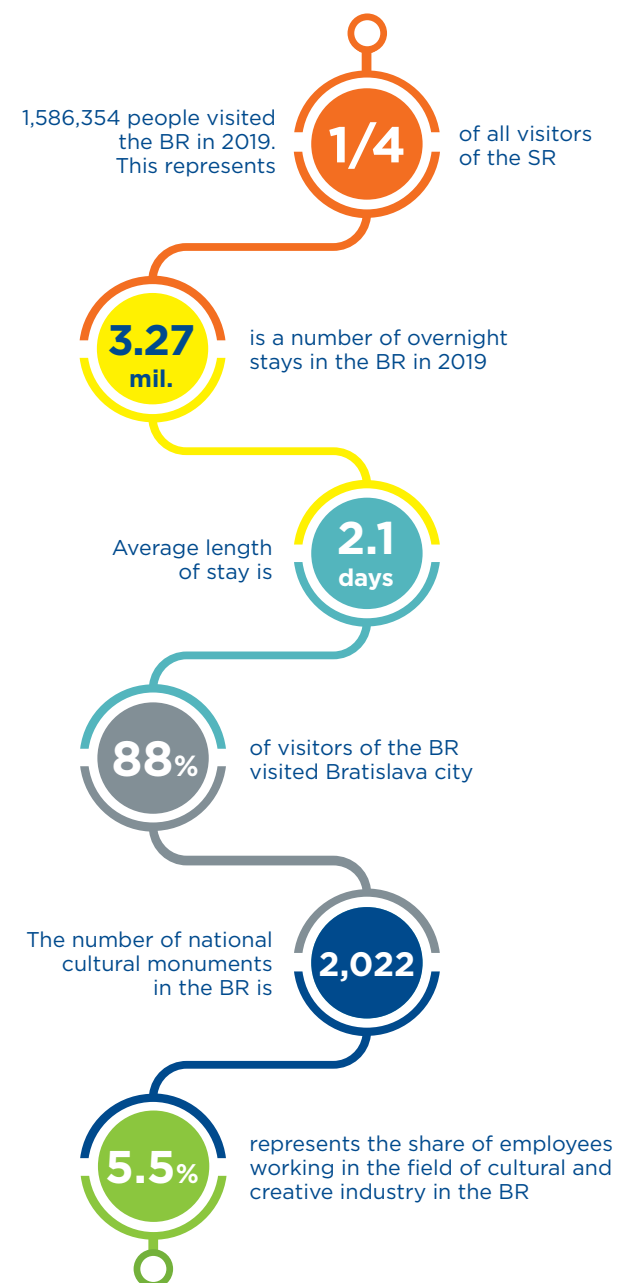
One-day and **short-term stays predominate**, especially with foreign visitors.

Orientation to Bratislava

The number of visitors in the region reached 1,586,354 (1/4 of the total number of visitors to the SR) in 2019. **Out of these, 1,395,896 (88 %) visitors visited city of Bratislava.** The offer of cultural and tourist attractions outside Bratislava seems to be insufficient.

Modernisation debt of cultural institutions

The BR has a significant representation of cultural institutions – 63 theaters and 42 permanent theater stages, 54 museums and 60 public libraries in 2019. Many of them are **in unsatisfactory technical condition** and the rate of digitalisation and introduction of modern technologies is low.



Weak support for the creative industry

Insufficient support and lack of infrastructure for the cultural and creative industry given its economic importance for the BR. As many as **5.5 %** (approx. 8.5 thousand) of the employees worked in creative industry sectors in 2019 in the BR. This is a significantly higher number than Slovak average (3.4 %). Dispersion of the concentration outside of Bratislava city is desirable.

Insufficient marketing and services

Insufficient promotion and marketing of the BR as a tourist destination on foreign markets; low level of innovation adoption and cooperation between key actors in cultural and tourism sectors.

Low quality of services in certain segments of tourism and culture, the need for education and additional training for workers in the sector.

The lack of a large-capacity cultural and congress center for the organization of international congresses, conferences and large events in the city of Bratislava.

Untapped potential of water and rural tourism

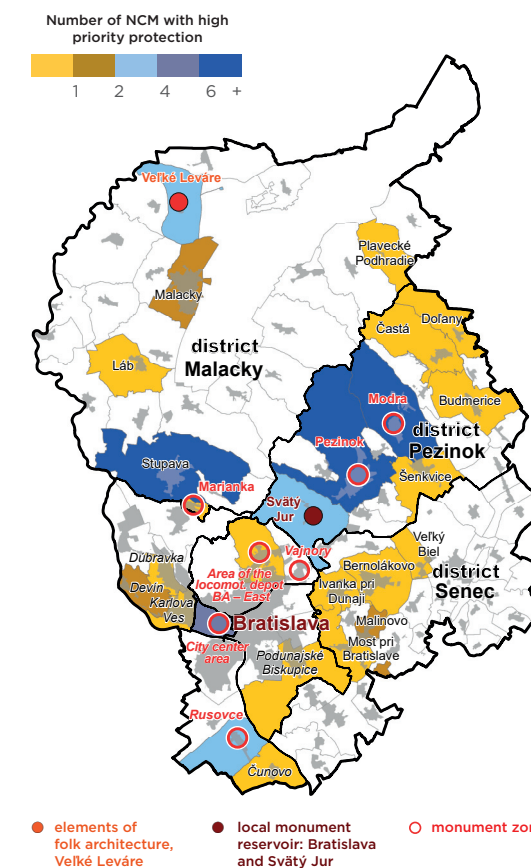
Limited use of the potential of watercourse and water areas for a purpose of water and recreational tourism, the need to develop water tourism infrastructure.

Insufficiently developed agrotourism and rural tourism in subregions of the BR, the need to develop wine tourism and sustainable nature tourism.

Unsatisfactory state of cultural monuments

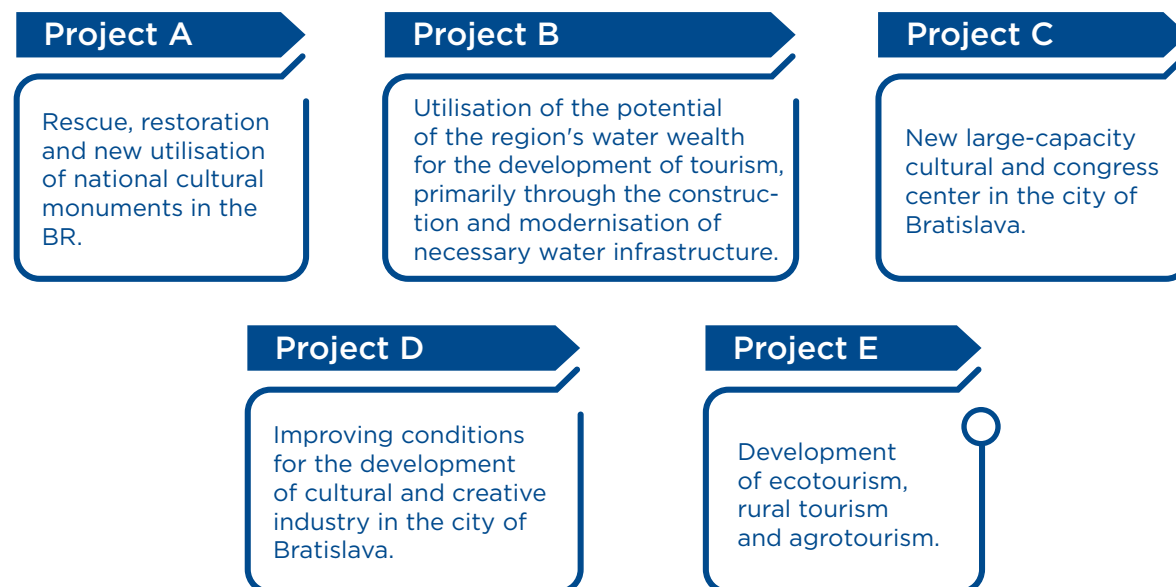
Unsatisfactory construction and technical condition of several important cultural monuments, national cultural heritage sites, their insufficient use for the needs of local residents and visitors. There are 2,022 national cultural monuments located in the BR (out of the total number of 10,037 in the SR). Cultural monuments are located in the city of Bratislava, but also in other towns, such as Pezinok and Modra (60 to 100 monuments), Svätý Jur, Stupava and the municipality of Veľké Leváre (30 – 60 monuments).

National cultural monuments with priority protection, monument reservoirs and zones

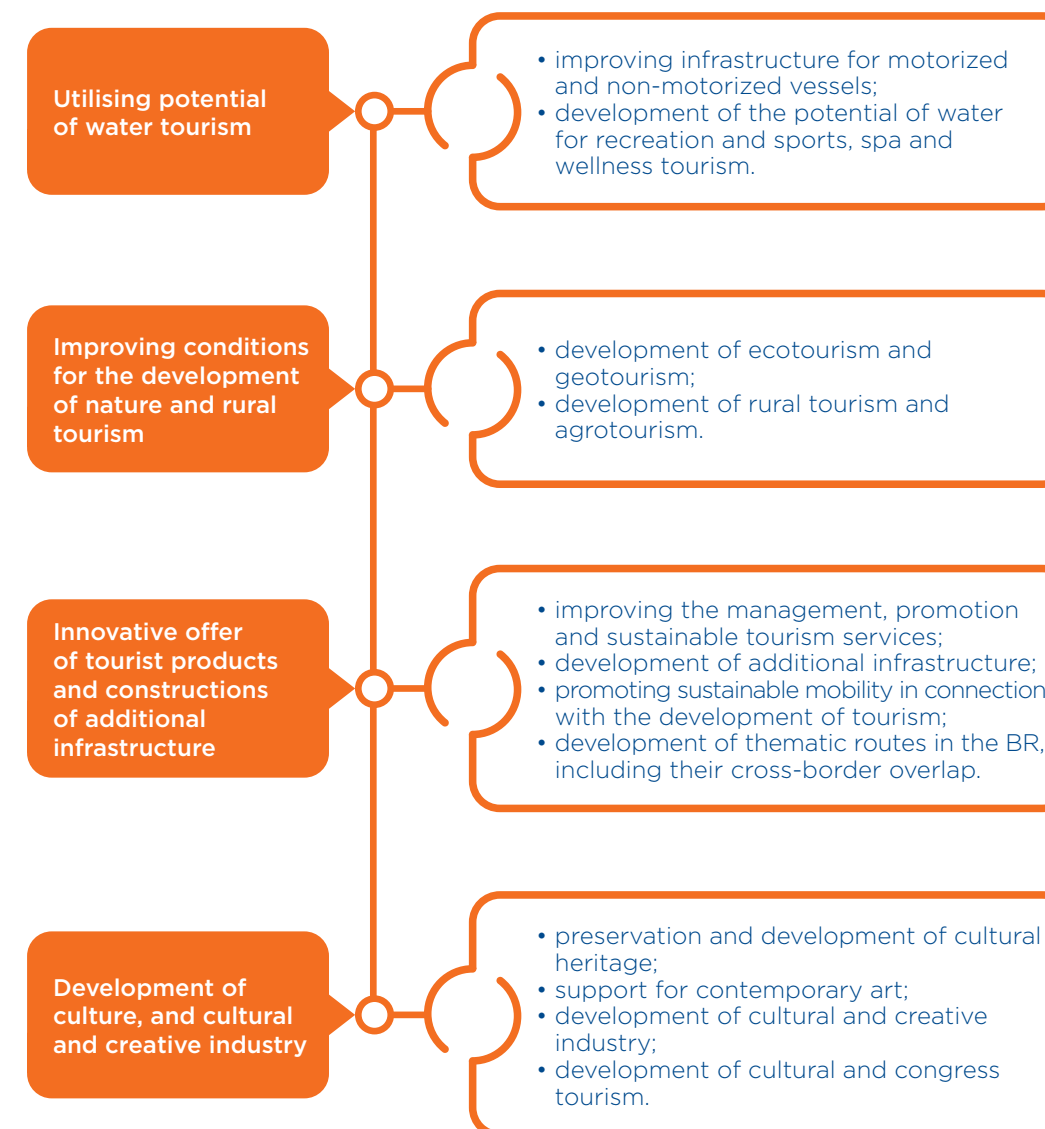




Key projects and activities within priority



Strategic investment packages and integrated project packages



5 QUALITY AND ACCESSIBLE HEALTHCARE

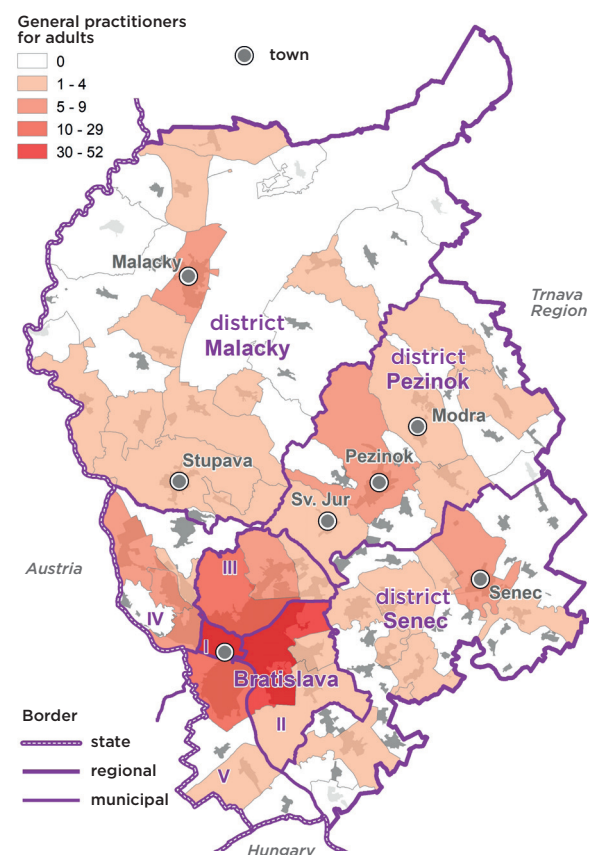
Priority

Key challenges and problems

Old age of general practitioners

Aged pediatricians and general practitioners: approx. 1/2 of pediatricians and 1/3 of general practitioners for adults are already in retirement age, what is the most among all regions in the SR.

Coverage of general practitioners' outpatient clinics in the BR in 2019



The BR is the fastest aging region in the SR



more than **30%** of general practitioners are already in the retirement

Uneven coverage of the BR by medical facilities



Lack of medical personell and their inadequate financial evaluation

Lack of medical staff

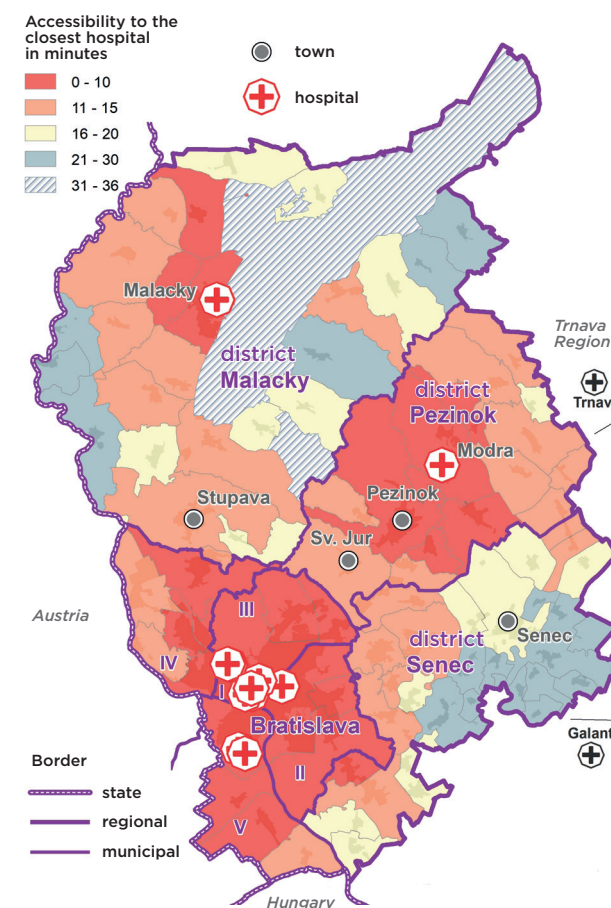
Lack of medical staff and inadequate salaries of health professionals: although the average monthly wage in healthcare in the BR (€ 1,508) is comparable to the national average monthly wage (€ 1,250), net monetary expenditure of households is higher in the BR compared to other regions by 35 %.

Inadequate medical infrastructure

Inadequate infrastructure of medical facilities, including the University Hospital in Bratislava city and high modernisation debt of institutional and outpatient healthcare facilities (e.g. Senec clinic). The highest concentration of healthcare facilities is in Bratislava city.

Insufficient cooperation between the University Hospital, other hospitals, ambulances and insurance companies.

Travel time to hospitals from the BR municipalities in the year 2019



Growing demands on healthcare

Unfavorable demographic development (aging population, growing number of people in the retirement age), the highest total increase of the population of the SR (2019) results in increasing demands of healthcare.

Insufficient supply of specialised facilities and services (e.g. palliative care). The problem with the availability of specialised outpatient care and long waiting time for examinations.

Uneven coverage of the BR by medical facilities. Insufficient continuity of the acute medical care provided by the emergency medical service and admission of the patient to the hospital.

Innovative potential of healthcare

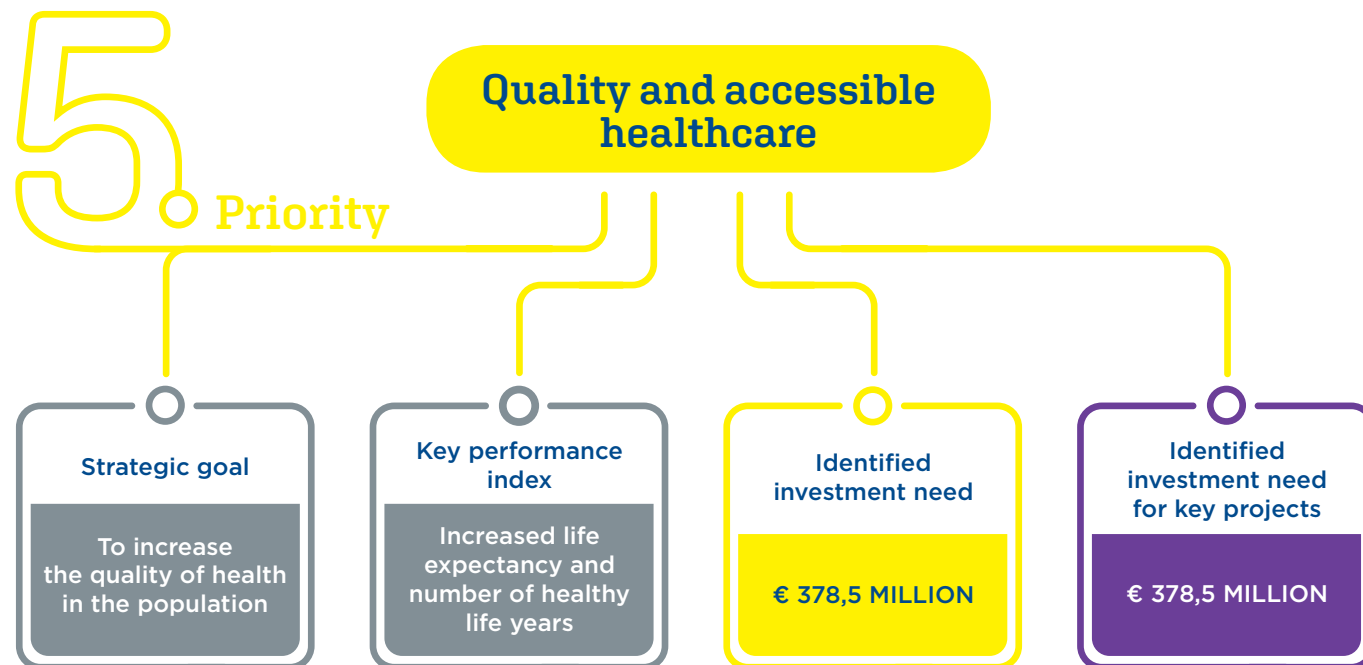
Unfulfilled research and innovation potential accumulated especially in the areas of research of new materials, nanotechnology, chemistry and health, biotechnology and ICT.

Missing auto diagnosis, personalized medicine, poor use of "big data" and artificial intelligence in healthcare.

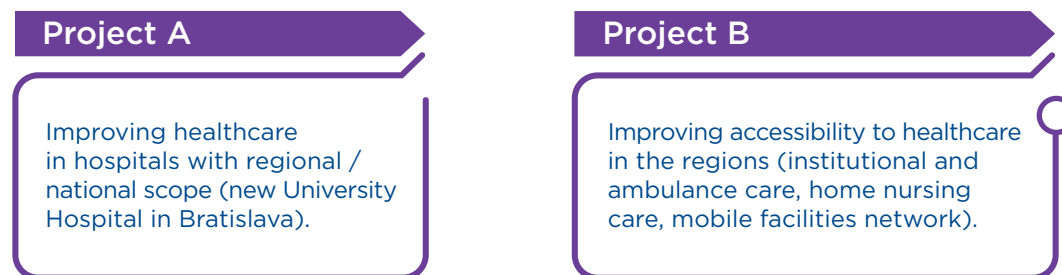
Insufficient access to current data: morbidity, demography, geography, scope of contractual relations of individual providers and insurance companies, occupancy of providers, etc.

Low level of education and prevention

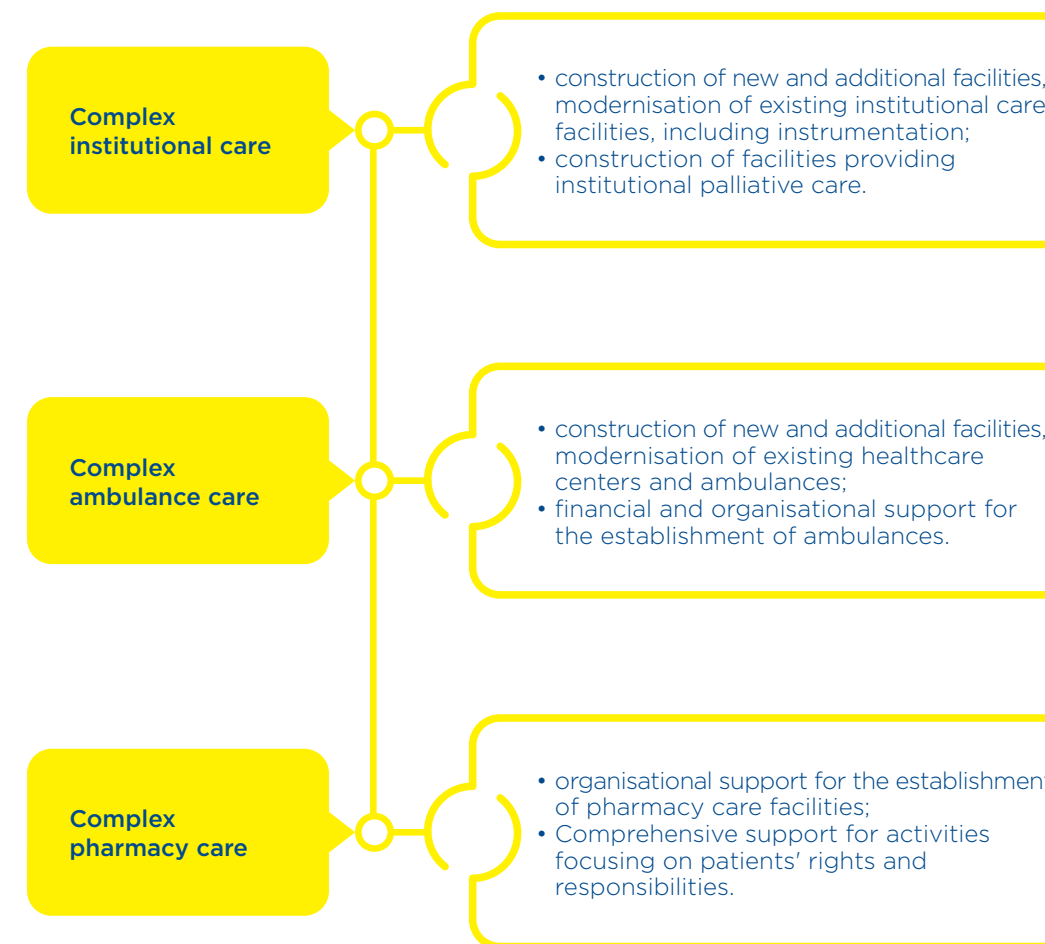
Insufficient education about a healthy lifestyle and prevention; obesity in childhood and youth.



Key projects and activities within priority



Strategic investment packages and integrated project packages





PROMOTING SOCIAL INCLUSION AND ACCESSIBLE SOCIAL CARE

Priority

Key challenges and problems

Unfavorable demographic development

Unfavorable demographic development – the number of persons aged 65+ per 100 inhabitants aged 0 – 14 is 116.8 (2020) and it is expected to increase to 230.2 (2035), a significant increase in the share of the population over 80 years (more than 10 %), growing demand for social care services.

The phenomenon of working poverty

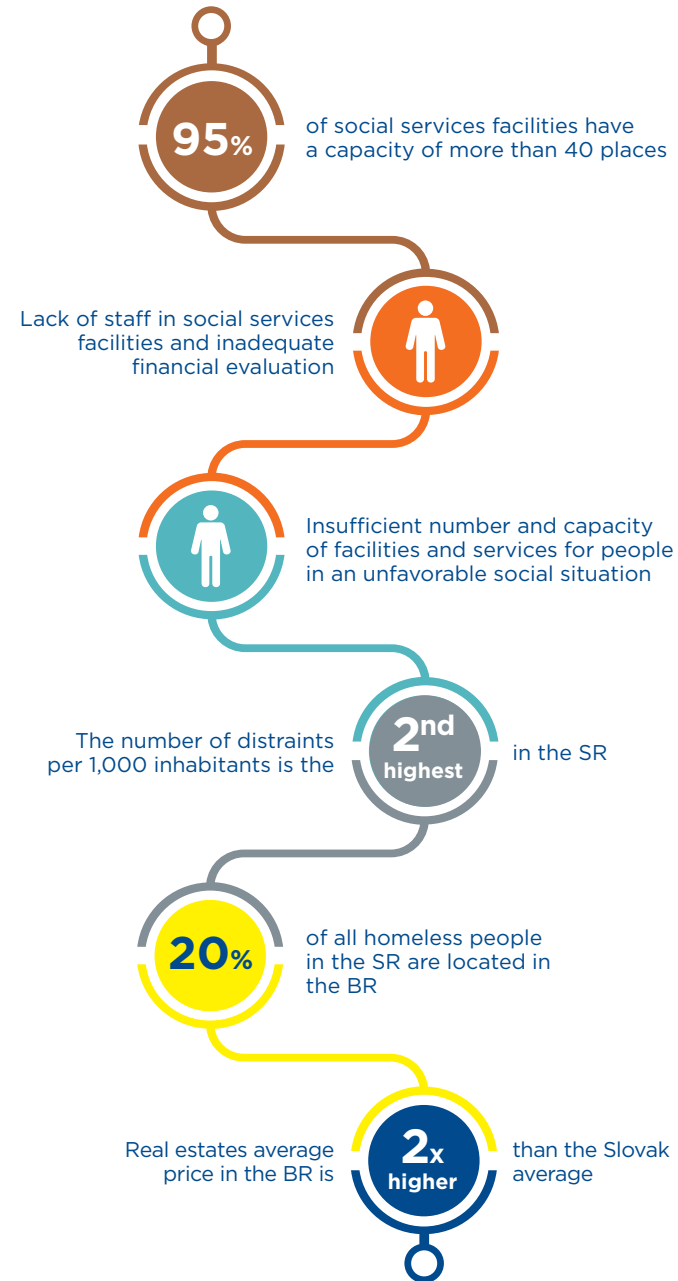
Working poor – high indebtedness of the population (78.6 executions per 1,000 inhabitants, what is the 2nd highest value in the SR); **wage and income inequalities in the context of above-average household expenditures**; the worst housing availability in the SR (high price per 1 m² of real estate).

82.1 % of households consider the payment of housing expenses to be burdensome.

57.3 % of households pay the usual expenses with difficulty.

Population growth

The highest total increase in population in the SR, which represents **an enormously high demand for the provision of social services**, e.g. facilities for children under 3 years of age (nursery).



Growing demands on social services

High number of large-capacity social services facilities (95 % of the total capacity of social services facilities), insufficient number and capacity of community social services, uneven distribution of services in the region.

Insufficient number and capacity of facilities and services for people in an unfavorable social situation (with disabilities, homeless, from excluded areas, victims of domestic violence, people with addictions, etc.).

High modernisation debt of social services infrastructure.

Lack of human resources in social services

Lack of workers in social services facilities and inadequate salaries of the personnel: the average monthly wage in the sector in the BR (€ 931) is significantly lower compared to the national average monthly wage in (€ 1,250), while **net monetary expenditure of households in the BR is up to 35 % higher compared to other regions.**

Vulnerable marginalised groups

Insufficient number and capacity of social services for groups at risk of social exclusion (families with children, youth, foreigners, Roma people from marginalised communities). **14,476 Roma people live in 22 municipalities in the BR**, of which the highest share is based in Plavecký Štvrtok (30 %).

High number of homeless people

High number of homeless people – at least 2,064 based on number of registered homeless people, but estimates discuss 4,000 to 5,000 (approx. 19 % of the total number in the SR, 1/3 without permanent residence in Bratislava).

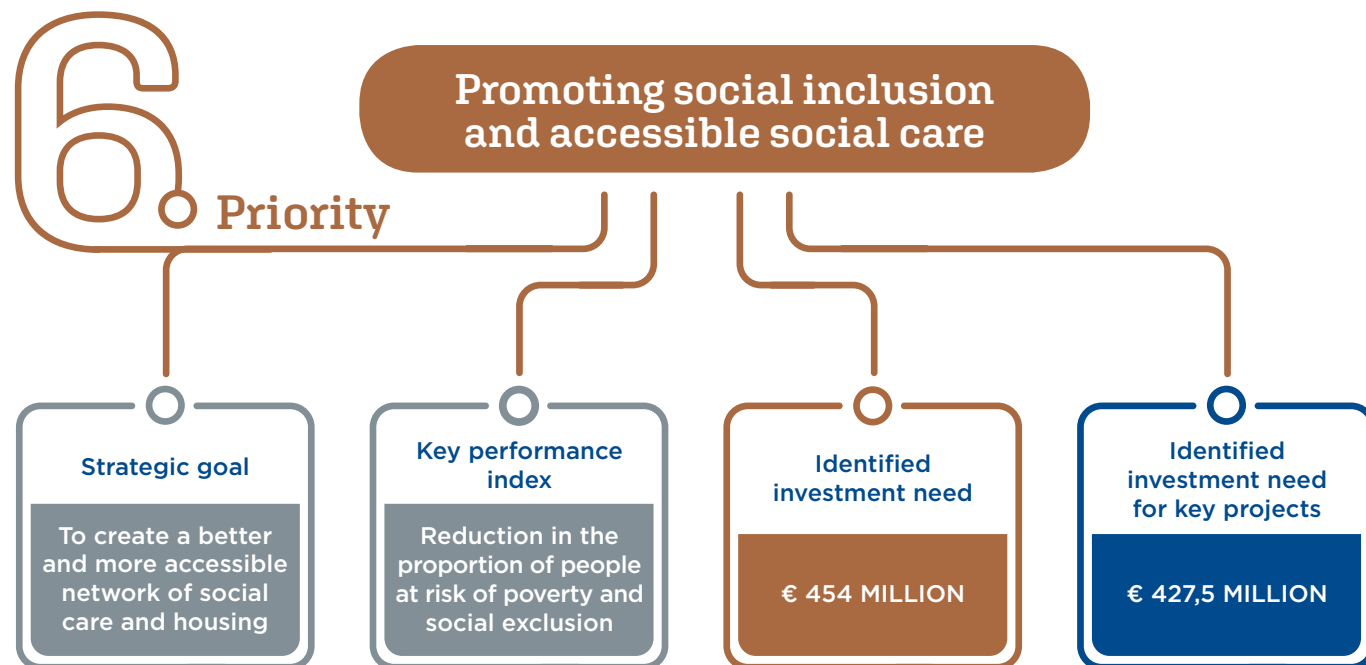
Almost 50 % of homeless people suffer from long-term health problems, up to 61 % of them face distrains and more than half have problems with debt.

Lack of job opportunities for homeless people and people with disabilities – insufficient support for social entrepreneurship.

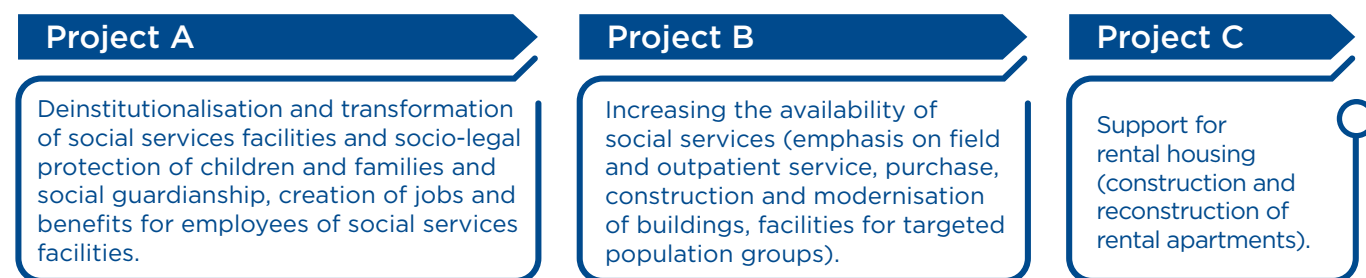
Disadvantaged foreigners

Linguistic and cultural barriers of foreigners (38,819 foreigners live in the region, i.e. 33 % of all foreigners in the SR); lack of information in foreign languages; low legal awareness about the functioning of public administration in the SR; unequal housing opportunities; problematic access to education, health and social care, distrust in public institutions, lack of experience among local governments in working with foreigners.

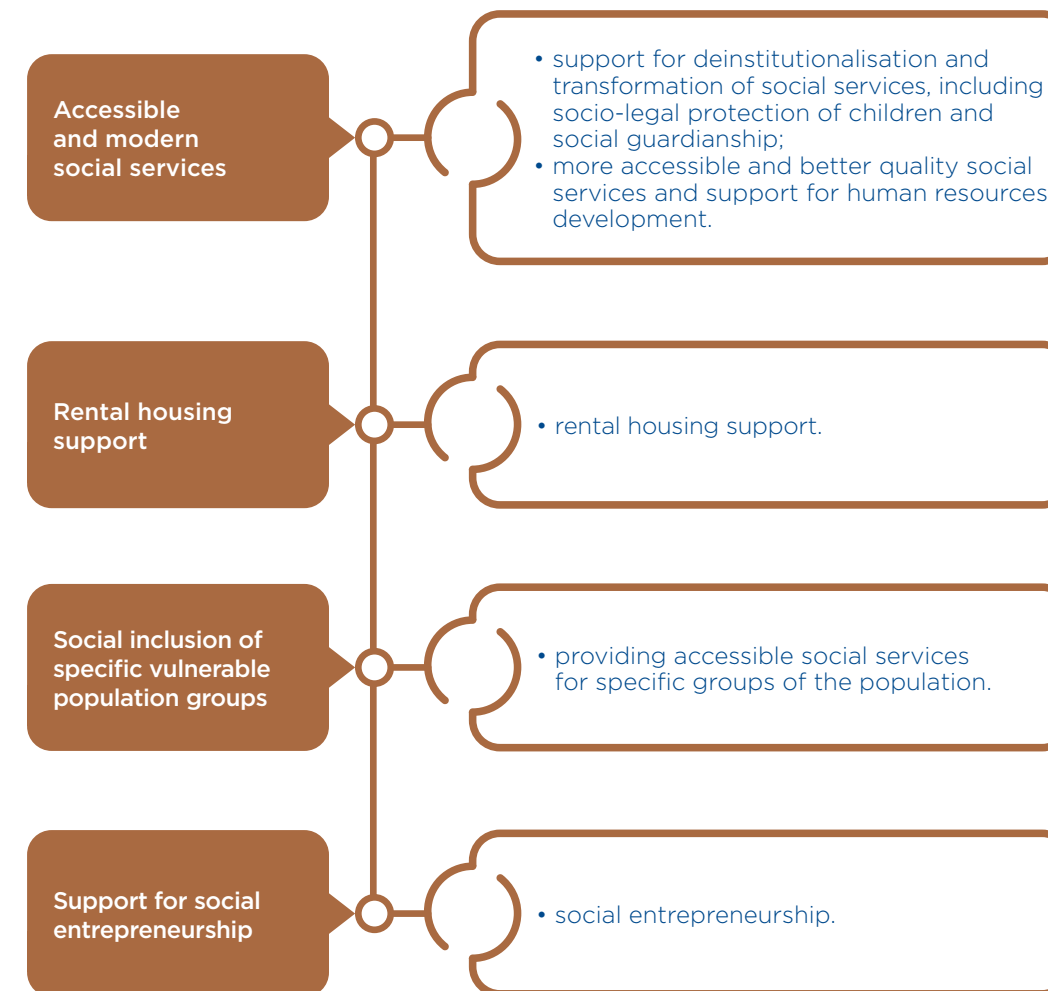




Key projects and activities within priority



Strategic investment packages and integrated project packages





MODERN TECHNICAL INFRASTRUCTURE AND EFFECTIVE POPULATION SAFETY

Priority

Key challenges and problems

High level of crime

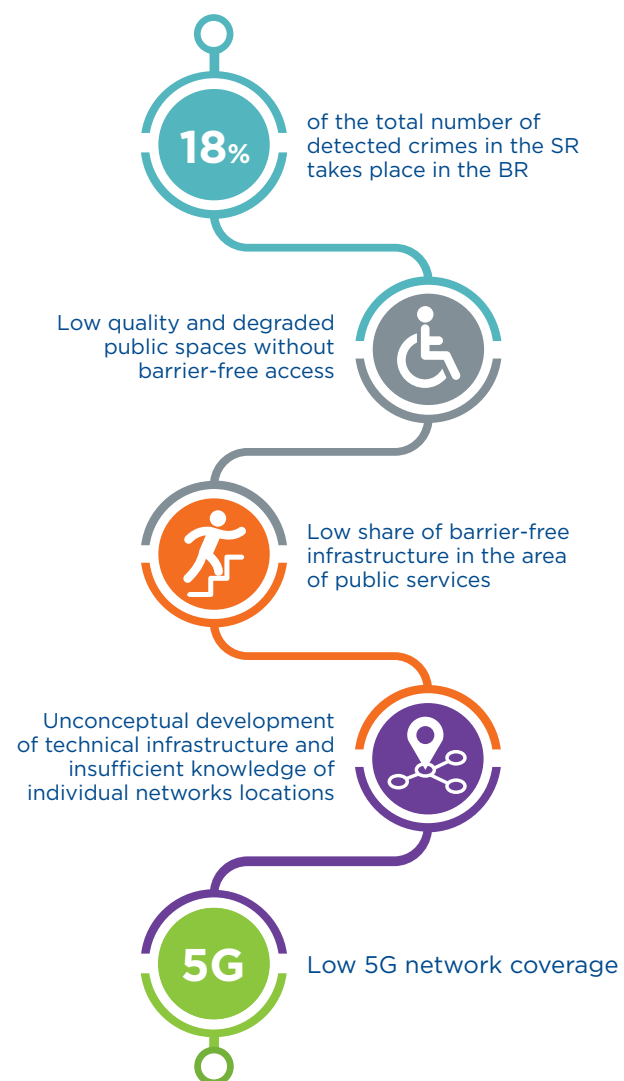
Historically the highest crime rate among regions (18 % of the total number of detected crimes in the SR); the highest number of crimes is reported by Bratislava II. district.

Low share of environmentally friendly vehicles

Insufficient infrastructure for the development of electromobility and other forms of ecological transport modes based on carbon-free fuels and problematic expansion of the infrastructure. The public charging infrastructure for electric vehicles in the BR reaches the coverage of 30 % of the whole Slovakia and no hydrogen (H2) fillers.

Need for 5G network coverage

The need to ensure 5G network coverage on the operated sections of motorways, expressways, pan-European railway corridors, inland waterways of international importance and 95 % of the population from county towns until December 31st, 2025.



The need for digital public administration

A high need for the introduction of intelligent solutions in public administration and self-government in regard to the concentration of public institutions in the capital city of Bratislava.

Growing demands on the capacity of communication infrastructure and related requirements for cyber security.

Unsatisfactory condition of public buildings

Modernisation debt and insufficient capacities of public and specific facilities for non-commercial use.

Technical infrastructure

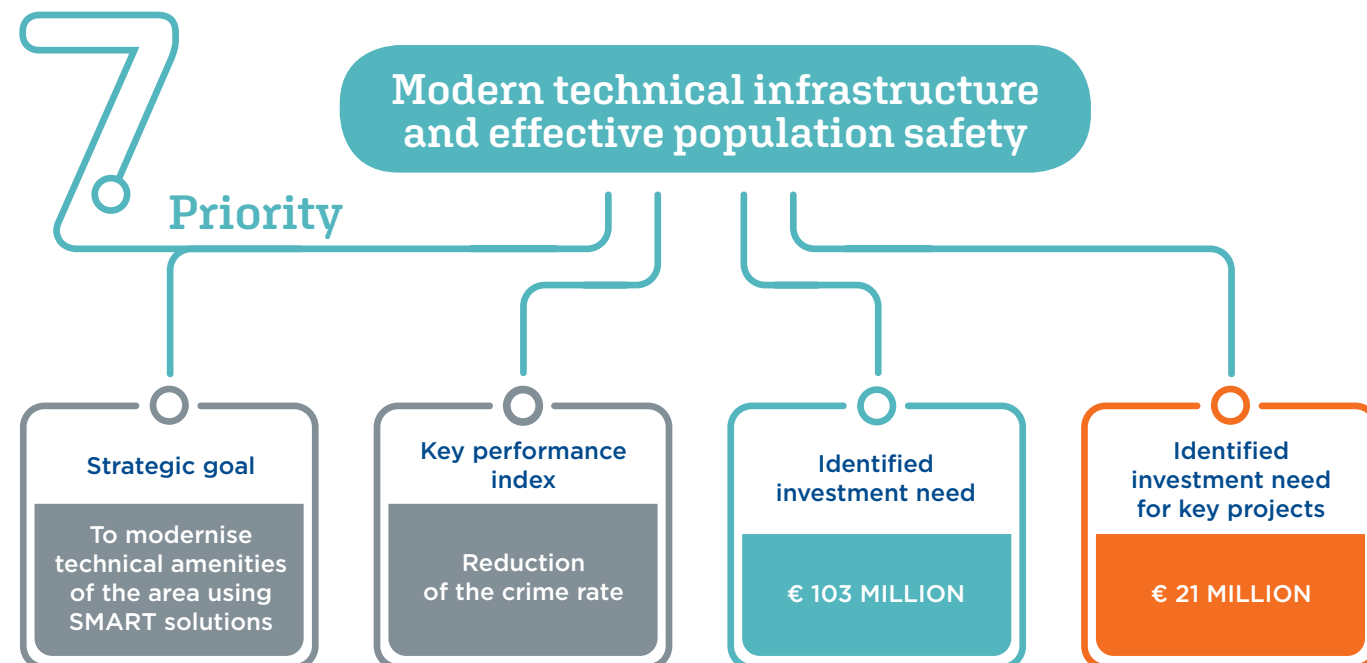
High density of technical infrastructure in a densely built-up area, **unconceptual development of technical infrastructure and insufficient knowledge of the location of individual networks**, including insufficient harmonisation of interventions into the infrastructure network.

Non-existent unified current technical map of cities in the region.

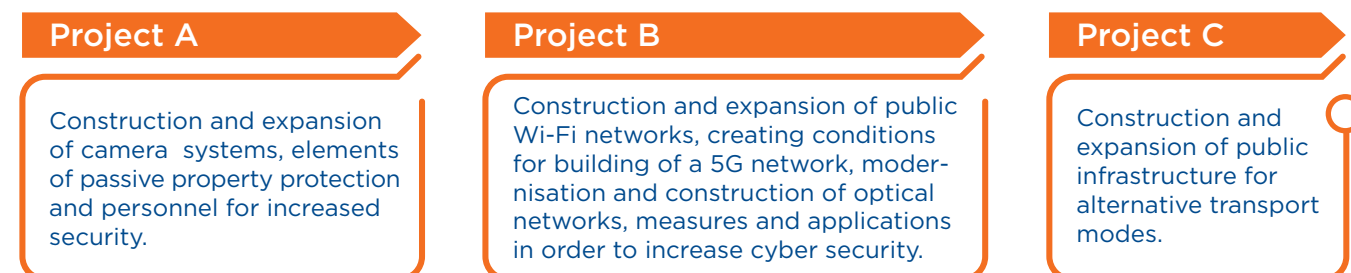
Insufficient accessibility

Low quality public spaces lacking barrier-free access.

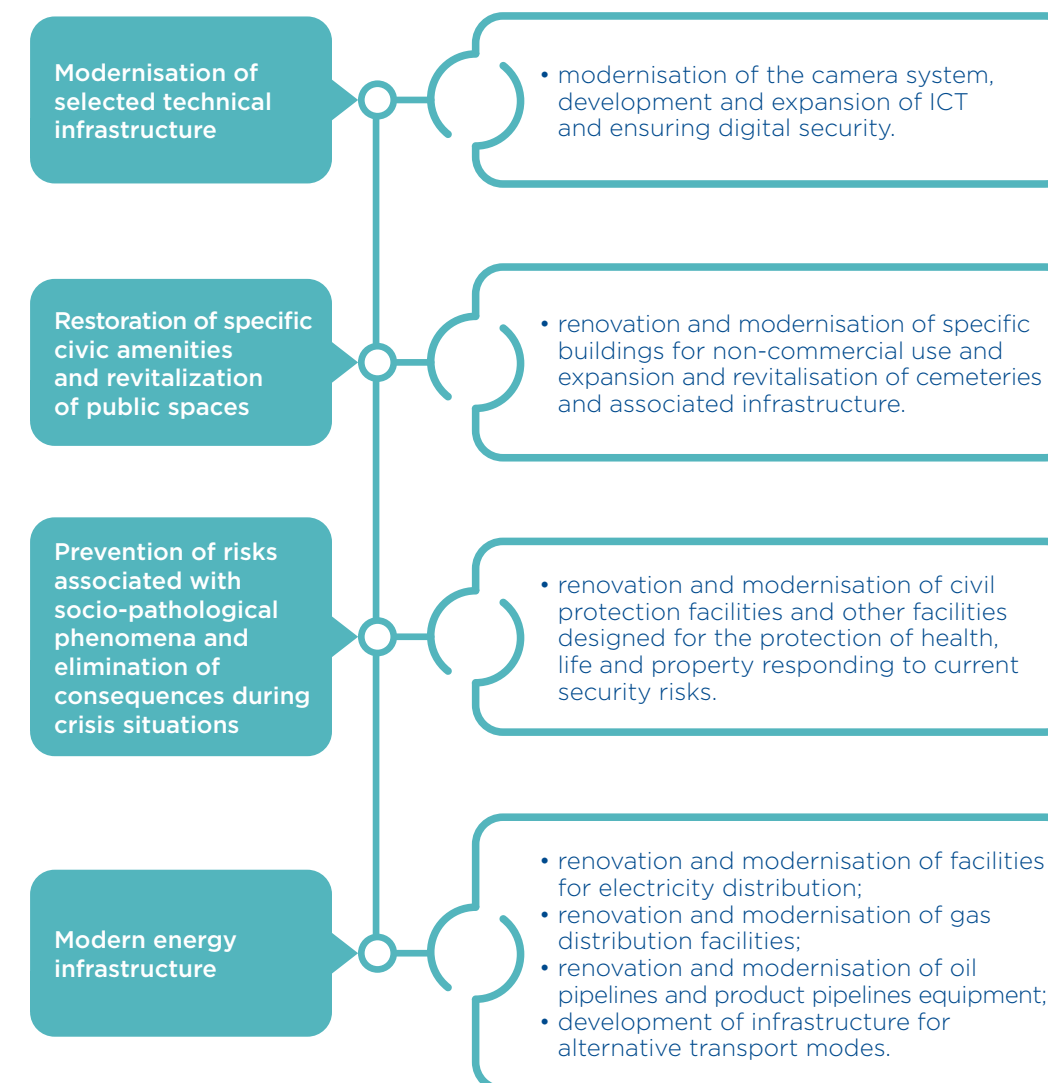




Key projects and activities within priority



Strategic investment packages and integrated project packages



EFFECTIVE FINANCING AND COMPREHENSIVE REGIONAL DEVELOPMENT

Priority

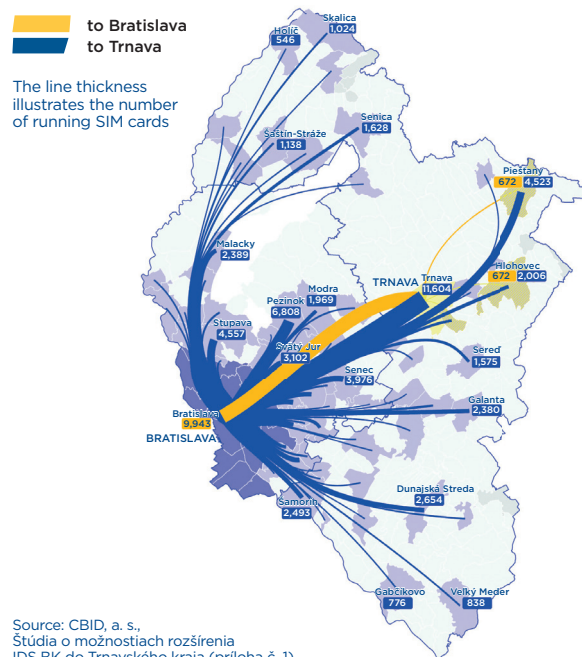
Key challenges and problems

Suburbanisation

Negative impacts of uncontrolled suburbanisation, especially in the areas of regional development poles of the capital city Bratislava; **construction of monofunctional residential suburbs** in Bratislava surroundings, **without necessary civic amenities.**

In the current tracing of population flows through modern tools, e.g. SIM cards, it seems **that the level of commute in the direction of Bratislava can be even higher by 20 – 30 % compared to the data from the last census.**

Analysis of localisation data of mobile providers in the Bratislava and Trnava regions for the needs of Bratislava integrated transport



Source: CBID, a. s.,
Štúdia o možnostiach rozšírenia
IDS BK do Trnavského kraja (príloha č. 1)


50% higher appears to be the number of people living in Bratislava compared to official statistics

SIM cards analysis shows that the number of people daily commuting to Bratislava is **20-30% higher** compared to the data from the last census



Limited competencies of self-governing region in creation of spatial planning documentation of the municipalities

Fragmentation of the competences in the field of secondary education between regional and state administration



Insufficient financing of
the competencies of
the capital city of Bratislava

The BR has the strongest concentration of persons without permanent residence in the SR

 The level of regional development is not properly reflected in the regional GDP of the BR

Shortcomings of spatial planning

Seemingly complicated processes of spatial planning and construction proceedings of municipalities resulting from currently valid building code.

An urban plan of the capital city of Bratislava, is not able to timely reflect on social and spatial changes; it does not pay sufficient attention to the mutual connections between developing and stabilized areas; a city-wide regulation in an adequate detail is missing.

Insufficient competencies of the capital city of the SR in relation to development projects.

Inefficient division of competences of the capital city, city districts and the District Office of Bratislava in relation to construction proceedings and spatial planning.

Underestimated financing of Bratislava

Insufficient financing of the competences of the Bratislava city in relation to its status of the capital city.

Lack of applications for permanent residence

The strongest concentration of people without permanent residence in the SR is in the BR, including a high number of daily commuters to the capital.

Unresolved property issues

Unresolved property and legal relations under public buildings.

Insufficient digitalisation

Low utilization of digitalised public services.

Low level of public participation

Low level of interest among the population in the administrative participatory processes in public affairs.

Unused potential of interconnectedness of the region

Insufficient use of interregional and international potential of the Bratislava metropolitan region.

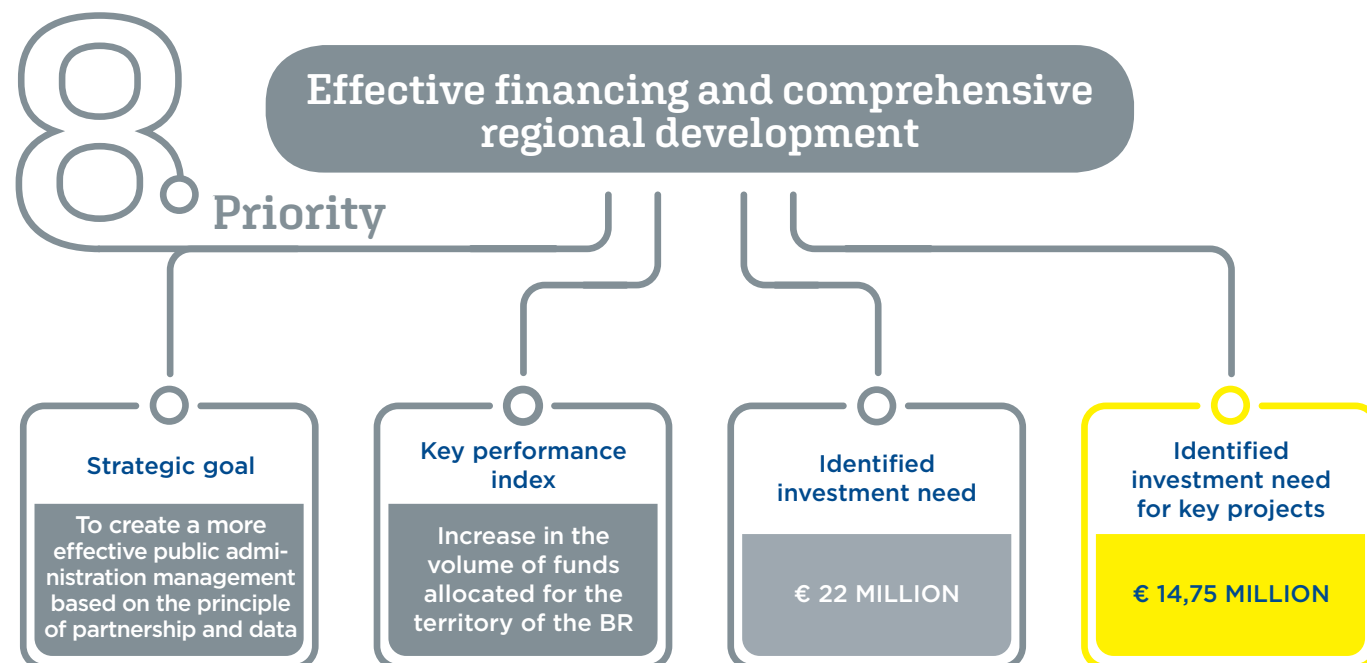
An inappropriate measurement of regional development

The level of the regional development is not reflected in the level of GDP. The BR despite high statistical development based on high GDP per capita (PPS), faces enormous modernisation debt, among other reasons also due to the limited eligibility to ESIF.

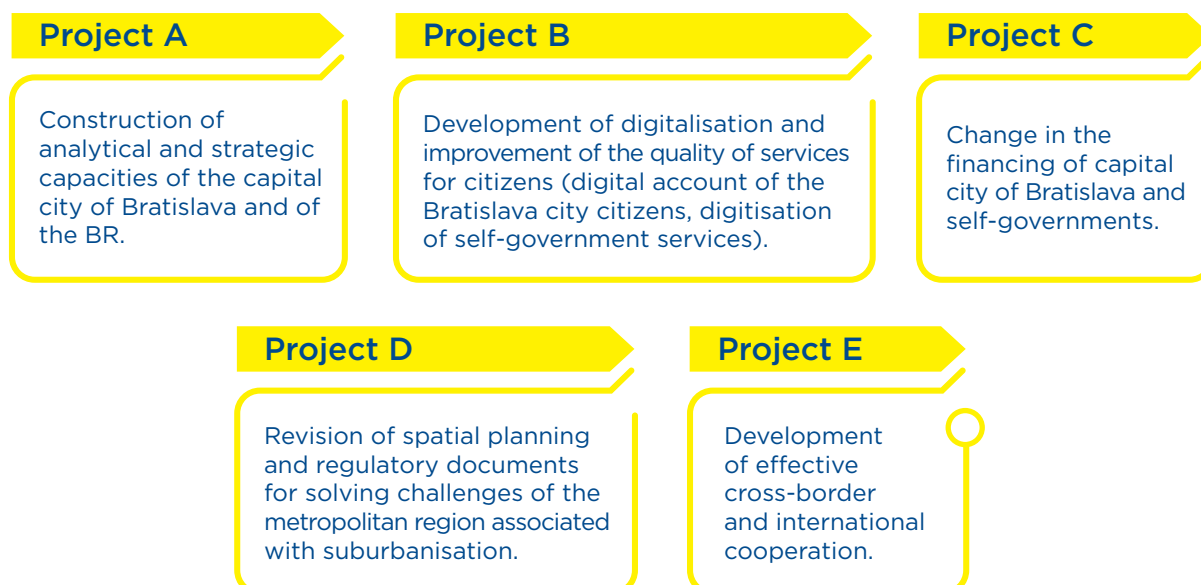
Reasons for the high regional GDP:

- high number of unregistered inhabitants and strong migration flows of inhabitants commuting for work from other regions;
- regional GDP also includes the activities of companies with headquarters located in the capital, which are carried out in other regions;
- concentration of the headquarters of international companies and the associated outflow of profits abroad in the form of dividends;
- failure to take into account regional price differences while expressing purchasing power (living costs in Bratislava are much higher, mainly due to higher prices of housing and some services).

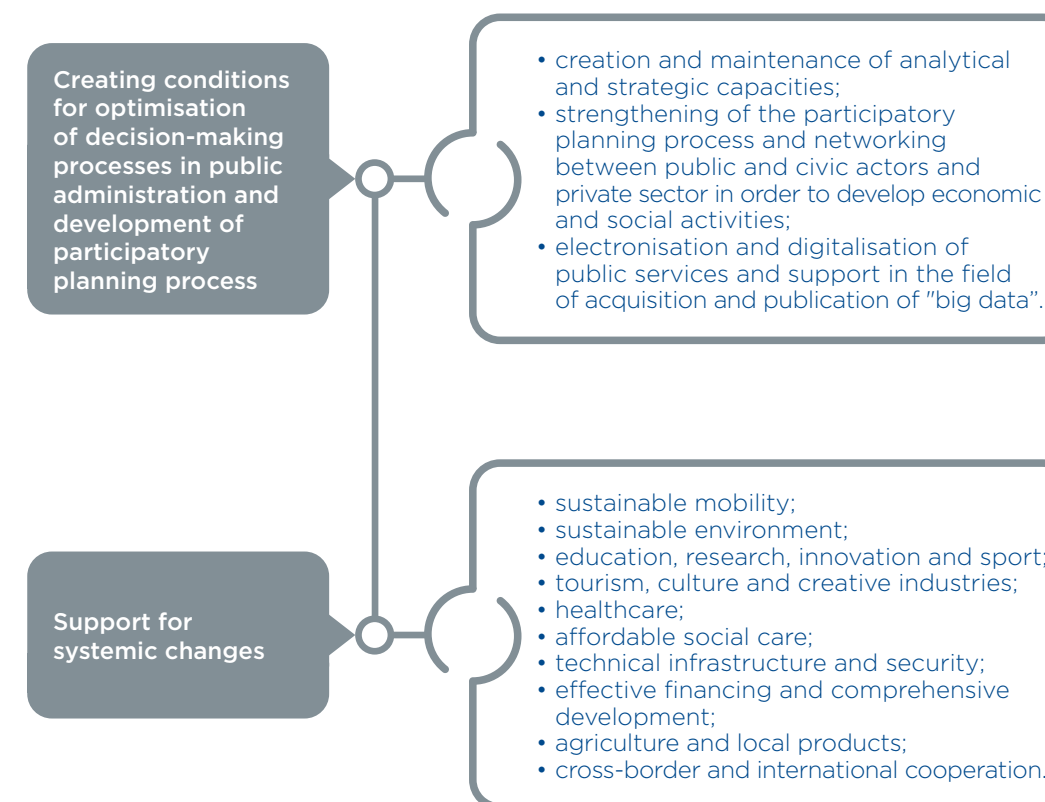
Based on the EU Social Progress Index (EU SPI), which examines social and economic indicators, the BR ranked **126th out of the 240 surveyed regions** at the NUTS 2 level.



Key projects and activities within priority







Strategic investment packages and integrated project packages



Notes



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