



DERREG

Developing Europe's Rural
Regions in the Era of
Globalization



CASE STUDY CONTEXTUAL REPORT 7



Pomurska

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WP 5
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1. Introduction

1.1 Location and Geography

Pomurska (traditionally known as *Pomurje*) statistical region is Slovenia's most north-eastern region and shares international borders with Austria to the north-west, Croatia to the south and a long eastern border with Hungary (figures 1 and 2). Pomurska covers an area of 1337 km² or 6.6% of the national territory and is the largest agricultural region in Slovenia, with extensive flat plains on either side of the central Mura River providing fertile soils and a continental climate suited to arable farming. The region is therefore intensively cultivated, with field crops covering more than three quarters of the total utilised agricultural area in Pomurska, or twice as much as the national average. There are also wine-growing hills along the Hungarian border near Lendava, while the southern and western parts of the region extend into the wine-growing hills around Slovenske gorice.¹

Some limited non-agricultural areas exist, with the immediate floodplain of the Mura River containing a forested area rich in biodiversity, while poor quality soils in the hilly northern area of Goričko on the Hungarian border mean it remains sparsely populated and underdeveloped. Pomurska's border location has historically shaped the region in distinctive ways, with the area east of the Mura River having been part of Hungary until the end of WWI. As such, the region has a large minority Hungarian population and retains close links to both Hungary and Austria. However, Pomurska's isolated geographical position and poor transport connections have contributed to particular socio-economic conditions experienced in the region, including low average wages, high unemployment and low levels of population growth due to out-migration.



Figure 1: Location of Slovenia in Europe

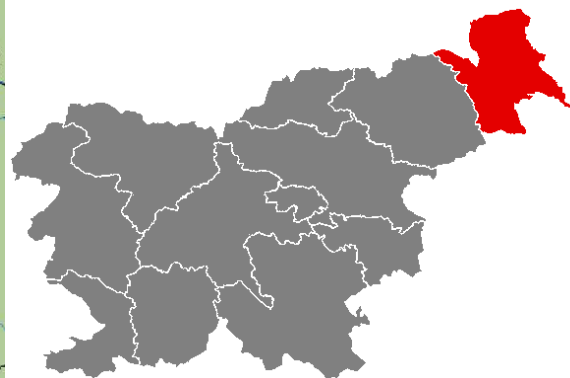


Figure 2: Location of Pomurska in Slovenia²

In 2009, the population of the Pomurska region was 119,537 giving an average population density of 89.4 persons per km² and placing it as the 5th most densely populated of the ten DERREG case study regions³. Pomurska is categorized by Eurostat as 'predominantly rural', with the centrally located town of Murska Sobota the region's largest settlement with 13,857 inhabitants (figure 3). As such, it plays an important role as both the municipal and regional centre with administrative and judicial functions located there, as well as numerous firms and business functions, banks, schools, trade centers, health and cultural institutions. After Murska Sobota, the most important settlements are the towns of Gornja Radgona (3,300

¹ Source: http://circa.europa.eu/irc/dsis/regportraits/info/data/en/si001_geo.htm

² Source: Wikipedia Commons. Available at: <http://en.wikipedia.org/wiki/File:Slovenian-regions-pomurska.png>

³ Source: Eurostat

inhabitants), Ljutomer (3,400) and Lendava (3,400), whilst the population is more generally dispersed amongst a large number of smaller towns and village settlements.⁴

Pomurska has a dense regional road network, yet poor transport connections both with the rest of Slovenia and with neighbouring countries have historically limited the region's economic potential and compounded its peripherality. This is reflected by a low score of 7,120 on ESPON's accessibility index; the second lowest out of DERREG case study regions after Alytus. This situation has recently improved, however, with the construction of 35km of motorway between 2007 and 2009 in order to provide faster connections between the regional centre Murska Sobota and central parts of Slovenia to the west, including Ljubljana (2.5 hours), as well as east to Budapest (3 hours) in neighbouring Hungary (figure 3). This supplements the region's single track rail network covering the same route, as well as providing limited connections north into Austria and south to Croatia. Similarly, pre-existing road connections into those latter two countries have enabled people to undertake a daily cross-border work commute during recent decades. There are no commercial passenger airports in the region, with the nearest in Maribor and Graz in Austria.

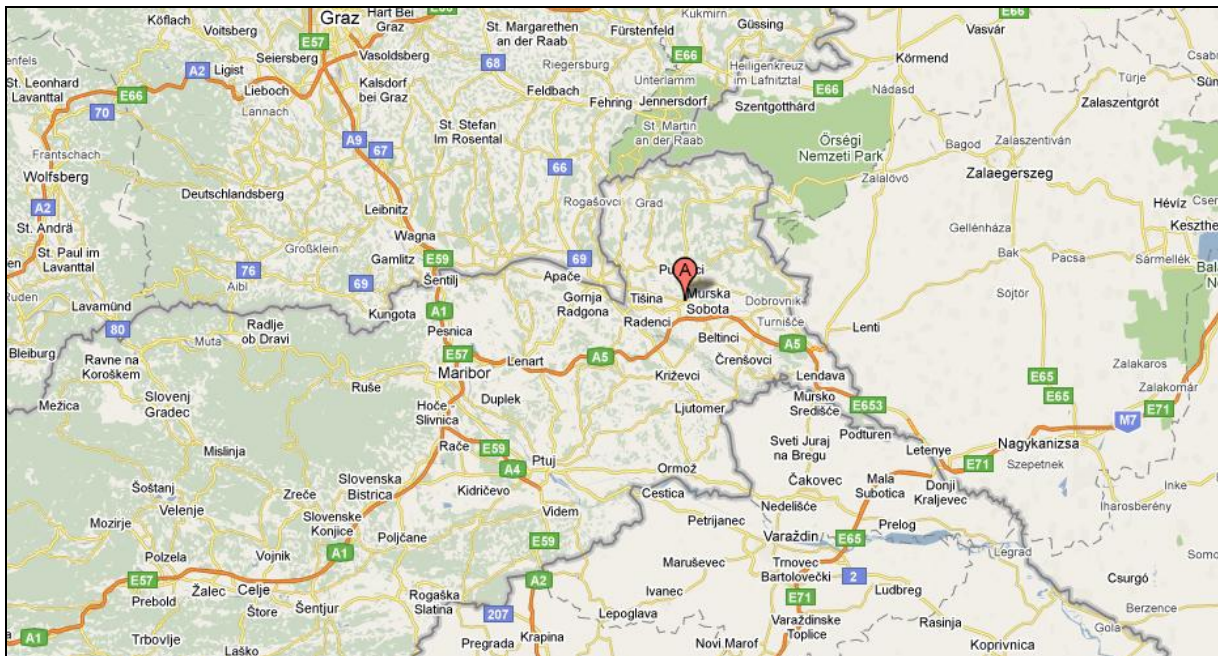


Figure 3: Major towns and road transport connections from Pomurska. Source: Google Earth

1.2 Government and Politics

Pomurska is one of 12 statistical regions (NUTS 3 level) into which Slovenia has been subdivided since 1995 for legal and statistical purposes, but with no administrative basis. Due to the size of its population (around 2 million people), Slovenia is considered a single region at the NUTS 1 level. However, for the purposes of cohesion policy two NUTS 2 regions were established on January 1st 2008, Eastern Slovenia (*Vzhodna Slovenija*) and Western Slovenia (*Zahodna Slovenija*), within which the 12 NUTS 3 regions are grouped. Pomurska, along with Podravska, Koroška, Savinjska, Zasavska, Spodnjeposavska, Jugovzhodna Slovenija and Notranjsko-kraška regions are grouped in *Vzhodna Slovenija*

⁴ Source: Statistical Office of the Republic of Slovenia

(table 1).⁵ The Pomurska region is further subdivided into 27 municipalities, each of which is named after its principal town (figure 4).



Figure 4: Municipalities of Pomurska

NUTS 1	NUTS 2	NUTS 3	LAU 1	LAU 2
Slovenia	Vzhodna Slovenija (Eastern Slovenia)	Pomurska	n/a	27 municipalities: Apače, Beltinci, Cankova, Črenšovci, Dobrovnik, Gornja Radgona, Gornji Petrovci, Grad, Hodoš, Kobilje, Krizevci, Kuzma, Lendava, Ljutomer, Moravske Toplice, Murska Sobota, Odranci, Puconci, Radenci, Razkrižje, Rogašovci, Sveti Jurij ob Ščavnici, Šalovci, Tišina, Turnišče, Velika Polana and Verzej.

Table 1: Hierarchy of administrative/statistical units for Pomurska statistical region

Historically, the political and economic development of Pomurska has been influenced by wider political processes, with the establishment of the new border between Yugoslavia and Hungary following WWI cutting off its important connections to the east for employment and trade. This became more solid following the split between the former Federal Republic of Yugoslavia and the USSR in 1948, with the drawing of the Iron Curtain along Hungary's borders further exacerbating Pomurska's economically and politically peripheral location within Slovenia. The consequences of this isolation have continued following Slovenian independence in 1991 and the resumption of cross-border trade.

Slovenian Government has traditionally been based around a two-tiered structure between the national and local/municipal level. However, with the establishment of the new statistical regions of Slovenia in 1995, there is a growing emphasis on regional policy and development initiatives. Since the breakup of the former Yugoslavia in 1991, Slovenia has instituted a multi-party, democratic political system. Within the Government of the Republic of Slovenia (RS), power is shared between a directly elected president, a prime minister, and two legislative chambers, with the 90-member National Assembly taking the lead on virtually

⁵ Source: National Strategic Reference Framework- NSRF, 2007, p.15. Available at: www.svlr.gov.si/fileadmin/svlrsp.gov.si/pageuploads/KOHEZIJA/Programski_dokumenti/NSRF_Slovenia_18_06_07_Unoff_eng_trasl.pdf

all legislative issues. The Government proposes legislation, the state budget and national programmes.

The Local Self-Government Act stipulates that a municipality is the basic self-governing local community, with the authority to manage the municipality's assets, facilitate conditions for economic development, plan spatial development, create conditions for building dwellings, manage local public services, establish primary and nursery schools, and build and maintain local roads. The authorities of a municipality comprise a directly-elected mayor, a municipal council and a supervisory committee; with the municipal council being the highest decision-making body. Municipalities are generally defined as having at least 5,000 inhabitants (20,000 in an urban municipality), but can have as few as 2,000 if the circumstances warrant it. In mid-2009, 110 out of Slovenia's 210 municipalities had fewer than 5,000 people (12 with fewer than 2,000), with a review by regions showing Pomurska to have the largest number of municipalities with fewer than 5,000 people; around 70% did not meet the population criterion.

In local elections held in municipalities within the Pomurska region in 2006, just under half of elected mayors were independent candidates while of the remainder those affiliated with right-leaning parties generally dominated with the conservative Slovenian People's Party dominating. This reflects the traditional right-wing political bias of rural areas in Slovenia (table 2).

Political parties	No. of mayors from Pomurska region
SDS – Slovenian democratic party	3
Nsi – New Slovenia – Christian peoples party	2
SLS – Slovenian peoples party	7
LDS – Liberal democracy of Slovenia	2
SD – Social democrats	1
independent candidate	12
NSD – National party of labor	0
Sum	27

Left leaning parties: LDS, SD, NSD
 Right leaning parties: SDS, Nsi, SLS

Table 2: Results from municipal government elections within Pomurska region, 2006.

There is an active civil society in the Pomurska region primarily organised through local municipalities, with the largest number of groups (40 clubs) being those related to cultural issues (cultural heritage, language and traditions). These are followed by sport clubs and associations (more than 20), environmental (about 22) and educational forums (about 21), tourism clubs (more than 18), social care and health associations (about 16), youth clubs (15) and clubs that are oriented into development issues (14). The Local Development Foundation for Pomurje (*Lokalna razvojna fundacija za Pomurje*) acts as an umbrella body for civil society groups in the region, collecting data, supporting networking and promoting various EU and national funding opportunities.

2. The Regional Economy

2.1 Economic History

Pomurska has historically been positioned at the heart of Slovenia's agricultural economy, with the region having the largest proportion of cultivated arable land in the country. Apart from wheat and sugar beet cultivation, fodder crops have mostly been grown which form the basis for dairy farming and pig breeding. Pomurska also lies within Slovenia's largest wine growing region of Podravje. In addition, a relatively strong food-processing industry has

developed, located mainly in Murska Sobota, Gornja Radgona and Lendava, with close links with the region's agriculture (flour mills, meat and milk products). However, the latter has faced recent difficulties with the introduction of free trade under the CEFTA agreement and then following Slovenia's entry to the EU in 2004; opening up local markets to imported goods.⁶

After World War II, industry was established in towns on the plains and focused around manufacturing textiles and footwear. In general, Pomurska's economy was not severely affected by the transition from centrally planned to a market economy following independence. During the past decade all sectors of the economy have experienced growth in terms of their Gross Value Added (GVA), with agriculture increasing by 10.6%, industry by 46.8% and services by 56.5% between 1996 and 2005 (figure 5). In terms of their share of the regional GVA, this has remained fairly constant with a 3% increase in the proportion of GVA contributed by the service sector over this time period accounted for by a comparable decrease in the agricultural share. However, the Pomurska's economy has lagged behind other parts of Slovenia due to its orientation towards sectors with low capital investment (food production and other labour-intensive industries), leading to below average service sector growth and a lack of entrepreneurial activity, as well as the out-migration of skilled workers to other regions.

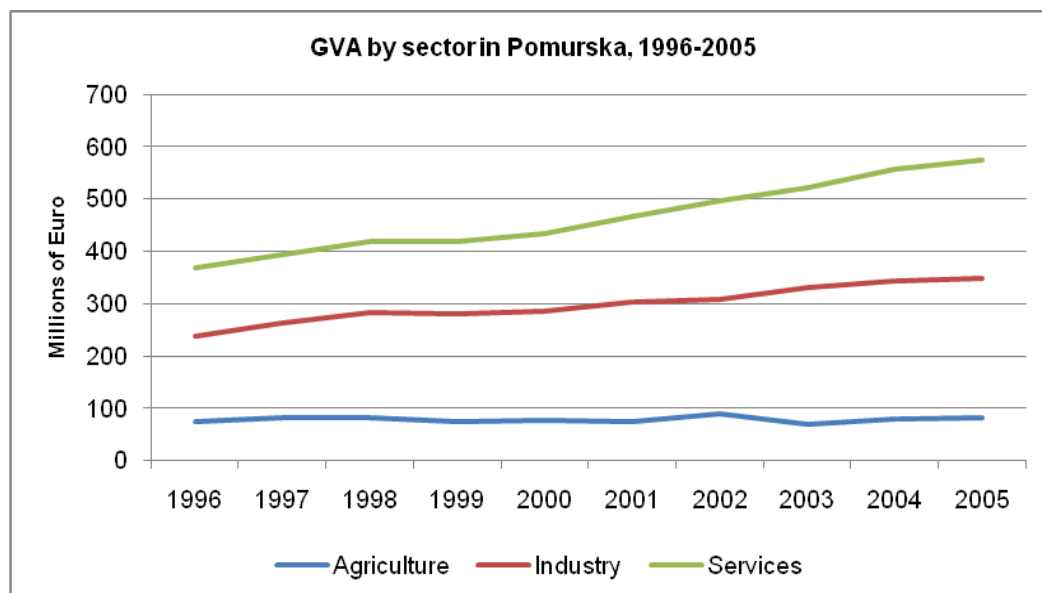


Figure 5: Gross Value Added (GVA) by sector in Pomurska, 1996-2005. Source: Eurostat

Overall levels of employment have remained relatively static over the past decade, with a small increase of 3.7% or 1,514 employed persons between 1997 and 2007 (figure 6). This overall increase is accounted for by increases in both service (+9.6%) and agricultural (+26.2%) employment, while employment in industrial occupations declined over this period from 18,392 to 16,952 persons (7.2%).

The region's geographical location and poor traffic connections (up to 2008) have further limited its economic competitiveness and prosperity, which is reflected in its low GDP per capita of €10,200 in 2006. This represents a 70% increase from €6000 in 1995 (figure 7), yet remains the lowest GDP across Slovenia's 12 statistical regions and the 3rd lowest out of the DERREG case study regions. While this 2006 figure is also less than 50% of the EU

⁶ Source: http://circa.europa.eu/irc/dsis/regportraits/info/data/en/si001_geo.htm

average, it does compare more favorably against the average GDP per capita for other EU 'New Member States' from 2004 of €9558.⁷

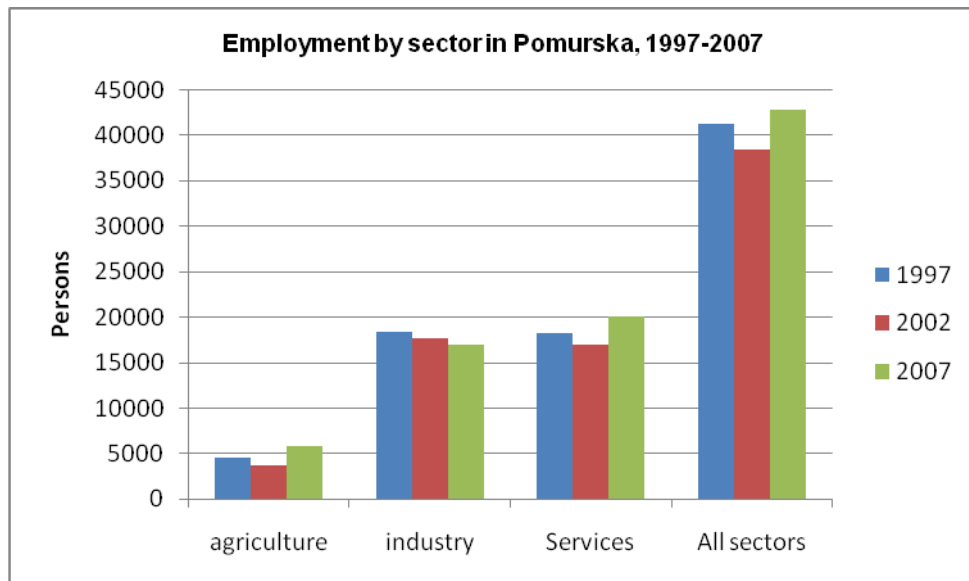


Figure 6: Employment by sector in Pomurska region for the years 1997, 2002 and 2007. Source: Statistical Office of Republic of Slovenia

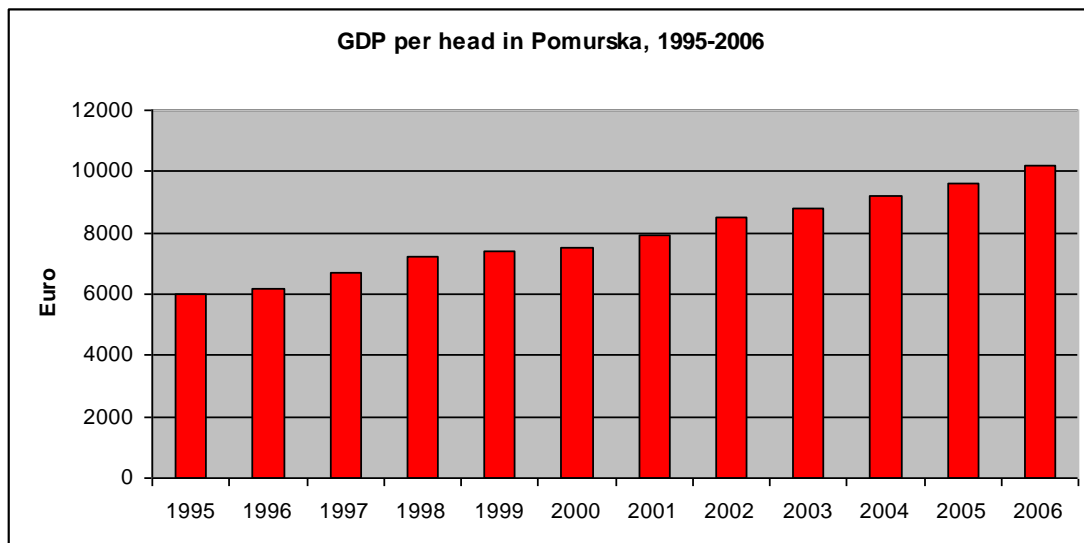


Figure 7: GDP per head in Pomurska, 1995-2006. Source: Eurostat

2.2 Present Economic and Employment Structure

The service sector is now the largest sector of the Pomurska economy in terms of contribution to GVA and employment, but there is also a strong industrial sector and larger than average agricultural sector. The 2001 census reported that 42% of the working population of Pomurska were employed in the service sector, compared to 39% in industry

⁷ Source: Eurostat

and 10% in agriculture.⁸ However, figures from 2004 quoted by the Statistical Office of the Republic of Slovenia put employment in industry at 44.8%, service sector employment at 41.2%, and agricultural employment at 14.0%.⁹ The discrepancy may reflect different data for workforce and for resident population, but collectively the statistics point to the close balance of industry and services, and the continuing importance of agriculture. The share of agricultural employment in Pomurska is the highest in Slovenia and the highest across the ten DERREG case study regions.

In contrast, service sector employment in Pomurska is the lowest of the DERREG case study regions, and the lowest in Slovenia. Although services contributed the majority of regional GVA in 2005 (57%, compared with 35% from industry and 8% from agriculture), the service sector in Pomurska remains comparatively under-developed. Pomurska does, however, have a relatively strong tourism sector based on the region's abundant natural mineral and thermal water sources, with health resorts developing in Radenci, Moravske Toplice, Lendava and Banovci. In terms of industry, the labour-intensive textiles had continued to be most significant, with some activity in other industrial sectors including chemical industries, metal manufacturing and electronics. However, this situation has recently altered with the collapse of the large Mura textile factory in 2009. Low capital investment generated by these industries and a large but not fully productive agricultural sector due to small-scale farming practices, mean that Pomurska remains economically peripheral within Slovenia contributing only 3.9% of the national GVA in 2005.

This is reflected in average wages per employee which are the lowest in the country, reaching only 83 % of the national average between 2004 and 2007, (Pavlin, B., 2009), and a long-term rate of high unemployment which was the highest in Slovenia in 2009 at 14.4% or 7,980 persons (6.6% higher than the national average).¹⁰ This rate had decreased slightly in recent years, from 18.5% in 2005, yet the region's economic and social difficulties were exacerbated by the closure of the region's largest textile firm, Mura, at the end of 2009, leading to the loss of 2,600 jobs and pushing the regional unemployment rate to over 20%.¹¹ The unemployment rate for women is over 5% higher than the rate for men.¹² More than 8% of the working-age population in Pomurska had been unemployed for more than a year in 2004 – again the highest rate in Slovenia. Nearly a tenth (9.3%) of Pomurska residents were in receipt of financial social assistance from the state in 2004, considerably more than in any other Slovene region.¹³

The low income levels also reflect the preponderance of low-grade manual occupations. In 2001, 28% of the region's workforce were employed in semi- and un-skilled manual work, with a further one-fifth apiece employed in skilled manual or craft occupations and clerical and non-manual (service) occupations (table 3).

⁸ Source: Eurostat. Note, these figures do not add up to 100% and may not include construction as part of industrial employment.

⁹ Source: Slovene Regions in Figures, 2006.

¹⁰ Source: Statistical Office of the Republic of Slovenia

¹¹ Ibid

¹² Source: Slovene Regions in Figures, 2006.

¹³ Ibid.

	Number	%
Senior officer and managers	967	2.0%
Professionals	3892	8.0%
Professional and managerial occupations	4859	9.9%
Technical and associate professionals	6158	12.6%
Clerical and secretarial workers	3183	6.5%
Service and retail workers	5824	11.9%
Clerical and non-manual occupations	9007	18.4%
Skilled agriculture and fishery workers	4296	8.8%
Craft and related trade workers	5935	12.1%
Skilled manual and craft occupations	10231	20.9%
Plant and machine operators and assemblers	9351	19.1%
Elementary occupations	4345	8.9%
Semi- and un- skilled manual work	13696	28.0%
Armed Forces	416	0.9%
Not described	4498	9.2%
Total workforce	48865	

Table 3: Occupational Structure of the Pomurska labour market, 2001
(Source: Eurostat)

In 2007, there were 4,167 enterprises in Pomurska which accounted for just 4% of the total number of enterprises across Slovenia and less than half of the average number per statistical region. Non-agricultural private sector enterprises in Pomurska contributed only 2.4% of total turnover in industry and the private service sector in Slovenia in 2004.¹⁴ At the same time, there are some signs of business growth in Pomurska in recent years, with the number of enterprises having increased in number by 323 units since 2003. This is reflected in figures for enterprise start-ups and closures from 2006, when start-ups exceeded closures by 404 to 254.¹⁵

The largest centre of employment is the regional capital, Murska Sobota, which is home to the majority of the region's administrative functions, as well as functioning as the regional business and economic centre. Until recently, the three largest employers in Pomurska were all located in Murska Sobota, including the Mura clothing factory, Mesna industrija Pomurka meat processing plant, and Pomurske mlekarne (Pomurje Dairies). These plants employed workers from the whole Pomurska region. However both the Mesna industrija Pomurka plant and the Mura factory closed in 2009, with 250 and 2500 job losses respectively, significantly impacting on the regional economy.

Other major companies operating in the region include¹⁶:

- Panvita MIR d.d. (production and preserving of meat)
- Radenska d.d. (production of soft drinks & mineral waters and other bottled waters)
- Planika Turnišče d.o.o. (manufacture of footwear)
- Nafta - petrochem d.o.o. (manufacture of other organic basic chemicals)
- Arcont d.d. (manufacture of metal structures and parts of structures)

¹⁴ Source: Slovene Regions in Figures, 2006

¹⁵ Source: Statistical office of the Republic of Slovenia – Statistical Yearbook 2009

¹⁶ Source: <http://www.investslovenia.org/en/regions/pomurska/>

- Elrad International d.o.o. (manufacture of consumer electronics)
- Varstroj d.d. (manufacture of metal forming machinery)
- SCT TKO d.o.o. (manufacture of special-purpose machinery)
- SGP pomgrad - gradnje d.o.o. (construction of residential and non-residential buildings)
- Reflex Gornja Radgona d.o.o. (building completion and finishing)
- Varis Lendava d.d. (manufacture of concrete products for construction purposes)
- Terme 3000 d.o.o. (baths and hotels)
- Zdravilišče Radenci d.o.o. (spa and hotels)

2.3 Rural Primary Industries

As noted above, while agriculture remains an important sector within the regional economy of Pomurska, its relative significance has decreased since the mid-1990s alongside the growth of the service sector. Although agricultural GVA increased from €73.9 million in 1996 to €81.7 million in 2005, a growth of 10.6%, its share of regional GVA fell over the same period from 10.9% to 8.1%.¹⁷ At the same time, agricultural employment increased from 4,602 in 1997 to 5,807 in 2007.

In 2005, there were 9,880 farms in Pomurska and this number has marginally decreased in subsequent years to 9,794 in 2007. Small farms dominate, with 65% of those in 2005 having holdings of less than 5 hectares and only 4% with holdings of more than 20 hectares. This gives an average farm size of 6.6 hectares which is the second smallest out of the DERREG case study regions after Goriška in Slovenia. This reflects a land ownership structure dominated by small-scale part-time farmers— with 73.2% of farms having some form of non-agricultural income— which has arguably hindered the potential productivity of the region's agricultural sector.¹⁸ There are some large farm enterprises, including pig farms, located mainly in the central part of the flat plains either side of the Mura River.

The persistence of traditional farming practices is reflected in the age profile of the region's farmers, over 50% of whom are aged over 55 years and with over half of these actually over 65. At the same, just under three-tenths of farm owners are women, which is the third highest proportion of female farmers out of the DERREG case study regions after Galicia and Alytus County.¹⁹

Agricultural land covers 77,674 hectares in Pomurska in 2009 which accounts for 58% of the total regional territory. This land is of mixed quality, with 43% of farms classified as within 'less favoured areas' such as the hilly northern area of Goričko, whilst the land in the region's central plains is regarded as high quality agricultural land. Nearly three-quarters of this agricultural land is under arable production (73.4%)²⁰. Aside from some large areas of sugar beet cultivation²¹, the majority is under cereal crops including mainly wheat as well as silage corn and grain corn. These corn crops form the basis for dairy farming and pig breeding which are also important parts of the region's agricultural sector, with 20.5% of agricultural land retained as permanent grassland for the grazing of livestock.

Wine growing is also particularly important in the hilly regions of Lendavske gorice, above the town of Lendava along the Hungarian border, and Slovenske gorice near Ljutomer, as well as close to the towns of Gornja Radgona and Radenci. All three areas fall within the Podravje wine region, which is particularly known for white wine production. The Ljutomer district includes the historic Jeruzalem vineyard, which has been recorded under that name

¹⁷ Source: Eurostat

¹⁸ Source: EU Rural Development Report 2008

¹⁹ Source: Eurostat

²⁰ Source: Source: Slovenian Ministry of Agriculture, Forestry and Food (<http://www.mkgp.gov.si/en/>)

²¹ Source: http://circa.europa.eu/irc/dsis/regportraits/info/data/en/si001_geo.htm

from the time of the Crusades. Currently, the large majority of Slovenian wine is consumed domestically, although the industry has received EU funds to support international promotion. Vineyards covered 2,705 hectares or 3.5% of Pomurska’s total agricultural land in 2009, while orchards covered 2.6% (1,984 ha). The

Forests and woodland cover over one-third (34.2%) of the territory of Pomurska, mainly concentrated along the floodplain of the Mura River and in the more outlying hilly regions of Goričko along the Hungarian border. However, forestry is not a significant economic sector within the region.

2.4 Tourism

Tourism has been identified as an important growth sector in regional development plans to stimulate Pomurska’s economy and improve its position as a ‘lagging’ region. Natural landscape features provide opportunities for health tourism, hunting, hiking and wine tourism. In the period from 1997 to 2007, tourists arrivals in Pomurska nearly doubled (from 110,531 to 199,212), a faster rate of increase than for the Vzhodna Slovenija NUTS 2 region as a whole (figure 8).²² Similarly, nights spent in Pomurska rose from 518.545 in 1997, to 773.249 in 2007. Pomurska now accounts for almost a tenth of overnight stays in Slovenia.

The number of foreign tourists visiting Pomurska has also increased around 85% from 45.437 in 1997, to 83.936 in 2007. This means that just under half of all tourist visitors to Pomurska are from outside Slovenia. The large majority of these are from neighbouring Austria (70.9% of foreign tourists in 2004), with smaller numbers from Germany (11.8%), Italy (4.1%), Croatia (3.7%) and the United Kingdom (0.5%).²³ The Goričko district on the Austrian border is especially popular with international visitors, and has also become a favoured area for holiday home purchases.

Tourist attractions in Pomurska include the spa resorts of Lendava Thermal Spa, Terme 3000 in Moravske Toplice, Banovci Thermal Spa and Radenci Thermal Spa, ‘wine routes’ through the region’s vineyards, and outdoor recreational pursuits including walking, riding and cycling in the Goričko area and the Mura valley.



Figure 8: Tourist numbers visiting Vzhodna Slovenija NUTS 2 region, 2001-2007.
Source: Eurostat

²² Source: Eurostat

²³ Source: Slovene Regions in Figures, 2006

2.5 International Integration

As Slovenia's least developed region, Pomurska's integration within the international economy has thus far been limited as it undergoes processes of economic restructuring following the sunset of some of the region's labour-intensive industries. Most of the larger firms in the region are still Slovenian-owned, and although some textile production is export-oriented (the largest client of the MURA clothing factory before its closure in 2009 was the German clothing firm Hugo Boss), the food and drink industry (including wine-makers) still largely sell to the domestic market.

However, the British-based *FDI Magazine* named Pomurska as the 'most promising investment region' in this part of Europe in 2006, citing low costs and the location between Austria, Croatia and Hungary. The availability of incentives for foreign investment as part of a Slovenian government aid package for Pomurska introduced in 2010 is considered to have increased the region's attractiveness further.²⁴

Recent foreign direct investments in Pomurska include Carthago, a German manufacturer of luxury camper vans, which opened a factory at Odranci in 2008, and Austrian companies Xal (an architectural lighting manufacturer) and Saubermacher (a waste disposal company), with plants in Murska Sobota.²⁵

²⁴ Source: www.investslovenia.org/de/news-medien/e-newsletter/e-newsletter-june-2010/pomurjes-new-competitiveness

²⁵ Ibid.

3. Population and Migration

3.1 Population Development

The population of Pomurska has decreased considerably over the past two decades, falling by 11,763 people between 1990 and 2009 which represents 9% of the 1990 population (table 4). This has mainly been a natural population decrease due to high mortality and low fertility rates in the region; with data on the regional fertility rate indicating on average only 1.13 children born per one woman (aged 15 – 49) in 2007. The crude death rate has also consistently exceeded crude birth rate since 1996, with figures for 2007 being 11 and 8.2, respectively. As a result, Pomurska has the lowest annual population growth rate (-2.0%) in 2007 across Slovenia's regions, compared for instance with the Obalno-kraška region which reached a high of 16.4%.

1990	1995	1998	2000	2002	2004	2006	2009
131300	126900	125400	124800	123800	122900	122300	119,537

Table 4: Population of Pomurska, 1990-2008.
(Source: Eurostat)

This trend of natural population decrease is not sufficiently offset by in-migration to the region to prevent a trend of population decline, with the inflow of migrants from other Slovenian regions and abroad the lowest out of Slovenia's 12 regions. Between 1997 and 2007, 5,570 people moved into Pomurska compared to 6,156 who migrated out of the region, resulting in a net population loss of 586 people. Both in-migration and out-migration have peaked over the last couple of years at over 700 arrivals and departures, whilst in-migration began to marginally exceed out-migration from 2005 onwards, following Slovenia's accession to the EU (figure 9).

Over this ten-year period, 58% of in-migrants and 60% of out-migrants were internal migrants, moving into or out of other Slovenian regions and particularly the neighbouring region of Podravska, which was the source for of over 50% of domestic in-migration in 2007. The remainder of migrants were international, moving from/to another country. As such, international migration plays a significant role within Pomurska due to its border location, with the number of international in-migrants into Pomurska increasing from 84 in 1997 to 548 in 2007, whilst international out-migration increased from 87 to 463.²⁶

This regional depopulation is part of a historical trend throughout the twentieth century, which has particularly impacted in the border area of Goričko with the hardening of national borders with Austria and Hungary following WWI. The demographic trend from the 1960s on is clearly showing that the major parts of Pomurska are demographically endangered, especially areas of Goričko and Lendavske gorice where particularly strong depopulation was observed between the years 1960-1991.

²⁶ Source: Statistical Office of the Republic of Slovenia

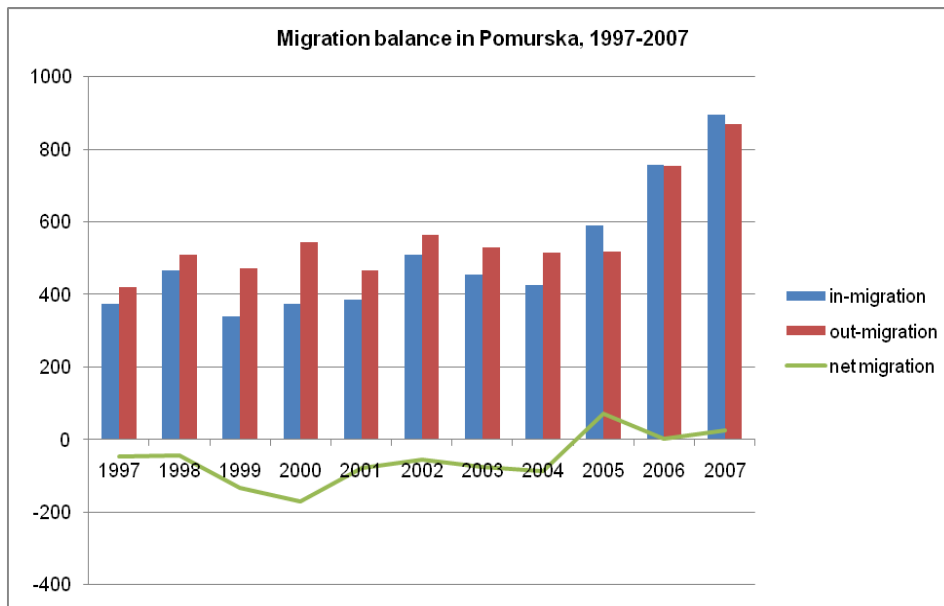


Figure 9: In-migration and out-migration to/from Pomurska, 1997-2007
Source: Statistical Office of the Republic of Slovenia

3.2 Demographic and Household Characteristics

The median age of residents in Pomurska is 34, which is the average across the ten DERREG case study regions. This is similarly reflected in the age profile of the region which is around average across the case studies, with 14.6% of the population aged 14 years and under, 10.8% aged 70 and over, and the largest demographic group being those aged between 40 and 49 years who account for 15.8% of the regional population (figure 10). However, this places Pomurska slightly above the Slovenian national average in terms of the percentage of people aged over 65 and this figure is also subject to regional variation, with the average age of the population in the border municipalities of Goričko among the highest in Slovenia.²⁷ The gender balance in Pomurska over the past decade consistently shows a higher proportion of women than men in the region's population, with there being around 0.94 men to every woman each year between 2000 and 2007, and which may be reflective of a higher proportion of economic out-migration of the region's male as opposed to female population.²⁸

Household structure in Pomurska is weighted towards larger sized households, with only 6.1% of the population living in one-person households in 2001, which is the lowest proportion out of the DERREG case study regions. Whereas, 59% of the population live in households of four persons or larger and 14.2% actually live in households with 6 persons or more, indicating the continuing importance of large family units. Near a quarter of dwellings in Pomurska are houses attached to agricultural land, and the average useable floor space of occupied dwellings is higher than for any other region in Slovenia.²⁹

Depopulation and agricultural restructuring has left many vacant buildings, with 11% of residential properties in Pomurska identified as vacant in 2001. Average property prices in Pomurska in 2008 stood at €17 per metre squared for building land and €831 per m² for an apartment. This is considerably lower than the Slovenian national average figures of €73 per m² and €1896 per m², respectively.³⁰ Although real estate transactions in Pomurska

²⁷ Source: http://circa.europa.eu/irc/dsis/regportraits/info/data/en/si001_pop.htm

²⁸ Source: Eurostat

²⁹ Source: Slovene Regions in Figures, 2006

³⁰ Source: Geodetska uprava Republike Slovenije; Poročilo o povprečnih cenah nepremičnin 2007 in 2008

increased markedly from 2004 following Slovenia's accession to the EU, over half of transactions between 2000 and 2006 were of agricultural land.³¹ The combination of the availability of cheap, often vacant, rural properties and increased accessibility following EU membership has resulted in a growing number of properties bought as second- or holiday-homes, including by foreign purchasers. In 2001, 5.7% of residential properties in Pomurska were recorded as second homes, and this proportion is likely to be significantly higher now.

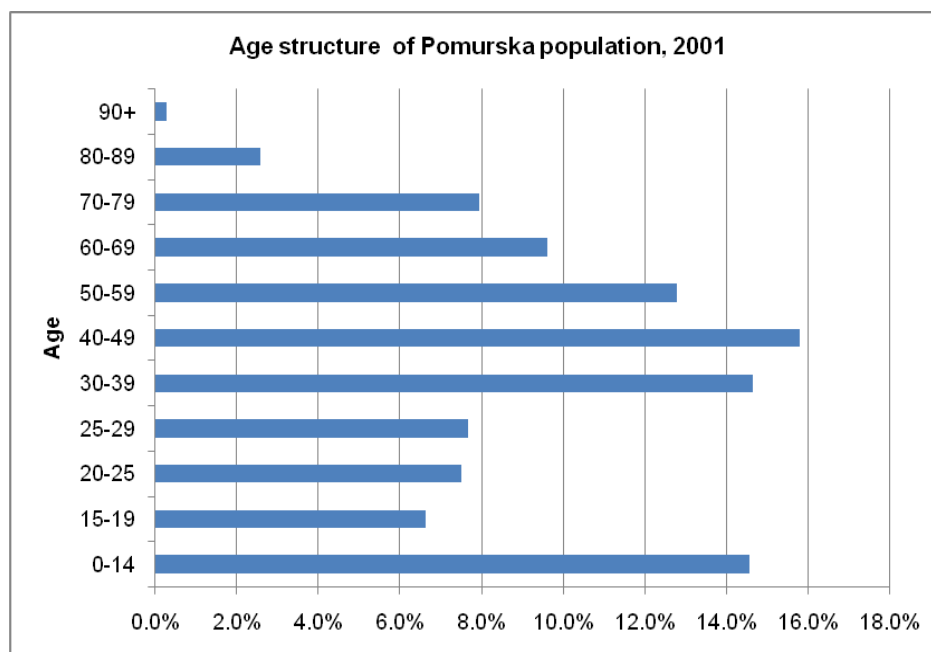


Figure 10: Age Structure of the population of the Pomurska region, 2001.
Source: Eurostat

3.3 Non-national Residents

As a border region, Pomurska has a heterogeneous population and continues to be home to a large ethnic Hungarian population, concentrated in the *Prekmurje* district east of the Mura River. The *Prekmurje* district was part of the Kingdom of Hungary until 1919, when it was annexed to the Kingdom of Yugoslavia following the break-up of the Austro-Hungarian Empire. In 1910, over 90% of the district's population were Hungarian, some 14,354 people. However, the Hungarian majority of the district was diluted over subsequent decades by casualties in both world wars, out-migration and the in-migration of Slovenes and other non-Hungarians³². Yet, in spite of these trends, there were still some 6,237 first-language Hungarian speakers in *Prekmurje* in 2002, representing 49.1% of the population. Hungarian and Slovenian are both recognised as official languages in municipalities in the district, and the rights of the Hungarian minority are constitutionally protected.

Pomurska also has a small population of Romani peoples, primarily in villages in the central part of the region, but compared with other regions in Slovenia it received relatively few settlers from other parts of the former Yugoslavia (Croats, Serbs and Bosnians). As such, only 2.3% of the region's population in 2002 was of neither Slovene nor Hungarian origin, and there were only 4728 foreign citizens resident in 2001 (3.9% of the population). Both of these figures are considerably lower than for the national population of Slovenia.

The number of foreign citizens resident in Pomurska has increased since EU membership in 2004, driven by two countervailing dynamics. First, EU citizens, notably Britons, Germans

³¹ Source: Drobne et al. (2009)

³² Source: Kovács (2006)

and Austrians, have bought properties in Pomurska both as permanent and part-time homes. Between 2004 and 2008, foreign citizens bought 618 houses in Pomurska, mainly in the Goričko district and especially around the spa town of Moravske Toplice.³³ Analysis of house purchases by foreigners in 2007 showed the largest source of buyers to be Britain (24, or 66%), followed by Austria (3), Italy (3), Germany, Belgium, Canada and the Netherlands. The average price of a house purchased by a foreign buyer was €52,000.³⁴ Sales to foreign buyers were reported to drop significantly in 2008.

Second, there has been an influx of migrant workers from outside the EU, especially from the former Yugoslavia. The number of foreigners issued with temporary and permanent work permits in Pomurska increased over the past decade, from 650 in 1999 to a peak of 1756 in 2007, before falling back to 1400 in 2008. Of those issued with permanent permits in 2006, the largest proportions were from the former Yugoslav countries of Croatia (36%), Macedonia (18%) and Bosnia and Herzegovina (17%), followed by Germany (6%) and Hungary (5%).³⁵

4. Environment and Sustainable Development

4.1 The Regional Environment

The environment of Pomurska is characterised by agricultural production, with expansive plains on either side of the north-south flowing Mura River providing fertile soils and a continental climate suited to arable farming. The Mura River floodplain is a densely forested area rich in biodiversity. Away from the plains, wine-growing hills rise in the east along the Hungarian border near Lendava, while the southern and western parts of the region extend into the wine-growing hills around Slovenske gorice. In contrast, agricultural conditions are less favourable in the hilly northern area of Goričko on the Hungarian border.

Agricultural land covered 77,674 hectares in Pomurska in 2009 which accounts for just over 58% of the total regional territory.³⁶ This includes 15,899 hectares of permanent grassland, 57,015 hectares of arable land, and 2,705 hectares of vineyards and 1,984 hectares of orchards. Forests and woodland cover 45,703 hectares or just over one-third (34.2%) of the total territory of Goriška, while built-up areas cover 8,803 hectares (6.6%) and water bodies 1,133 hectares (0.8%), including the central Mura River. The distribution of some of these agricultural land use types has fluctuated slightly since 2002, with small decreases in arable land (-6%) and vineyards (-7%) offset by a growth in permanent grassland and other permanent crops. As such, the region is classified by the European Environment Agency as a primarily a rural mosaic and pasture landscape type, with some areas of composite landscape and dispersed urban areas.

4.2 Protected Areas

Pomurska does not contain any designated national parks, with Slovenia's only one being the Triglav National Park located in Julian Alps in the north-west of the country. However, the region does contain several other types of nationally and internationally designated protected areas, with 9 European Natura 2000 sites in the region (6 Special Areas of Conservation (SACs) and 3 Special Protection Areas (SPAs)), covering an area of 61,354 hectares.³⁷ Additionally, there are 4 landscape parks covering 47,792 hectares of the regional territory. These are areas proposed by the environment ministry or by local authorities as having intrinsic natural value, but also where the influence of people shaping, maintaining and caring for the environment is evident. In Pomurska, such areas include the

³³ Source: Statistical Office of the Republic of Slovenia

³⁴ Source: Pavlin (2009)

³⁵ Data provided by Slovenian partners at University of Ljubljana

³⁶ Source: Slovenian Ministry of Agriculture, Forestry and Food (<http://www.mkgp.gov.si/en/>)

³⁷ Source: Slovenian Ministry for environment and spatial planning, 2009

Goričko Landscape Park located close to the Hungarian border, with the parks headquarters in the village of Grad, which contains a mix of cultivated and uncultivated areas enjoyed by cyclists and hikers. It is also home to many traditional craft workers involved in making wicker roofing, weaving products from corn leaves, pottery, blacksmithing and crocheting.



Figure 11: Lowland agricultural landscape in the Dolinsko area of Pomurska, close to the border with Hungary. Source: Wikipedia Commons.

4.3 Sustainable Development

In order to address some of the multiple problems related to Pomurska's peripheral position as a 'lagging' region within Slovenia, regional development programmes have largely been directed towards promoting economic growth through restructuring existing industry, improving the effectiveness of agriculture and promoting the development of human resources. As a result, the prioritization of sustainable development initiatives within these development programmes has been uneven.

Organic farming practices have grown across Slovenia as a whole over the past decade, yet in Pomurska the take-up of organic farming is less developed than in other areas of the country. For example, in 2008, there were 1,789 certified organic farms in Slovenia accounting for approximately 5 % of the total utilised agricultural area. Only 2.9% of these holdings were located in Pomurska despite being one of the country's main agricultural regions, amounting to 549.6 hectares or just 0.7% of agricultural land in Pomurska being under certified organic production.³⁸

At the same time, a major local food marketing and processing initiative is based in the region called Pantiva. This is a consortium of companies manufacturing ecological (not necessarily organic) food products (grain crops, fruit and vegetables, wine production, livestock and meat products) which are sold throughout Slovenia. The consortium were involved in the construction of a biogas power station near one of their pig farms in Nemščak, which utilises organic waste to produce electricity for use both at the farm site and fed into the national grid.³⁹ Renewable biogas is a main source of energy production in Pomurska, with the country's largest 7.2 MW output biogas power station based at Lendava and an additional plant in Logarovci.

Indeed, renewable sources meet 34% of Pomurska's energy demand, mostly from biomass. There is considerable potential to expand wood biomass energy production in the region,

³⁸ Source: Slovenian Ministry for Agriculture, 2009

³⁹ Source: <http://www.greenlabelspurchase.net/Panvita.html>

utilising Slovenia's extensive forest resources. An initiative to promote conversion to biomass energy is being led in Pomurska by the Sinergija Development Agency.⁴⁰ The development of geothermal energy has also been identified as a priority for Pomurska by the Slovenian government.

4.4 Environmental Issues

A major environmental concern in the Pomurska region is with the water supply, with shortages experienced in hilly areas whilst intensive conventional agricultural practices in the lowland plains have resulted in the pollution of underground water sources. There are also therefore related problems with sewage. Addressing these issues of water pollution as well as regulating waste treatment has been recognized as a regional development priority within Pomurska. Other specific concerns relate to the impact on the environmental and biodiversity caused by regional economic and development activities, including intensive farming, the planned development of new hydroelectric power plants on the Mura River, gravel pits at the Mura, road construction and increased traffic pollution, and the over-consumption of natural resources by the local population.

5. Regional Development and Innovation

5.1 Regional Development Programmes

Due to the relatively small size of its population (approx 2 million), Slovenia hasn't traditionally had a specific regional focus in terms of development policy, which has largely been led by national government. However, accession to the European Union has stimulated the application of both spatial planning and regional development approaches in Slovenia, and the creation of a regional structure with two NUTS 2 cohesion regions (*Vzhodna Slovenija* and *Zahodna Slovenija*) and 12 statistical regions. The Slovenian Development Strategy for 2006-2013 identifies the need for more coherent regional development, which would help address current geographical variations in development level. For example, in the National Development Programme for the financial perspective (2007–2013), the government plans the development of several regional business-infrastructure-technology centres, where, besides the development of the necessary business infrastructure, there is also envisaged the development of R&D and innovation facilitators. This corresponds with the planned decentralisation of higher education as well as the decentralisation of R&D resources.

Since the accession of Slovenia to the European Union in 2004, the country as a whole has been in receipt of support from the European Regional Development Fund (ERDF), with an allocation of €438.7 million from EU and Cohesion funds for the period 2004-2006. This funding was particularly targeted towards underdeveloped regions, with Pomurska receiving a significant share of €55.7 million (13% of the total allocation).

For the 2007-2013 Structural Funds programme, the whole of Slovenia was identified as a Convergence Region and was eligible in receipt of support from the ERDF through two main operational programmes; firstly, 'Strengthening Regional Development Potentials' (€1.71 billion from the ERDF and €301.7 million in match funding from Slovenian national authorities) which aims to "enhance competitiveness, foster entrepreneurship, innovation and technology development, and facilitate job creation, including in the tourism sector while taking into account environmental and social concerns", and secondly, 'Development of environment and transport infrastructure' (€1.41 billion from the ERDF and €288.6 million from Slovenia).⁴¹ Slovenia will also benefit from EU Structural Funds delivered through transnational programmes with Italy, Austria and Hungary. A detailed regional breakdown of

⁴⁰ Source: 'Biomass sector in the Pomurska region, Slovenia', Sinergija Development Agency 2008

⁴¹ Source: EC Regional Policy (http://ec.europa.eu/regional_policy/country/)

these Structural Funds programmes is unavailable, with data only for the priority 1 axis of regional development showing that the Pomurska region received approximately €70 million.

For the 2007-2013 programme period, the EU's LEADER scheme was also incorporated into Slovenia's national and regional development programmes alongside a range of other rural development programmes. Currently, 33 Local Development Strategies exist across the country, based on the partnerships formed around the corresponding 33 Local Action Groups (LAGs). The Pomurska region 3 has operating LAG's; LAG Goričko, LAG Prlekija and LAG 'Of good people'. The regional development agencies have also played a vital role for more than a decade, with the leading one in the region being the Regional Development Agency Mura (*Regionalna razvojna agencija Mura*).

In 2009 the Slovenian parliament passed the Pomurje Aid Law to introduce an emergency assistance package for the Pomurska region following the closure of the MURA textiles factory. The programme includes a series of measures, with total funds of €30 million for the period 2010 to 2015, and aims to attract new investment to the region and create around 1,000 jobs. Specific measures include a fund of €7.2 million for co-financing job creation projects to generate around 350 jobs, as well as initiatives to promote the region and encourage municipalities to form regional development partnerships. The programme particularly targets the development of geothermal energy and other renewable energy sources, sustainable and competitive agriculture, the food industry, and tourism.⁴²

5.2 Regional Skills-base and Infrastructure

Pomurska's peripheral location within Slovenia extends to its educational and skills infrastructure, with no universities located in the region. As a result, many students move away to study at the University of Ljubljana or the University of Maribor. The regional centre of Murska Sobota is home to the College of Economics, as well other important regional institutions including Murska Sobota General Hospital. The region's industrial sector continues to be based has also been based around labour intensive, low capital investment industries such as textiles and food processing, with limited expansion into hi-tech and knowledge industries as well as a lack of entrepreneurial activity leading to the out-migration of many skilled workers. Low wages and high levels of regional unemployment also contribute to large volumes of illegal daily work migration into Austria.

Available figures for the Vzhodna Slovenija NUTS 2 region within which Pomurska is located show that €101.7 million was invested in Research and Development activities in 2005, which is less than a third of that spent in the Vzhodna Slovenija NUTS 2 region. Research and Development activities across all sectors in Pomurska employed 91 full-time equivalent persons in 2008, which accounts for only 0.8% of R&D employment across the whole of Slovenia.⁴³ Similarly, hi-tech employment in Vzhodna Slovenija accounts for 2.74% of the total regional employment, which is the second lowest across comparative NUTS 2 areas containing the DERREG case study regions after Galicia.⁴⁴ However, recent initiatives to encourage business sector growth and diversification include the establishment in 2008 of the Pomurski tehnološki park (Pomurje Technology Park; formerly Pomurje Business Incubator), with a focus on encouraging research and development activities and expansion into foreign markets in sectors including bio-technology, fashion and design, ICT technologies, and environmental and renewable energy technologies. The technological infrastructure in Pomurska is improving but lags behind other Slovenian regions, with 44 % of households having Internet access in 2005 compared to the national average of 56% (increasing to 64% in 2009).⁴⁵

⁴² Source: www.sta.si/en/vest.php?id=1477034

⁴³ Source: Statistical office of the Republic of Slovenia

⁴⁴ Source: Eurostat

⁴⁵ Source: Statistical office of the Republic of Slovenia

Data from 2008 on the educational attainment of the region's population (aged 15 and over) show that approximately 9.9% held a tertiary qualification, 53.7% had been educated to secondary or equivalent level and 33.3% to primary school level, with the remaining 2.8% having no or incomplete primary education.⁴⁶ This proportion of the population with a tertiary qualification is significantly lower than the figure of 17.5% for the whole of Slovenia, and is also the lowest out of the country's 12 statistical regions.

6. Summative Analysis

The contemporary economic, social and environmental situation of Pomurska is characterised by:

- A peripheral border location, with relatively poor transport connections, and with isolation intensified with the closure of borders during the Cold War period.
- A rural settlement pattern of small towns and villages, and a predominantly agricultural landscape, extending from mountain to flood plain.
- A traditionally dominant agricultural economy, characterised by small-scale, uneconomic farms, which has declined in importance but remains a significant employer of around one in ten of the regional workforce
- An industrial sector focused on food processing and textile manufacturing that was established in the post-war period and is largely controlled by indigenous companies, but which is facing severe economic challenges, including the closure of two major factories in 2009.
- A substantial increase in GDP per head since Slovenian independence and economic liberalisation in the 1990s, but with levels of income and prosperity that among the lowest in Slovenia, and with a high unemployment rate.
- A growing viticulture sector producing primarily for a domestic market.
- The increasing importance of tourism, based on spa tourism, wine and rural pursuits, including a substantial number of international visitors, largely from neighbouring Austria.
- A recent turnaround in population dynamics, with an historic trend of depopulation replaced by a modest balance of net in-migration after 2005, achieved in part through in-migration.
- A significant minority ethnic Hungarian community, especially in the district of *Prekmurje* which had formed part of Hungary until 1919, and which continues to be a bilingual area.
- Relatively limited regional political autonomy in a primarily centralised state, but with recent moves to introduce regional governance and spatial planning.
- The recent rolling-out of regional development strategies, notably since EU accession in 2004, with significant support from EU Structural Funds as well as an emergency aid package introduced by the Slovenian government in 2010, with an emphasis on economic diversification, inward investment and the valorisation of natural resources.

⁴⁶ Source: Statistical Yearbook 2007
(<http://www.stat.si/letopis/LetopisVsebinsa.aspx?poglavje=30&lang=en&leto=2009>)

Pomurska is the most agriculturally-focused of the DERREG case study regions, and may be categorised as a 'Traditional Agricultural Region', characterised by a declining agricultural sector, but continuing relatively high levels of employment in farming and food-processing, the predominance of small-scale farms rather than industrial agriculture, and a rural landscape dominated by farmland. As such it has commonalities with County Roscommon, among the other DERREG case study regions, but also with parts of France such as the Lot and Lot-et-Garonne départements, and some more rural areas of Britain such as Powys in mid Wales.

The impact of globalisation on Pomurska has, to date, largely come from what might be termed 'short-reach' globalisation processes – associated with transnational connections with neighbouring states and with European integration – rather than with more distant global events and influences. However, these 'short-reach' globalisation impacts have arguably contributed to social and economic restructuring that has made Pomurska more open and vulnerable to 'long-reach' globalisation processes. Notable expressions of globalisation evident in Pomurska from our initial analysis include:

- The liberalisation of borders with Austria and Hungary following the end of the Cold War and EU membership, bringing opportunities for economic cooperation, trade, tourism and population movement.
- Increased competition in domestic and international markets for the products of traditional industries, including food processing and clothing, resulting from the liberalisation of trade.
- A growth in international tourism, notably from Austria and other parts of Europe.
- International in-migration including by migrant workers (notably from other parts of the former Yugoslavia) and by full- and part-time amenity migrants from Austria, Germany and Britain.

The nature of these global or transnational relations, together with the distinctive socio-economic character of the region, creates both opportunities and vulnerabilities for future regional development. The opportunities are presented by:

- The potential to strengthen cross-border ties with Hungary and Austria, especially following the opening of the A5 motorway between Maribor and the Hungarian border in 2009, with the prospect of emulating the successful Maribor-Graz transnational corridor to the west.
- The expansion of international tourism, particularly by expanding the pool of source countries, with a focus on small-scale tourism enterprises and sustainable tourism activities in order to ensure benefits to the local economy
- The development of export markets for Slovenian wine from the Lendava, Ljutomer and Gornja Radgona vineyards.
- In the short-term, at least, foreign direct investment in manufacturing reflecting the availability of skilled factory workers and comparatively low costs of land and labour for a location within the European Union and hence with unrestricted access to the EU single market.

At the same time, however, our initial analysis suggests that regional development in Pomurska is vulnerable to both global and endogenous pressures and challenges in a number of ways. These include:

- Competition to traditional industries such as clothing from lower-cost regions such as south-east Asia.
- The law of diminishing returns, as the competitive advantages of Pomurska's location within the EU are reduced as increasing in prosperity and standards of living are reflected in higher land and labour costs.
- The challenge of managing industrial restructuring as the economic is realigned away from manufacturing industry, with a short-term impact of increased unemployment and longer-term challenge of re-skilling the workforce.
- The implications of agricultural policy reform in the EU and global liberalisation of agricultural trade on Pomurska significant but traditional farming sector, with potential social, cultural and landscape impacts as well as economic impacts.
- The unpredictable nature of the international second home market, with a dependence on cheap air travel and relative prosperity in home nations such as Britain and Germany.
- The relatively weak regional innovation system in Pomurska, with no research-active university in the region and relatively little private sector investment in research and development.

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