NEMZETSTRATÉGIAI KUTATÓINTÉZET

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Bridge2EastCE

REGIONAL DEVELOPMENT OPPORTUNITY MAP

Prepared within the framework of the **Bridge2EastCE** Project

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1. Introduction

The purpose of this paper is to support the development of the Integrated Territorial Planning Cooperation (ITPC) Framework within the Bridge2EastCE project. It aims to explore the emerging development opportunities of the European Union's easternmost Central European regions bordering Ukraine. These opportunities are primarily linked to the profound transformations that have taken place in Ukraine over the past five years. The most significant changes concern the country's geopolitical position and the resulting geoeconomic conditions, as well as its altering internal socio-economic spatial structures, the reform of local self-government, and the evolution of territorial development policies. Together, these developments have had a substantial impact on the EU's eastern border regions, affecting both their metropolitan areas and their rural territories.

These changes create new prospects for territorial development and cross-border cooperation. At the same time, however, they have also generated considerable challenges. Consequently, the current situation presents a complex combination of opportunities and risks that requires a renewed strategic approach to regional development and territorial cooperation.

The analysis builds mainly upon the comprehensive baseline assessment of the target area prepared within the Bridge2EastCE project (entitled: Comprehensive Analysis).

The target area of the current study consists of the easternmost Central-European regions of the EU along the Ukrainian border, see the table below:

Country	NUTS 2 level territorial units	NUTS 3 level territorial units
Poland	Podkarpackie	Przemyski, Krośnieński
Poland	Lubelskie	Bialski, Chełmsko-Zamojski
Slovakia	Východné Slovensko (Eastern Slovakia)	Prešovský kraj, Košický kraj
Hungary	Észak-Alföld (Northern Great Plain)	Szabolcs-Szatmár-Bereg
Romania	Nord-Vest	Satu-Mare, Maramureș

The considerations also involves the neighbouring areas of the Carpathian region (Suceava and Botoşani counties in Romania), while also addressing the adjacent Ukrainian territories situated across the border (Volyn, Lviv, Zakarpattia, Ivano-Frankivsk Oblast, Chernivtsi counties).

This paper:

- first reviews the most important recent developments in Ukraine,
- and then it assesses the opportunities and challenges arising from them for the easternmost regions of the European Union.
- After that it identifies potential strategic directions for territorial development and cooperation that respond to these changing circumstances.
- Finally, the study presents a range of development priorities and project ideas proposed by the partners of the Bridge2EastCE project,
- and a closing chapter reflects the specific needs and opportunities of the individual participating regions.

2. Regional development opportunities arising from the geoeconomical and geopolitical situation

2.1. The changing geopolitical and geoeconomical position of Ukraine

Ukraine has been placed in an extremely difficult situation following the escalation of the war in 2022. The social and economic burdens imposed by the armed conflict have had a paralysing effect on almost every aspect of the country's economic performance and social development. The devastating reality of the war defines everyday life in Ukraine, but the new geoeconomical and geopolitical situation, alongside the obvious difficulties and challenges, also presents opportunities for the country.

- Ukraine is now open only to the West. Its economic and social ties with the EU have grown significantly stronger.
- The strengthening relations with the West is taking shape not only in the form of humanitarian and financial aid, but also through development assistance, investments, technology transfer and other forms of cooperation.
- Several sectors have experienced dynamic growth over the past few years, and in certain technology-driven industries Ukrainian actors have emerged as global leaders.
- The new Ukrainian administrative and regional development reform (in line with significant decentralization efforts modelled on European examples) and the related planning obligations provide local and regional actors with an opportunity to respond effectively to the changing situation.
- Since the outbreak of the war made the western regions of Ukraine also its safest territories, a huge reorganization has been taking place in the country with a significant number of internal refugees and relocation companies moving to the Ukrainian side of the border region. The inflow of internally displaced persons has contributed to the economic dynamism of Ukraine's western regions, as many have established new businesses and invested their personal savings there. These developments have also accelerated urbanisation in several western Ukrainian cities located close to the EU border.
- Ukraine’s further European integration can stimulate cross border agglomerations and functional urban areas along the Ukrainian border.
- All of this has an impact on the economies of these regions as well, since the outbreak of the war, the economic strength of the western regions—both in absolute and relative terms—has increased.

- The western regions of Ukraine have become almost the only part of the country through which Ukraine can maintain connections with European and global economic and social networks.
- The post-war period will inevitably bring infrastructural reconstruction, social remediation, economic restructuring and accelerated EU integration of Ukraine, with many development opportunities.

2.2. Regional development opportunities of the easternmost regions of the EU arising from the geoeconomical and geopolitical situation

The changing geopolitical position of Ukraine, especially its western territories will present new opportunities to the easternmost regions of the EU as well. To leverage their strategic position as a gateway to Ukraine, unlocking their growth potential in a post-war European landscape, the easternmost regions of the EU must utilize their opportunities and capabilities.

- The target area is a unique external border region of the EU where the cross-border integration of the labour market had already begun to some extent even before the war, with significant daily and weekly border traffic. A substantial outflow of Ukrainian labour had already been evident before the outbreak of the war, with a significant share of these migrants choosing the target area as their destination.
- Regardless of national borders, certain subregions of the target area share very similar environmental and social characteristics. Similar social patterns can also be observed in the adjacent Ukrainian regions across the border.
- The European integration resulted in cross border agglomerations and functional urban areas at some parts of the easternmost European regions.
- Its significant minority communities (Hungarian, Romanian, Slovak, Polish, Ukrainian, and Roma) offer excellent opportunities for cooperation in this ethnically diverse region, which are already evident in the relationships between municipalities, in labour market relations, and investments.
- Immigration generated by the war situation, in addition to challenges, also presents labor market and economic opportunities for the affected regions. For the peripheral regions on the eastern borders of the EU, from an economic development perspective, it is of fundamental interest to retain human resources, and from a demographic perspective, to slow down the rate of population decline.
- The good practices of planning and development in some parts of the border region can set an example for development actions in the whole territory.

- Existing, successful cross-border planning and development cooperation (e.g. Planning4U), as well as other related projects in the border region also provide a good basis for further development cooperation.

3. Challenges and risks of the target area

3.1. Structural challenges

The four consecutive border sections covered by the Bridge2East partnership have many similarities in their territorial and socio-economic characteristics, hindered by multiple drivers of inner peripherality.

- Peripheral location in both EU and national terms, far from the capitals and central regions of the countries, combined with poor accessibility indicators.
- Relatively low GDP per capita either in nominal terms (5-10.000 EUR per capita) or as compared to the country averages (50-75%).
- Steadily decreasing local population resulting in major bottlenecks in local economic development, investment, deteriorating social perspective of inhabitants, combined with high immigration pressure.
- Underdeveloped public services that struggle to provide quality and attractive enough services to the local population and serve the growing immigration (e.g. health, education, social services).
- Weak multi-level and interregional governance structures (ineffective cooperation among the local, county, regional and interregional level government bodies, civil organisations and inhabitants, missing or weak cooperation networks beyond borders).

3.2. Challenges and risks arising from the geopolitical situation

In addition to the opportunities that have opened up, the new geopolitical situation has also brought numerous challenges and risks to the border region. Russia's invasion of Ukraine since 2022 have had a particularly negative impact on the region, culminating in complex socio-economic consequences, further deepening the lag of these peripheral areas in the EU and within their own country. Devastating humanitarian and economic impacts of Russia’s aggression have been added to already existing, longer-term challenges of demographic and economic decline, calling for immediate actions in focusing and coordinating resources on local, national and transnational levels.

- Since the outbreak of the Russo-Ukrainian war, the easternmost regions of the EU have faced a significant increase in the volume of immigration waves from Ukraine, primarily of a humanitarian nature. In addition to national resources,

the coordination and provision of war refugees requires significant (financial, infrastructural and human) local resources as well.

- Regional and interregional planning documents of the border region do not reflect current geoeconomical and geopolitical challenges.
- In the event of a further significant prolongation of the Russian-Ukrainian war or a possible Russian gain in power, investors may turn away from the eastern regions of the EU as well.
- In such a scenario, the risk of war-related disasters in the border region will also increase.
- Environmental risks originating in the neighbouring Ukrainian territories are considerable due to the country's less developed environmental infrastructure (particularly in waste and wastewater management), the presence of high-risk sites (e.g. former and operating nuclear facilities), and the shared transboundary water systems. The effects of climate change and the possible prolongation of the war could further increase these risks.
- Apart from planning activities carried out within European Union cross-border cooperation programmes and certain infrastructure development projects, territorial planning across the target area is rarely characterised by shared visions, common objectives, and coordinated actions that explicitly take the neighbouring side of the border into account. This applies both to cooperation among the EU's easternmost regions and to cooperation between Ukrainian regions and cities and their counterparts in the neighbouring EU Member States. The new situation created by the war, despite stimulating cross-border economic and social relations, has not yet brought about any substantial change in this respect.

4. Some development proposals based on the new opportunities and challenges

These new opportunities open up new possibilities for territorial development interventions. The following section presents several examples of such interventions.

- Long-term cross-border planning cooperation between different territorial levels on the most important common themes.
- Strategic cross-border infrastructure developments ensuring internal connectivity of the target area, linking the functional areas of the easternmost European regions.
- The development of border crossing transport infrastructure and public transport connections inside the target area, removing obstacles to cross-border diffusion of agglomeration, functional urban areas.

- Linking major urban centres in western Ukraine to the European railway and motorway networks in accordance with European standards.
- Establishment of coordinated investment policies across the entire Border Region.
- Promoting the labour market integration of refugees in these border regions facing population decline, rather than encouraging their permanent settlement in European urban centres farther away from Ukraine.
- Attracting Ukrainian businesses into the easternmost European regions.
- Developing the conditions for a gateway economy in the easternmost European regions by promoting logistics and transport investments taking into account both business and environmental aspects.
- Enhancing international economic cooperation within the framework of special economic zones on both sides of the Ukrainian border before the completed integration of Ukraine into the economic and financial structures of the European Union.
- Research and development collaborations between the region's academic and industrial actors.
- Development of environmental infrastructure (especially waste and wastewater management) also in the Ukrainian side of the border.
- Improvements in education and healthcare systems taking into account the cross border task sharing possibilities.
- Developments aimed at preserving the region's traditional social diversity, and utilizing the special resources of the ethnic and minorities (e.g. special economic networks, economic bridging role, resources in tourism and the creative economy).
- Social inclusion of Roma communities.
- Tourism and recreational developments based on cross border attractions among the easternmost regions but expanding also into the Ukraine.
- Establishing civil society partnerships throughout the border region, with a particular focus on deepening interethnic relations.
- Enhancing cross-border cooperation between the newly established local municipalities of Ukraine having an extended planning and development competencies and their counterparts in the European Union, initiating joint development planning actions.

4.1. Development proposals from some parts of the target area

To tackle the structural challenges of the easternmost regions of the EU and those arising from the geopolitical situation, as well as to utilize their opportunities and capabilities, the Bridge2East partnership compiled a number of development proposals and initiatives.

4.1.1. Prešov Self-Governing Region

- Updating Strategic and Territorial Planning Documents to Reflect War-Related Realities
- Labour Market Integration of Ukrainian Workers and Addressing Skills Underutilisation
- Housing Availability and Affordability
- Healthcare System Capacity and Integration
- Educational Infrastructure and Integration Capacity
- Border Infrastructure Modernisation and Transport Connectivity
- Strengthening Multi-Level Governance and Cross-Border Coordination Capacity
- The EU's Eastern Gateway to Ukraine
- Refugee Labour Market Integration to Address Structural Shortages
- EU Funding Leverage and Enhanced Cohesion Policy Support
- Post-War Reconstruction as an Economic Driver
- University-Based Knowledge Economy and Research Ecosystem

4.1.2. Košice Self-Governing Region

- Expansion and modernization of transport and logistics infrastructure
- Long-term refugee integration and demographic adaptation
- The establishment of the UN-Habitat Collaboration Hub
- Investments into renewable energy systems, railway electrification, sustainable freight transport, and crisis-resilient infrastructure capable of responding to future geopolitical disruptions

4.1.3. Polish Territories

- Strengthening the logistical and transport role of the border regions
- Turning security pressure into resilience and dual-use infrastructure
- Supporting economic reorientation, trade and reconstruction-related business activity
- Integrating refugees and migrants as a human-capital opportunity
- Upgrading public services, housing and local administrative capacity
- Environmental and water-management resilience
- Reframing border regions as adaptive territories

4.1.4. Satu Mare County (Romania)

- Transport, logistics, and cross-border connectivity
- Labour market pressures and migration-related opportunities
- Cross-border cooperation and EU integration instruments
- Economic restructuring and investment opportunities

- Public services, housing, and administrative capacity
- Environmental resilience and infrastructure adaptation
- Repositioning the region as a flexible border-adjacent region

4.1.5. Szabolcs-Szatmár-Bereg County (Hungary)

- Development of transport connections
- Infrastructure development at the county's border crossings (Záhony, Beregsurány, Tiszabecs)
- Logistics and railway developments
- Interreg cooperation
- Integrating refugees in labour market
- Cross border cooperation (environmental issues: river Tisza)
- Joint environmental interventions along the Tisza
- Repositioning the outer periphery (border region)
- Cooperation in post war reconstruction