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Landscape classification – Methodological approaches and proposal of the Slovakia project

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Abstract

In the years 2007-2008 a 15-members team of Slovak experts participated in elaborating a project: Landscape Typology of Slovakia – developing a methodology. The preliminary phase of the project started already in the year 2007 and the project itself was done within the Slovak Ministry of Environment's Plan of the main tasks for the year 2008. The task finished with proposing a methodology draft in April 2008 (Kozová, Hrnčiarová, Oťahel', Finka, Dvořáková et al., 2008) and now the implementation part is being prepared.
The paper describes general methodology of the project "Landscape Typology of Slovakia". The objective of the project is to propose a hierarchy of classification of the landscape in Slovakia from the supranational level up to the local level. A special emphasis is put on cultural-historical aspects although many of its traces in the landscape are just fragmental. New methods are applied for assessing direct or indirect driving forces (e. g. urban development, climate change). Practical implementation of project's outputs and understandable interpretation for public is one of the main objectives of the project.
Using example from Slovakia, the paper demonstrates that the landscape typology is not the aim, but it is a tool how to reach better management of the landscape, increase the awareness of landscape values and plan its further sustainable development.

Keywords: landscape; typology; classification; Slovakia

1. Introduction

In the last decades, classification maps, mainly typification (regional typification) of landscape have been developed at the regional level or at the level of individual countries. The importance of classification maps, which should also include landscape

character assessment, is being emphasized by many fundamental strategic documents and agreements, e.g. Pan-European Biological and Landscape Diversity Strategy (Council of Europe 1996), The European Landscape Convention (Council of Europe 2000), Agenda 2000 – a reform program of the European Commission regarding Common Agricultural Policy, activities adopted by European Ministers Conference responsible for spatial planning (CEMAT 2006) a.o. Among significant European projects, especially focused on the assessment and protection of landscape character and analysis of the approaches in selected European countries, also the ELCAI project (www.elcai.org) (Wascher 2005) is included. 14 European countries collaborated in this project. The ELCAI project required participants to formulate national specifications for the European Landscape Typology and Map (Mücher et al. 2006) towards becoming a commonly accepted reference for future European policy implementation in the field of rural development, agro-environmental assessment, sustainability impact assessment and biodiversity conservation. Some other typologies of diversity and land use have been elaborated within the frame of the European research. All these approaches reflect mutual connections among soil, relief, climate conditions, and also historical development of land use. Information on the physical (soil, geology and topography) and the cultural (settlement pattern, land use and historical woodland pattern) features is used to define landscape units that capture relatively uniform landscapes at different spatial scales. Other projects, results of which may methodologically contribute to the issue of landscape typology in Slovakia, are e.g. SENSOR (www.sensor-ip.org), ENRISK (www.ecnc.nl), ATLAS (www.atlas-eu.org) and CORINE land cover (www.reports.eea.europa.eu).

Cultural landscape classification, in the majority of European countries known as landscape typology, is a great challenge of landscape research and appeal of the societal interest. The major problem is how to determine the appropriate scale of analysis, to choose significant attributes for landscape type classification and to define classification criteria.

Efforts to introduce or incorporate scientific results in practical life are obvious from the topical landscape-ecological and environmental studies (Antrop 2005, Oťahel' 2005). Emphasis is laid on the respect for sustainability, application of integrated landscape management and introduction of transdisciplinary approaches (Naveh 2000). Precisely the transdisciplinary projects constitute a new integrating theory and knowledge between science and society. Increased attention is given to creation of tools, models and indicators applicable in the landscape impact assessment. As Pedroli et al. (2006) assert, several applied landscape studies of landscape classification are carried out with inclusion of varied local interest groups. It is the response to the necessity to know the state of the cultural landscape for its diminishing diversity and to the requests of the European Landscape Convention.

An effective implementation of landscape studies stills runs to several serious barriers which encumber its use in practical life. One of them is the very position of such studies in the system of spatial planning. Most often, landscape studies and landscape plans are classified as mere source documents for spatial planning. An important document that can strengthen the position of landscape planning in the planning system is for instance the European Landscape Convention. Implementation of the Convention intensively exploits the knowledge and applications of landscape ecology, for instance in preparation of landscape conception, landscape classification or identification of the target quality of landscape, etc.

Another important barrier in implementation of landscape studies is an insufficient respect for economic interests and aims of owners or users of parcels. This problem is pointed at not only in the studies

of landscape ecology and landscape planning, but also those of ecological and institutional economy. In this context, the theory of collective (communal) institutional management proposed by the group of scientists from the Indiana University (for example Anderies et al. 2004) is inspiring. Principles of robustness presented by authors are also very important from the point of view of owners' and users' regimes as a combination of owner rights and rules of their management.

Slovakia approaches the issue of landscape typology in the time when many significant scientific European projects outputs are already available (e.g. project ELCAI, Wascher et al. 2005). More over, the majority of European countries have their projects and required typology for their specific conditions already elaborated (e.g. Czech Republic Löw 2005). That is why we have the opportunity to use not only the available domestic projects, but also the foreign project outputs, as well as their gained experiences.

2. Theoretical foundations, resources and objectives of the project in preparation

The validity of the concept of cultural landscape is general as it indicates the basic traits in terms of approaches to its research. In geographical learning they are the immanent dimensions of time and space and in the content of the landscape ecological context they are the natural ecological, social, economic, technical, cultural ideological even environmental dimensions. Above all the environmental dimension is the key problem for the solution of the basic relationship between humans and landscape (Oťahel' 2005). Landscape is the primary source of the biological existence of humans. Humans ensure their existence mainly by using the landscape in the broadest sense of the word by work and by dwelling. The social dimension of humans has also contributed to the attribute of its movement and communication and predestined landscape as a space of settlements and transport corridors. Above all the intellectual dimension has determined the development of cultural structures and spiritual monuments in the historic context created, cultivated or recreated in the landscape as the heritage of permanent values. Socially and spiritually living humans though, also need to relax and protect their health. This dimension found reflection in securing the significant parts of landscape such as the medicinal resources or health areas in the sense of natural phenomena and the landscape. Landscape protection is also interpreted as the protection of its cultural heritage, national identity and protection of the proper environment. The imperative of sustainability is in respect for harmony in the relationships of humans and landscape with the aim to preserve human existence in cultural landscape. The synergy of the mentioned dimensions is perceived as the real landscape. The multidimensional landscape also evokes the need of varied approaches to its cognition and interpretation (Naveh 2000; Zonneveld 2005). The quoted landscape dimensions can be simplified in the following sequence:

From the physical essence of the original natural landscape over its modification and creation of cultural landscape, its physiognomic manifestation, visual quality, scenic nature, spiritual identity, legacy of historic implications, environmental landscape quality up to landscape significance – societal landscape responsibility).

The objective of the project "Landscape Typology of Slovakia" is to propose a hierarchy of classification of the landscape in Slovakia from the supranational level up to the local level and to elaborate a classification for each of the levels in a way that it could be used in planning and decision making processes, background documents and documentations regarding land use. The basis of the assessment will the definition of the natural-cultural landscape types. One of the main objectives will be the practical implementation of its outputs and an

understandable interpretation for public. Analogous to the foreign projects handling the topic of the landscape typology, the primary reason for handling this task is not only the requirement of the European Landscape Convention establishments' implementation, but also the general need to unify the view of distinctiveness and diversity of Slovak landscape types and their sustainable use.

Slovak landscapes are in many aspects representative as, similarly to the central European landscape, it represents a diverse range of societal and environmental issues in a variety of geographical contexts in both the developed and developing regions. Slovak landscapes are characterized by high value landscape in terms of both their natural and cultural diversity encompassing a deeply humanized landscape with historical roots (protected areas represent 24.8 % – 9 national parks, 14 protected landscape areas, 603 nature reserves; seven sites on the World Heritage List, 4 Biosphere Reserves) and a devastated landscape due to the urbanization and industrialization processes.

Landscape classification (typification a regionalization) in Slovakia has already been the object of many scientific projects, studies and its map representations exist in different publications and atlases (e.g. Mazúr 1980). Besides, methodical procedures usable in this project were elaborated (e.g. Oťaheľ 1999). In comparison with the procedures elaborated until now, outputs of this project should not only be scientifically exact, but also practically feasible and understandable to public. In particular, the Landscape Atlas of the Slovak Republic (Miklós, Hrnčiarová 2002), Atlas of Representative Geoecosystems of Slovakia (Miklós, Izakovičová 2006) will serve as the basic documents for the national level and also other available national atlases e.g. Demographical Atlas of the Slovak Republic (Mládek 2006) and national databases (databases of the Monuments Board of the Slovak Republic, the State Nature Conservancy of the Slovak Republic, maps of environmental geofactors, databases of the CORINE land cover – CLC90, CLC2000, CLC2006, a.o.).

The core of the assessment will be point out and delimitate the natural-cultural landscape types, which (similarly to other European countries) will be characterized by:

- Relief-climate-soil-vegetation units, which had predetermined the form of land use in the past, as well as the form of historical settlement and the first landscape cultivations (categories will be set, which will be then filled in the natural units),

- Existing form of land use and settlement forms (the historical and the existing form of land use will be compared and the degree of distinctiveness will be determined),

- Level of protection (protected natural areas and monuments), where the reference to the landscape character and characteristic landscape features will be interpreted.

A special emphasis will be put on the cultural-historical aspects, although many of its traces in the landscape are just fragmental. In spite of that, it is needed to include them and identify them as landscape historical layers. It is therefore important to elaborate particular methodological procedures to include the spiritual dimension of landscape. On the basis of the actual domestic and foreign experiences, a frame methodical procedure was prepared, which served as one of the resources when elaborating the methodical procedure draft of the project "Landscape Typology of Slovakia" (Oťaheľ, Hrnčiarová, Kozová 2008).

3. Results – The proposal of the project's methodical procedure

The methodical procedure was elaborated on behalf of background studies and results of working discussions of the members of following workgroups: (1) Methodical-coordinating group, (2) Natural and cultural

landscape group, (3) Cultural-historical identity group, (4) Human dynamics (settlement processes) group, (5) Implementation-promotional group. The proposal of the project's methodical procedure for the "Landscape Typology of Slovakia" should consist of following four main parts (Kozová et al. 2008):

3.1 Project analysis

This part regards:

a) analysis of the contemporary state of processing and utilization of landscape typology within Europe and European countries (international aspects of landscape typology). It will be very important to provide for transmission and compatibility of the European typology results to the Slovak level. To analyze of the resources and criteria for working up the typology in selected European countries (e.g. from the projects of surrounding countries: Czech Republic, Austria, Hungary and other countries: Netherlands, Great Britain and Belgium)

b) analysis of existing partial backgrounds for elaborating landscape typology in Slovakia, their availability and feasibility (digital/analog form, scale, % of the coverage of the territory of Slovakia with a professional background, availability of the background, authors` rights, a.o.)

c) analysis and selection of the criteria for elaborating landscape typology of Slovakia (natural landscape structure, historical landscape structure, contemporary landscape structure, cultural-historical structures, localities, objects and cultural-historical landscape potential and elements determining landscape perception)

d) Slovakia landscape analysis from the viewpoint of its implementation into planning and decision-making processes regarding land use. To specify of indicators for agricultural, vineyard, forest, mining, urbanized, recreational and other types of landscape on different hierarchy levels

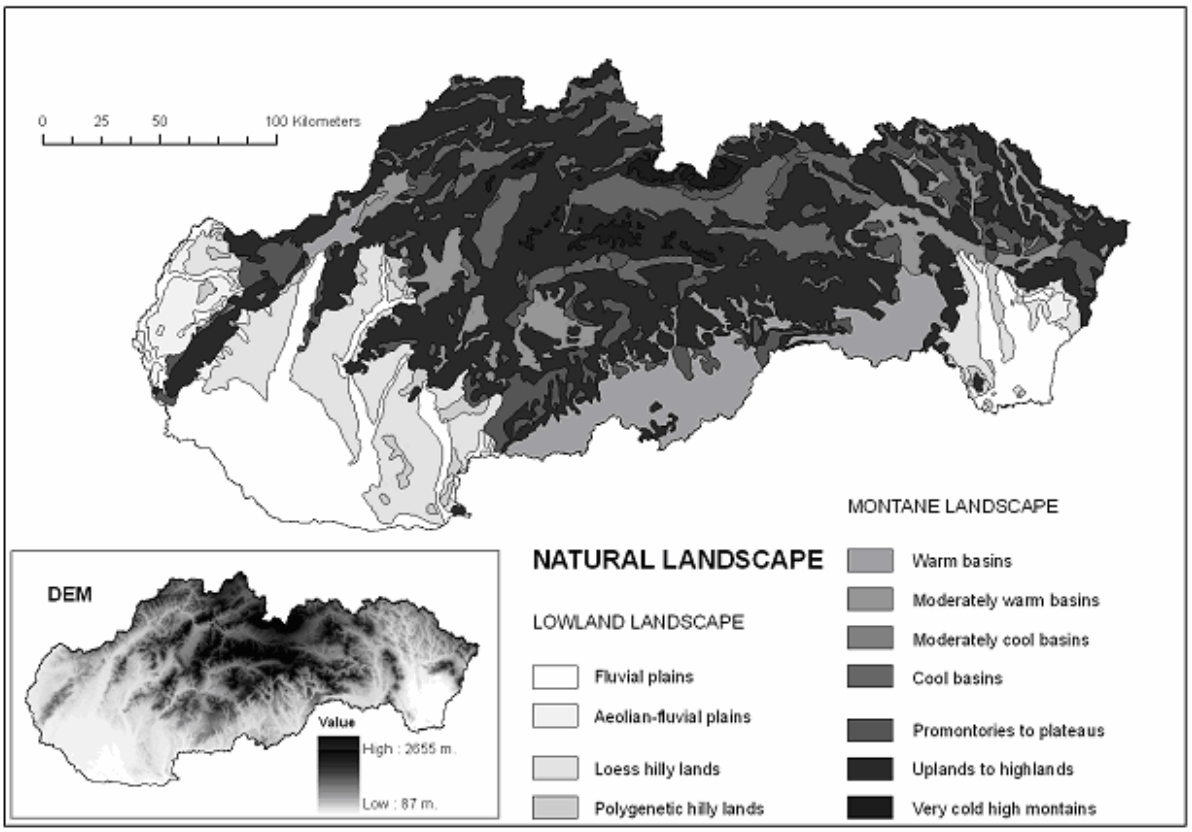
e) analytical maps digital processing.

3.2 Landscape identification

Landscape types of Slovakia will be identified in reference to the European landscape types system: In this part we expect to use the Pan-European Landscape Classification LANMAP2 from the year 2006, which methodically stems from synthesis of digital European databases on climate, relief, soils, potential vegetation and land cover. The synthesising approach to landscape identification will respect the principle of comprehensiveness and the sequence of the landscape structure hierarchy:

a) natural landscape layer (reconstructed landscape, **fig. 1**) – part of identification of the potential (hypothetic) state of the landscape (Oťaheľ 2004) will be also identification of natural conditions such as natural resources and natural phenomena (raw material, bioenergetic potential, potential vegetation, biodiversity).

Fig. 1 Natural (reconstructed) landscape of Slovakia (Oťaheľ 2004)



b) human landscape layer (land cover and land use) – is represented by the settlement and land use. Cognition of the human layer means identification of changes that concern natural layer, cognition of the development of settlement and the principal states of historic land use applying accessible cartographic works. The present land use, material entity of which is the land cover, is identified by means of the CORINE land cover (CLC) method (Heymann et al, 1994). Its most recent data layer for 2006 (CLC2006) above all will make it possible to present the real landscape at the national and regional scales (1:500 000 to 1:100 000). Identification of landscape types will focus on hierarchy of functions corresponding to land cover and presentation of the multifunctional dimension of landscape (Feranec, Oťaheľ 2001; Oťaheľ 2004).

c) cultural landscape – types of cultural landscape will be identified by integration of the natural (reconstructed) landscape, real state of land cover and relevant functional types of the present landscape.

3.3 Interpretation and evaluation of the landscape

National scale:

a) landscape scenery (visual quality): physiognomy of landscape, character of settlement and its use is perceived as the image of landscape. Landscape image can be evaluated by several approaches; one of them is by means of identification of the physical state of landscape (land cover) applying the aesthetic principles and criteria

b) cultural-historical landscape identity: the cultural and historic development and phenomena of Slovakia can be assessed in terms of constitution of

administrative territorial units in the context of the expanding settlement and formation of the cultural landscape.

c) environmental landscape character: the cultural landscape will be assessed in terms of the dominant land cover type and hierarchy of relevant functions from the point of view of the character of the environment and life quality

d) landscape significance (societal landscape responsibility): the multifunctional dimension of landscape will be assessed in terms of significance, uniqueness and rarity of functional types in the context of existing limits or offer for the progress of landscape. Cultural and historic phenomena and legislation concerning nature conservation form the framework of the societal responsibility in the regional development of Slovakia.

Regional scale: this part concerns mainly identification and evaluation of the representative, rare, unique natural and cultural-historical landscape types:

a) establishment of the representativeness, uniqueness and rarity criteria for landscape types in terms of their use, protection of endangered types, nature and landscape in general, solution of stress situations and negatively affected types

b) proposal of areas to work up model projects of special management for representative, unique and rare landscape types at a more detailed scale

c) interpretation of land use structure from the viewpoint of expected human (urban) dynamics and sequential changes, including climate change

d) proposing regulations for location of new activities into landscape for individual landscape types – differentiated landscape types tending

e) digital processing of representative, unique, rare and threatened landscape types in Slovakia and other interpretation maps.

3.4 Implementation and promotion of the project's outputs

So far it is only a frame proposal of the content for this part, which will be further specified on the basis of methodology verification on model/example areas. This part should mostly regard:

f) establishment of implementation indicators

g) preparation of a plan for the work with public and media

h) support to activities on the international level and strengthening the cross-frontier awareness

i) strengthening activities on the national, regional, micro-regional to local levels support to raised of the environmental public awareness, strengthening of cooperation and communication with stakeholders

j) verification of the proposed procedures of special management for the model areas

k) potential identification for the implementation of the project's outputs into the related projects

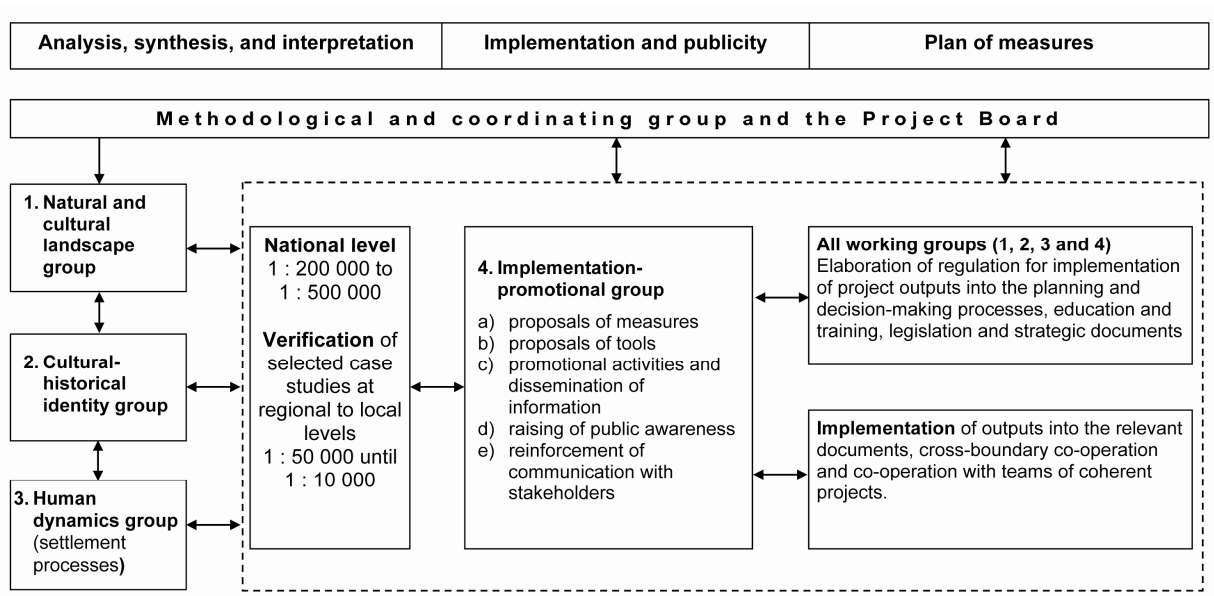
l) project outputs implementation into education and Action Plans

m) project outputs implementation into enactments, documents and methodologies.

A significant part of the project will be its consecutive promotion and elaboration of a plan for the work with public and media. There are recommendations in the methodological resources saying that the Project outputs should be implemented into the relevant enactments, documents and methodologies from time to time. They should also be used (and verified on the model examples as well) e.g. when determining the potential and regulations within: landscape planning, spatial planning, strategic social-economical planning, land

consolidations, integrated river-basin management, forestry plans, nature and landscape protection concept, environmental impacts assessment, a.o. **Fig. 2** brings the scheme of interconnections between outputs produced by the individual work groups and the relevant projects.

Fig. 2 Landscape Typology of Slovakia – proposal of implementation plan (Kozová et al. 2008)



4. Conclusions

The proposed methodology takes into account requests of the implementing phase (its analytical, synthesising and interpretation parts) above all the one to reach the most efficient possible application in practice. An important part of the projects is its continuous promotion based on the plan for public relations and media. Areas and tasks where outputs of the Slovak landscape typology will be applied will be specified in the first part of the project work It is presumed that the project outputs will be continuously implemented into legislation, regulations, documents and methodologies. They will be also used for the establishment of potentials and regulations corresponding to landscape planning, territorial planning, strategic, socio-economic planning, land consolidation process, integrated management of river basins, forest management plans, nature and landscape conservation concepts, environmental impact assessments, etc. Types of the cultural landscape will integrate the natural landscape potential, real state of land cover and hierarchy of the relevant functional types.

The delimited cultural landscape types will be further be processed even on the grounds of rendering specific features, which played a significant role in the past by the process of colonization, settlement and cultivation of the landscape. It is possible to propose landscape management and measures to maintain the delimited types and regions of cultural landscape, or their revitalization as a foundation for spatial planning, regional development and various section plans. Cultural landscape will be represented by the contemporary land use, material entity of which features land cover. Its identification through the CORINE land cover (CLC) method, mainly the newest data layer from 2006 (CLC2006), enables to present real landscape at the national and regional map scale (1:500 000 up to 1:100 000). At the local level it is possible to present only selected examples analogous to the representative geo-systems. Significant

phenomena of the cultural landscape are historical landscape structures with their traditional way of farming and settlements, which – because of their values – are very much appreciated not only from the national, but also from the international point of view (traditional vineyard, agrarian and mining landscape, landscape with various forms of settlement, buildings, and so on). It will be necessary to identify localities with preserved traditional forms of farming, historical landscape structures documenting particular evolutional phases of the society development, which mainly in these days request a particular attention. The cultural landscape typology process should be performed along with the evaluation of the territory of Slovakia upon historical landscape structures, which maintain until present and in which cultural as well natural landscape features blend together (Oťaheľ, Hrnčiarová, Kozová 2008).

Another specific cultural landscape phenomenon is cultural monuments. The view of the cultural monuments has led to a gradual widening of the sphere of the interest of protection, form protection of the individual precious objects (element protection without relation to its surrounding) to whole building compounds including monitoring of relations of the historical objects to their immediate as well as outlying vicinity. Identification of the areas with preserved traditional way of farming in the landscape is significant not only from the ecological point of view, but also from the cultural, historical, esthetical and landscape-ecological. For the sake of preservation of not only cultural-historical values in the landscape, but also of certain way of farming/land use, areas should be sorted out where this way of farming is still preserved. At the same time, a certain way of their conservation is needed, which would become a source of history and renewal of natural as well as cultural heritage of the landscape for the surrounding intensively used areas. Besides the cultural monuments and the protected natural areas, which are being designated by legislation, it is possible to delimit conservation of the historical landscape structures with their traditional way of farming (Oťaheľ, Hrnčiarová, Kozová 2008): (a) traditional vineyard landscape, (b) traditional agrarian landscape, (c) traditional landscape with dispersed settlements, (d) traditional pond landscape, (e) traditional forms of settlement with original folk architecture (wooden villages, churches, etc.) and (f) traditional landscape with balneal therapy (sanatoria, spas and spa cities) a. o.

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Global leaders of retailing and their impact to regional scale

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Abstract

The text focuses on geographical aspect of the transformation of the retail sector from the global to regional and local scale. The paper presents the influence of the strategies of global commercial companies on the forming of the commercial network in Poland, where after 1995 the expansion of the transnational companies (mainly French, German and British) has been observed. Over a period of 10 years, internationalisation observed on a wide scale there has changed the functional and spatial structure of commercial network and caused forcing out of (and in large cities the domination over) traditional forms of trade by modern trade, mainly large scale retail facilities. The spatial development of foreign commercial networks is shown from the point of view of cartography with the description of unique features of location strategies adopted by some of them. At the same time, the phenomenon of spatial competition among companies is analysed, including the activity of domestic commercial networks. The involvement of domestic capital and consolidation phenomena have led to the establishment of several commercial companies, which successfully compete with foreign entities in several market segments in Poland. As it has been shown, some of them adopt or reproduce marketing and location strategies of western corporations and are characterised by similar spatial development. Their success on the domestic market results from quality organisation and logistics, and most of all from the occupation of spatial and commercial niches.

Keywords: social capital; cultural capital; trust; local community; old industrial region

1. Introduction

The presented article shows the size and location of the world retail trade leaders. As a result of economy globalisation, international expansion of commerce tycoons accelerated the process of retail chains concentration, resulting in higher and higher domination of the largest retailers in many countries. The expansion mainly

concerns the emerging markets: Central and Eastern Europe, Eastern and South-eastern Asia, the Middle East and Latin America. The object of the study includes the leading world trading companies, listed in Top 250 according to statistical data of Deloitte Touche Tohmatsu (Global Powers of Retailing 2008). Reports used in the study include data from 2006 and 2007 on the registered offices, line of trade, scope of operation and the volume of sales and revenues of the companies. The last section of the study analyses the development and localisation strategies of two leading world retails chains: German Metro AG and British Tesco.

2. Leaders in the world trade market

The largest, in terms of sales volume, retailers generate annual turnovers of ca. 3.25 billion dollars and in the last three years have noted 8 % growth of sales per year (Global Powers of Retailing 2008). The growth characterises the majority of traders. In 2007, 165 companies noted sales increase, 49 sales decrease and 36 remained on a stabile level. From among 187 global leaders who made data on their 2006 revenues available, 180 companies noted net profit and 7 enterprises noted no profit or loss. The growth of income in 2006 was 3.6%, being higher than the dynamics of profits earned in the previous years (3.5 % in 2005, 2.7% in 2004). The brief statistical picture illustrates the scale of financial operations of the largest trading concerns, their considerable profits and high dynamic of revenue growth.

The strong concentration of retailers' capital is accompanied by spatial concentration, connected with the localisation of the registered offices of traders. From among 250 leaders, 37.2 % are American companies, 18.4 % companies from Western Europe with registered offices in one of 3 countries: Great Britain (8%), Germany (7.2 %) and France (5.2 %) while 11.6 % are Japanese companies (**tab 1**). More differences between the world regions are observed when the value of sales is compared. The American companies concentrate as much as 45% of the total sale of 250 largest retailers, companies from Western Europe 28 % (significantly more than results from their share in the number of companies), while Japanese traders only just under 7 % (less by half than their share in the quantitative structure).

The American and European companies are characterised by average highest value of sales – over 15 billion dollars per annum per a company (**tab. 1**). The triad of North America (USA and Canada), Europe (mainly western countries) and Japan concentrates in total 89 % of the largest trading companies of the modern world. Their share in the global sale of 250 companies is even higher and amounts to 94.5 %. Five leading countries: the USA, Japan, Great Britain, Germany and France concentrate 173 retail trade tycoons, i.e. 69 % from the total of 250 companies (their value of sale is 80 %). In the group of only 100 largest retailers, the numerical share of companies from the above mentioned five countries is 73 % (**tab. 2**).

The largest retailers listed in Top 250 come from 30 countries and mostly from Europe (19 countries). As has been already mentioned, companies from the USA are most often represented in the ranking (93). On the European continent one may observe the dominant role of the British, German and French companies (in total 51 companies per 91). The registered offices of the next 14 traders are located in the Scandinavian countries (the highest number 6 in Sweden), in Belgium and Holland (8), in Italy (6) and Spain (5). There are also individual representatives of other countries, including Iceland, Portugal, Austria, Norway, Denmark and Finland. Top 250 ranking also includes companies originating from countries of the post-soviet block, 2 from Russia and 1 from Hungary (ranked further on the list, on 229, 191 and 180 place, respectively). In Asia, apart from the dominant role of Japan (29 companies), the largest trading companies have their

registered offices also in China (6, including 2 in Hong Kong), South Korea (3), Taiwan and in Turkey (1 each). Moreover there are also trading tycoons from Mexico (5 large trading operators), South Africa (4), Australia (3), Brazil and Chile (2 each) (**fig. 1**).

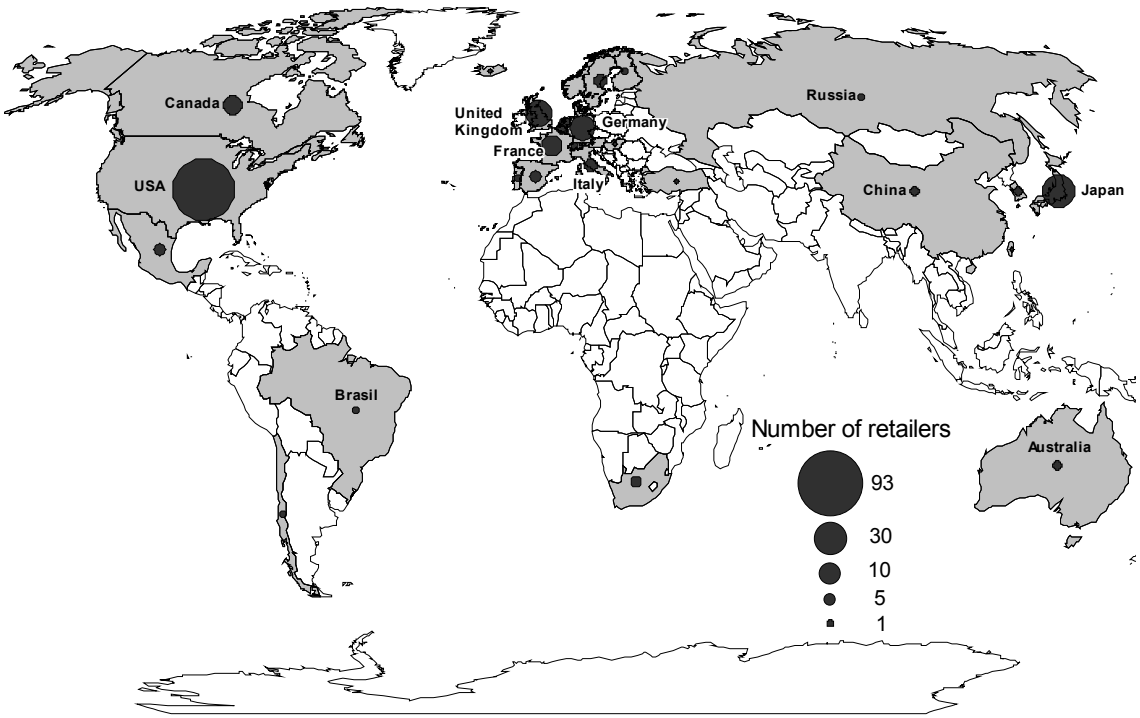
Tab. 1 Localisation and average sale of 250 world largest trading companies by geographic regions (source: Own studies based on Global Powers of Retailing 2008)

Country / region	Number of companies		Share in sales [%]	Average annual sales per a company in billion USD
	number	%		
North America, including the USA	104	41,6	48,3	15.097
	93	37,2	45,5	15.899
Europe, including Great Britain, Germany, France	91	36,4	39,4	14.075
	20	8,0	8,2	13.384
	18	7,2	10,9	19.732
	13	5,2	9,4	23.444
Asia and Pacific, including Japan	42	16,8	10,4	8.013
	29	11,6	6,7	7.448
Latin America	9	3,6	1,2	4.426
Africa / The Middle East	4	1,6	0,6	4.738
Top 250	250	100,0	100,0	12.985

Tab. 2 Spatial concentration of trading companies from Top 250 world leaders (source: Own studies based on Global Powers of Retailing 2008)

Ranking of companies	Companies by country of origin					Total	
	USA	Japan	Great Britain	Germany	France	number	%
100	36	7	11	10	9	73	73,0
101-250	57	22	9	8	4	100	66,7
Gesamt 250	93	29	20	18	13	173	69,2

Fig. 1 Localisation of 250 world largest trading companies by countries (source: own studies based on Global Powers of Retailing 2008)



Tab. 3 Top 10 world largest retail traders in 2007 (source: Own studies based on Global Powers of Retailing 2008)

Rank from among trading companies	Rank from among all companies	Name	Mother country	Sales in billion USD	Annual growth of sale (%)
1	1	Wal-Mart Stores, Inc.	USA	378,8	10,4
2	33	Carrefour S.A..	France	115,6	4,6
3	51	Tesco plc	Great Britain	94,7	10,4
4	56	Metro AG	Germany	90,3	7,4
5	65	The Home Depot, Inc.	USA	84,7	11,4
6	87	The Kroger Co.	USA	70,2	9,2
7	99	Costco Wholesale Corp.	USA	64,4	13,7
8	102	Target Corp.	USA	63,4	13,1
9		Schwarz Unternehmens Treuhand KG	Germany	52,4	13,2
10	138	Sears Holdings Corp.	USA	50,7	7,9
Total	-	-	-	1.088.605	10,2

The phenomenon of concentrated commercial activity is best illustrated by the financial potential of 10 largest companies – world leaders in retail trade. The first seven companies from the list belong to Top 100 largest economic enterprises of the modern world. **Tab. 3** presents their characteristics in terms of sales volume and dynamics.

Top 10 includes trading companies which in 2006 generated 30.1% of the sales value of 250 largest companies. The share in the last 10 years increased by 5%, meaning a growing concentration of sale in the group of 10 largest retailers. Their total sale in 2006 was USD 978.5 billion and was by 10.2 % higher than in the previous year (Global Powers of Retailing 2008). There are 6 American companies listed in Top 10 (Wal-Mart, Home Depot, Kroger, Target, Costco, Sears Holdings), two German (Metro and Schwarz) and one French (Carrefour) and British (Tesco). The majority of mentioned companies operate on markets in many countries, e.g. Wal-Mart in 15 countries, Tesco in 12 countries, Metro and Carrefour (in 31 countries each).

3. Scope of operation of the largest trading companies

The process of economy globalisation manifests itself in internationalisation of commercial operation and expansion into another countries. The world trade leaders, to attain the highest profits, have to operate in a large market, including whole countries, groups of countries, more and more frequently located on several continents. From international perspective, the scope of operation can be divided, in terms of space, into: domestic, regional (several countries, most often neighbouring), sub-continental (a major part of a continent), continental (most of the countries on a continent) and transcontinental (multicontinental – operations on more than one continent).

Companies operating globally, i.e. on all continents (except for Antarctica), or in almost all countries in the world are very rare in the commercial line of trade. The phenomenon applies to a few retailers only, mainly operating through mail-order sale (non-store retail), including Dell Inc., Alticor Inc. (Amway Quixtar) or Avon Products, Inc. From among retailers trading through retail chains, only 2 companies have a world-wide scope of operation (on all continents): the French PPR S.A. operating in 48 countries and the American Toys „R" US, Inc, present in the markets of 35 countries.

The largest world retailers operate both in the domestic and international markets. The continent of North America is the largest sales market, with almost half of Top 250 companies present. It mainly results from the dominant position of companies from the USA. The European continent is the second area of operation, occupied mainly by companies from Western Europe countries. There are Asian companies (mostly Japanese), as well as European and American concerns operating in the Asian market. There are less than 20 world retail trade leaders operating on other continents (Australia, South America and Africa).

40 % companies from Top 250 limit their market to one country only, the remaining 60% also sell goods abroad, qualifying for the title of international or transnational companies. **Tab. 4** shows a clear regularity: the level of internationalisation increases with the size of a company. The share of companies operating in the market of one country only placed in the ranking group on positions below 200 (sales value below 3 billion USD) is 56 %, while in the group of 50 largest (sales above 15 billion USD) it is only 24%. Every fourth large trading company has small (regional) scope of operation, limited to the territory of 2-5 countries, every seventh company has sub-continental scope of operation (6-10 countries), every tenth trader has continental or transcontinental scope of operation (11-20 countries and above) (**tab. 5**).

Tab. 4 Sales markets of 250 largest trading companies by the number of countries (source: Own studies based on Global Powers of Retailing 2008)

Number of countries	Number of companies from Top 250					Total	
	1-50	51-100	101-150	151-200	201-250	number	%
1 country	12	14	22	26	28	102	40,8
2 -5 countries	11	17	12	14	10	64	25,6
6-10 countries	9	8	5	7	4	33	13,2
11-20 countries	9	1	8	3	5	26	10,4
Over 20 countries	9	10	3	-	3	25	10,0
Total	50	50	50	50	50	250	100,0

The American, French, British, German and Japanese concerns definitely have an international character. One may observe geographic diversification of the markets. The American companies have definitely took over the market of North America, Central America and South America (except for Paraguay, Guyana and Surinam). Their presence is also distinct in Europe (all countries except for Byelorussia), in Australia, Oceania and South-eastern Asia (except for Laos, Cambodia and Myanmar). The largest American trading companies generally do not invest in the Central and South Asia or African countries (except for Egypt, Morocco and South Africa). The American companies are also not present in some countries of the Middle East, mainly those politically unstable (among others Syria, Jordan and Yemen). In general, the American companies trade in 134 countries in the world.

The French companies are second in terms of the scope of expansion, operating in the markets of 112 countries. Their scope of operation to a large extent overlaps with the American companies, although it is not as extensive, in particular in Latin America (the French companies are not present in the Andes countries and several countries of Central America). The British and German companies operate on a smaller area (92 and 72 countries, respectively). They are not present in the countries of Latin America and Africa, concentrating their operations in the European, Asian and North American countries. Foreign investments of Japanese tycoons are limited to highly developed countries only (the USA, Canada, Australia, most European countries) and several countries of South-eastern Asia (China, Taiwan, Singapore, Thailand, Malaysia, Vietnam).

The level of internationalisation of companies originating from certain countries, geographic regions and world is presented in **tab. 5**. From among the world Top 250 traders, companies originating from the European countries have the most internationalised character. Almost 90% run business operations abroad, most often on a large scale, proved by the average number of countries where they sell. Companies originating from Germany and France are the most internationalised. Every company from Top 250 operates abroad, in a dozen or so countries on the average. More than half of American companies also operates beyond the borders of their country (in case of

Canada – only 2 from 11 listed in Top 250). Companies operating in the domestic market only predominate in the group of the largest Japanese companies (19 from 29). On the world scale, from among 250 analysed companies, 150 invest abroad (60 %). The largest companies from Western Europe, operating at least in the markets of 10 countries, are strongly internationalised (French companies - 15, German companies – 14). Large area of operation means that they attain more than world average value of sales.

Tab. 5 Level of internationalisation and scope of operation of Top 250 world traders (source: Own study based on Global Powers of Retailing 2008)

Region/ country of origin of company	Number of companies		Scope of operation (average number of countries)
	number	% companies operating abroad	
North America, including the USA	104	51,0	4
	93	54,8	4
Europe, including	91	86,8	10
Great Britain,	20	75,0	10
Germany,	18	100,0	14
France	13	100,0	15
Asia and Pacific, including Japan	42	45,2	4
	29	34,5	3
Latin America	9	55,5	2
Africa / the Middle East	4	100,0	11
Total (Top 250)	250	59,2	6

The area of the USA is the largest market for giant trading concerns. It is dominated by native American companies. From the list of top 111 largest trading companies operating in the USA, as many as 93 (84 %) are native companies and only 18 (16 %) are concerns originating from another countries (**fig. 1**). Great Britain takes the second place as long as large companies present in the market are concerned, with 59 companies from Top 250 operating, including 20 British and 39 foreigner (66 % share). The next places belong to the German market (47 companies including 62 % from abroad), Japanese market (44 companies, 34% foreign) and French market (43 companies, 70 % foreign). It is easily noticeable that the ranking leaders in terms of number of trading companies and sales volume are also among the leaders in terms of sale markets. The number of companies operating beyond the markets of North America, Japan and Western Europe is becoming bigger and bigger. It is an effect of the growing role of the emerging markets. It can be clearly observed on the example of China, with already 37 large foreign traders operating (amounting to 15 % from Top 250 world biggest retailers). Russia and the countries of Central and Eastern Europe are

the next internationalised markets, with 33 transnational operators in Russia and 36 and 35 foreign traders from Top 250 in Poland and Czech Republic, as well as other countries including Turkey, Brazil, Mexico or Malaysia.

4. Degree of concentration of retail trade in Europe

The European retail market, next to the North American market, is one of the most developed and diversified markets in the world. Every third company from Top 250 has its registered office in Europe and every second operates in this market. The market is very extensive, due to the population, fragmented, due to the large number of countries and profitable, due to high purchasing power and growing needs of the consumers.

Tab. 6 presents the ranking of companies operating in the European market by revenues earned from sale on this continent only. Europe is a market dominated by native operators. The only one exception is an American company Wal-Mart, ranked as 12th in Europe in respect of the sales value. It should be however observed that the European turnover of the company is only ca. 10% of its global revenues.

Tab. 6 Retail trade leaders in the European market in 2007 (source: Own study based on Retail in Europe Database 2008 (www.retail-index.com)

Rank	Name	Country	Income in billion EUR	Rank	Name	Country	Income in billion EUR
1	Carrefour	France	68,4	15	Morrison	17,7	Great Britain
2	Metro	Germany	62,5	16	El Corte Ingles	17,0	Spain
3	Tesco	Great Britain	55,3	17	IKEA	14,8	Sweden
4	Schwarz	Germany	48,0	18	PPR	14,8	France
5	Rewe	Germany	43,5	19	Systeme U	13,8	France
6	Edeka	Germany	37,2	20	A.S. Watson	13,0	Great Britain
7	Aldi	Germany	37,0	21	Marks&Spencer	12,6	Great Britain
8	Auchan	France	34,5	22	Mercadona	12,1	Spain
9	ITM	France	29,5	23	Kingfisher	11,7	Great Britain
10	E. Leclerc	France	29,4	24	DSG International	10,6	Great Britain
11	Sainsbury	Wlk. Brytania	23,5	25	Migros	10,3	Switzerland
12	Wal-Mart	USA	23,1	26	Ahold	11,7	Holland
13	Casino	Francja	18,5	27	Coop Italy	10,0	Italy
14	Tangelman	Niemcy	18,3	28	Euronics	9,8	Holland

The food sector is definitely the most powerful sector of retail trade in Europe. Companies selling foodstuff are positioned on the first 14 places on the list of trade leaders in Europe (**Tab 6**). The next places in terms of sales volume are taken by companies trading clothing, electronic articles, internal design articles, furniture, cosmetics, sport articles, footwear and leather accessories. The largest trading companies operating in the mentioned lines of business in Europe are presented in **tab. 7**.

Tab. 7 The largest retailers in the European market by line of trade in 2006 (source: Own study based on Retail in Europe Database 2008 (www.retail-index.com))

Line of business	Name of company (value of revenues in billion EUR in 2006)
Foodstuff	Carrefour (70,0), Metro (58,2), Schwarz (50,0), Tesco (43,9), Rewe (43,5), Edeka (37,2), Aldi (34,0), Auchan (31,0), ITM (30,4), E.Leclerc (29,4).
Clothing	Marks&Spencer (12,6), H&M (6,8), Inditex (7,0), C&A (5,2), Next (4,8), Debenhams (3,4), Arcadia (2,7), Vivarte (2,6), Espirit (2,3), Peek&Cloppenburg (1,7).
Electronic articles	Media Markt/Saturn (15,1), DSG International (10,6), Euronics (9,8), Expert International (9,6), Argos (6,1), Kesa (6,0), FNAC/PPR (5,4), Electronic Partner (3,7), EDA EEIG (3,5), Boulanger (1,1).
House and garden	Kingfisher (11,7), Leroy Merlin (6,6), OBI (5,8), Praktiker (3,0), Bauhaus (2,5), Wilkinson (2,4), Hornach (2,4), Homebase (2,3), Rautakesko (2,1), Zeus (1,9), bricomarche (1,8).
Furniture	Ikea (14,8), B&Q (11,7), Home Retail Group (8,6), Conforama (3,3), XXX Lutz (2,1), Kika (1,3), MFI Furniture (1,3).
Sport and recreation	Intersport (7,7), Decatlon (3,7), JJB (1,2), Groupe GoSport (0,9), JD Group (0,8), Sport 2000 (0,8), Footlocker (0,5), Blacks Leisure (0,4)
Cosmetics, articles on sale at the chemist's	A.S. Watson (13,0), Boots (7,3), schlecker (5,7), Celesio (3,0), dm (2,8), Douglas (2,4), Alliance Unichem (2,0), Müller (1,6), Sephora (1,0)
Footwear, leather accessories	Vivarte (3,0), Reichmann (2,2), Eram (1,7), Garant (2,9), Bata (0,7), Footlocker (0,5), Leder&Schuh (0,4), Brantano (0,3), ANWR Schuh (0,2), Shoe Zone (0,2)

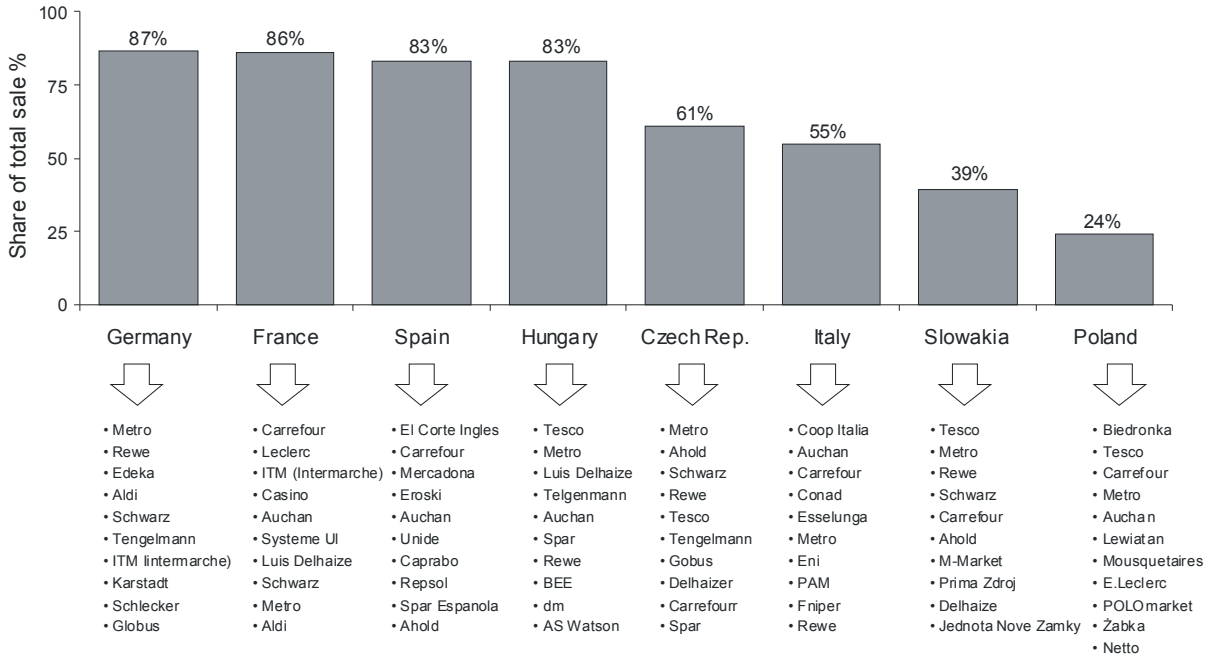
The dominance of large retail chains in the European market leads to a strong concentration of sale. It can be particularly observed in the FMCG goods segment. **Fig. 2** shows the scale of share of 10 largest retail chains in the market of several European countries. The share is very big (almost 90 %) in Germany and France, average (ca. 50 %) in Italy and relatively small in Poland (less than 30 %). The group of countries with strong concentration of trade includes countries of highly developed trading network, dominated by well established retailers. The concentration is less advanced in the countries of the Central and Eastern Europe, even though it progresses and the growth of share of the major retail players is more and more noticeable.

5. Foreign expansion on the example of METRO AG and TESCO.

The scale, scope of operation and foreign localisation strategy of the world largest retailers is discussed based on two selected examples: a German concern Metro and a

British retail chain Tesco. They are an illustration of the global operations.

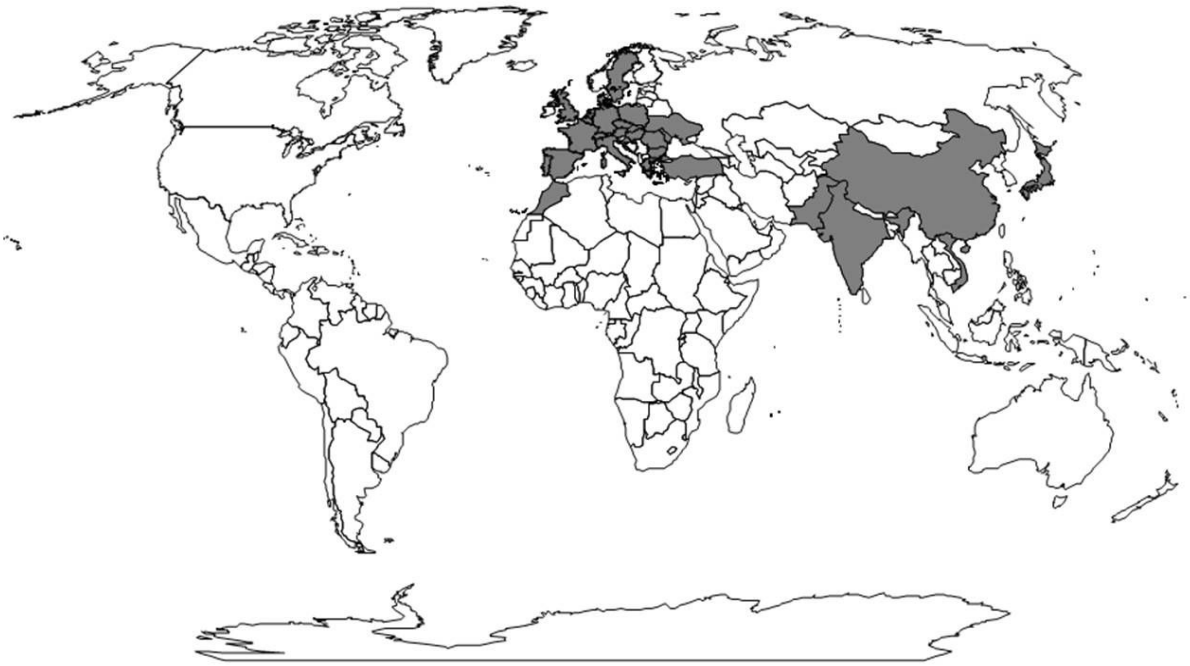
Fig. 2 Degree of concentration of sale of FMCG goods in some European countries - % share of 10 largest retailers. 2007 (source: M+M Planet Retail, GfK Polonia)



Metro Group (Metro AG) is a German trading concern with a registered office in Düsseldorf, operating in 31 countries around the world. In 2006 its turnover reached the value of almost USD 75.2 billion (ca. EUR 66 billion in 2007), it employs nearly 270,000 workers (according to www.metrogroup.de). The number of retail outlets in 2008 was 2,469 establishments: department stores, shopping centres and various type markets. The development of the company was made more dynamic in 1998 through swallowing up a sister company Makro Cash and Carry. Metro operates (**fig. 3**) mainly in Europe (except for Byelorussia, Lithuania, Latvia and Estonia), as well as in Asia (including China, Japan, India) and Africa (Morocco). Over forty years was spent by the company on winning such an extensive market (**tab. 8**).

The first Metro wholesale centre was established in 1964 in a German town of Mülheim (Metro SB-Großmärkte GmbH & Co). In 1968 a sister company, Makro Cash and Carry was established in Holland and in 1970 in Belgium. In 1971, self-service Metro wholesale outlets appeared in Great Britain, France, Austria and Denmark. The markets of southern Europe: Spain and Italy were entered in 1972. Morocco was the first non-European country where Metro wholesale centre was established in 1991. Makro is one of the first international trading groups to operate in the Central and Eastern Europe (first halls in Poland). In 1996 Metro extended its operation into the markets of the Far East, opening the first wholesale outlet in China in 1996, in 2002 in Japan and Vietnam and in 2003 in India. Metro AG is scheduled to enter the Egypt market in 2010.

Fig. 3 Scope of operation of Metro AG (source: own study based on the concern's data, www.metrogroup.de)



Tab. 8 Expansion of Metro AG into foreign markets (1964-2007) (source: own study based on www.metrogroup.de)

Year	Country	Year	Country
1964	Germany	1996	China, Romania
1968	Holland	1997	Czech, Bulgaria
1970	Belgium	1998	Slovakia
1971	Great Britain, France, Austria, Denmark	2001	Russia, Croatia
1972	Spain, Italy	2002	Japan, Vietnam
1990	Portugal, Turkey	2003	India, Ukraine
1991	Morocco	2004	Moldavia
1992	Greece	2005	Serbia
1994	Poland	2007	Pakistan

In general, Metro Group includes five distribution networks (number of outlets in 2007 according to www.metrogroup.de):

- Metro&Makro Cash and Carry – self-service wholesale outlets (615 in 29 countries),

- Real – foodstuffs and industrial megastores (682 in 5 countries),

- MediaMarkt – electronic megastores (508 in 15 countries),

- Saturn – electronic megastores (200 in 9 countries),

- Kaufhof Gallery – department stores (141 outlets in 2 countries).

The concern has an intricate organisational structure. Metro AG is

heading the concern as a holding responsible for strategic management. Operations are divided into four market segments: wholesale, retail sale of foodstuffs, specialist markets with industrial articles and department stores. Within those segments, the individual distribution networks of Metro Group are operating independently. There are some service companies within the group, meeting the needs of the distribution networks, providing a wide range of services in the following areas: supply, logistics, IT, marketing, catering and property management. In 2008 Metro AG in Tönisvorst near Krefeeld in North Rhine – Westphalia opened "Future Store" – a store of the future. The store is equipped with the latest self-service sale solutions based on radar identification (RFID), ensuring modern information on the products and innovative forms of payment for purchases.

The localisation strategy of Metro in the individual countries consists in ensuring a stable, and in some segments, a dominant, position in the market. In the megastore segment, REAL is one of the largest retail traders in several European countries, and its stores are characterised by large areas, competing with retail chains like Tesco (in Hungary, Czech Republic and Slovakia) and Auchan and Carrefour (in Poland). The chain of megastores with electronic equipment, MediaMarkt and Saturn, holds a dominant position in many countries. In several countries both chains operate parallel, and are even located in the same cities. Poland is a good example, with electronic megastores of Metro concern holding the monopolist position in the largest cities of the country (**fig. 4**).

Fig. 4 Localisation of electronic megastores MediaMarkt and Saturn in Poland in 2008 (source: own study based on data of Metro AG concern)

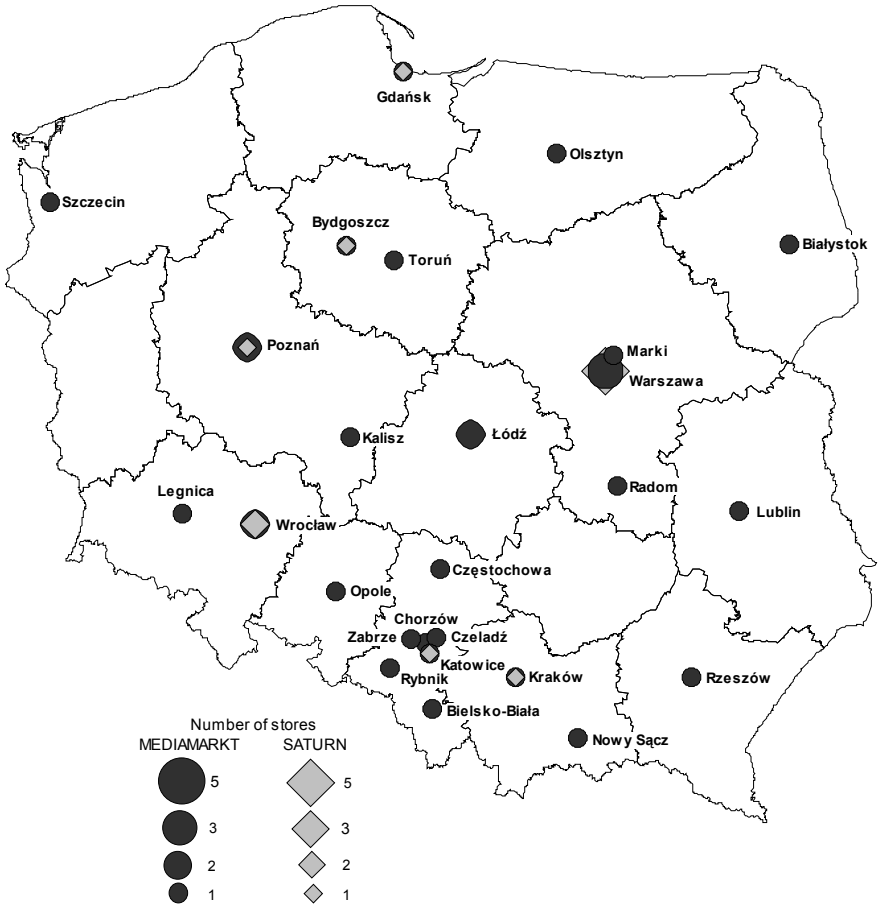


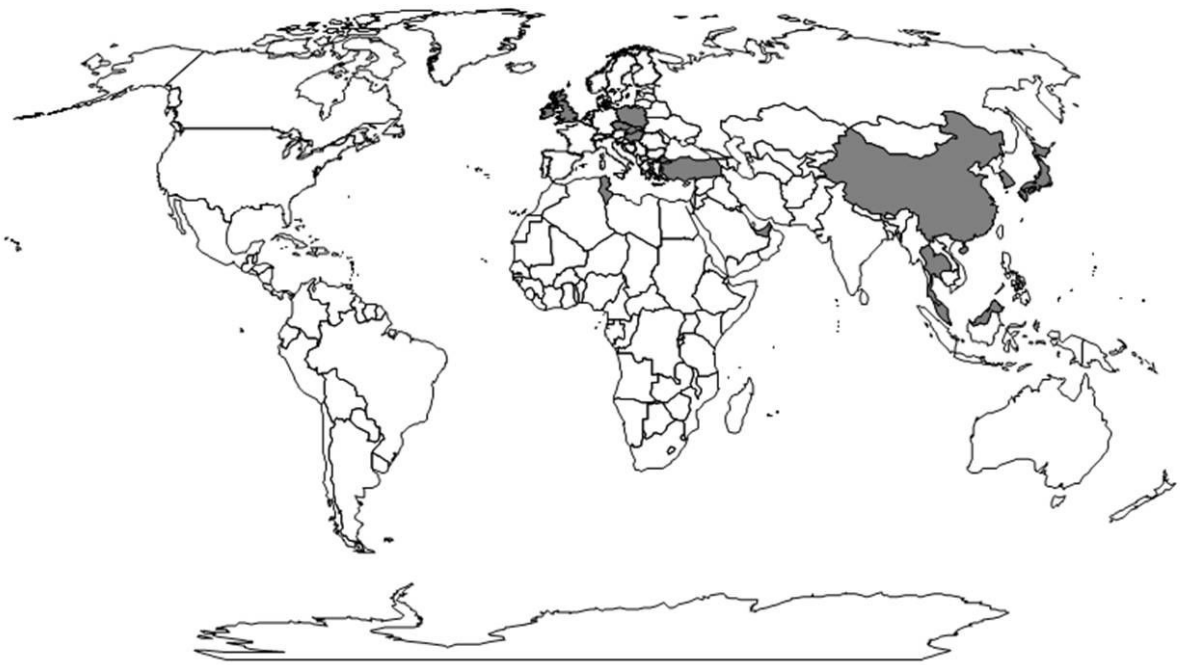
Fig. 5 Saturn Electronic Megastore in Stadsfeestzaal in Antwerp (author's photograph)

Fig. 6 MediaMarkt Electronic Megastore in a new shopping centre Alexa at Aleksanderplatz in Berlin (author's photograph)

Tesco is the largest British retail chain, operating in the markets of 12 European and Asian countries. At first the chain sold foodstuffs only, but later it extended its offer including clothing, electronic equipment and even cars, becoming a comprehensive retailer. The company owns almost 3,000 stores of various sizes (multi-format), from megastores to small shops and petrol stations. Tesco sales value in 2007 was USD 94.7 billion, giving the company the fourth position from among the world trading companies (behind Home Depot but before Metro) and 51 position in Fortune 500, a list of the largest economic enterprises in the world (just after the automobile concern Nissan).

Tesco company was founded by Jack Cohen, a trader of Polish descent (son of a Polish emigrant), who was involved in the sale of foodstuffs on markets in the London's East End since 1919 (according to www.wikpedia.org). His shops started to be named Tesco in 1924, when he bought a large cargo of tea from a company called T.E. Stockwell and identified the packaging using the first 3 letters of the supplier's name and the first 2 letters of his own name TES-CO. In 1947 Tesco became listed on the London Stock Exchange. Tesco opened its first self-service shop in 1948 in the town of St. Albans near London. In 1956 the first Tesco supermarket was set up in the town of Maldon in Essen (replacing a former cinema). In 1968 the first Tesco megastore was opened in the town of Crawley in West Sussex. Tesco has been trading fuel since 1974. In 1979 the annual turnover of the company amounted to billion GBP. In 1995 the company introduced loyalty cards and, just after, opened an e-shop. In the 1990s the company extended its operations into Central and Eastern Europe, Eastern Asia. Except for Great Britain, Tesco run outlets in the following countries: Ireland, Hungary, Poland, Czech Republic, Slovakia, Turkey, Thailand, South Korea, China and Malaysia.

Fig. 7 Scope of operation of Tesco (source: own studies based on the concern's data, www.tescocorporate.com)



Tab. 9 Expansion of Tesco into foreign markets (1994-2004) (source: own studies based on www.tescocorporate.com)

Year	Country	Year	Country
1924	Great Britain	1998	Thailand
1994	Hungary	1999	South Korea
1995	Poland, Czech Republic	2001	Malaysia
1996	Slovakia	2003	Japan, Turkey
1997	Ireland	2004	China

In the middle of the nineties Tesco decided to take up investments in the countries of Central and Eastern Europe. The first outlets were located in Hungary (at present approx. 130 stores). The largest chain the in region, Tesco operates in Poland including 330 establishments. At the end of the 1990s Tesco started to expand into the Asian market, entering both, the emerging market countries (Thailand, Malaysia, China) and countries having strong retail trade markets (South Korea, Japan). In 2006 there were already 901 stores operating in the Asian market, most of them in Thailand (Tesco Lotus) – 532, Japan – 144 and South Korea – 142. The dominant form of Tesco establishments in those countries are Tesco Express outlets. Only in China the chain's strategy is to locate mainly megastores (57 outlets). Great Britain remains the largest market of Tesco operation, with over 1,800 establishments (type: extra, metro, superstore, express etc.), employing 260,000 employees. The value of sales on the territory of Great Britain constitutes ca. 80% of the total sales value of the whole company (www.tescocorporate.com).

One of the characteristic features of Tesco localisation strategy is taking over chains of shops in the countries of

expansion. It may be illustrated as follows (according to www.tescocorporate.com):

- Victor Value in England, 1968 (sold in 1986)

- William Low, Scotland, 1994

- Quinnsworth with Crazy Prices chain, Ireland, 1997

- HIT supermarkets, Poland, 2002

- T & S Stores, Great Britain, 2002

- C Two-Network, Japan, 2003

- Kipa markets (majority shareholder), Turkey, 2003

- Julius Meinl supermarkets, Poland, 2006

- Leader Price supermarkets from Casino chain, Poland, 2006

- Carrefour megastores, Czech Republic, 2006.

In 2007 the Slovakian antimonopoly office stopped the take over of Carrefour establishments, recognising that without any major competitor, Tesco would become a monopolist in Slovakia. In Poland, due to toughened regulations and administrative impediments in the localisation of large format retail stores, the next stage of Tesco expansion has just begun. Since 2006 the giant establishes small format stores – Tesco Express, thus competing in the megastore segment with other foreign retailers (Metro, Carrefour, Auchan) and in the segment of resident's shops (supermarkets) with foreign and domestic concern's discounts (e.g. Netto, Lidl, Biedronka, Polomarket).

Fig. 8 Localisation of stores Tesco in Poland in 2008 (source: own studies based on the concern's data, www.tescocorporate.com)

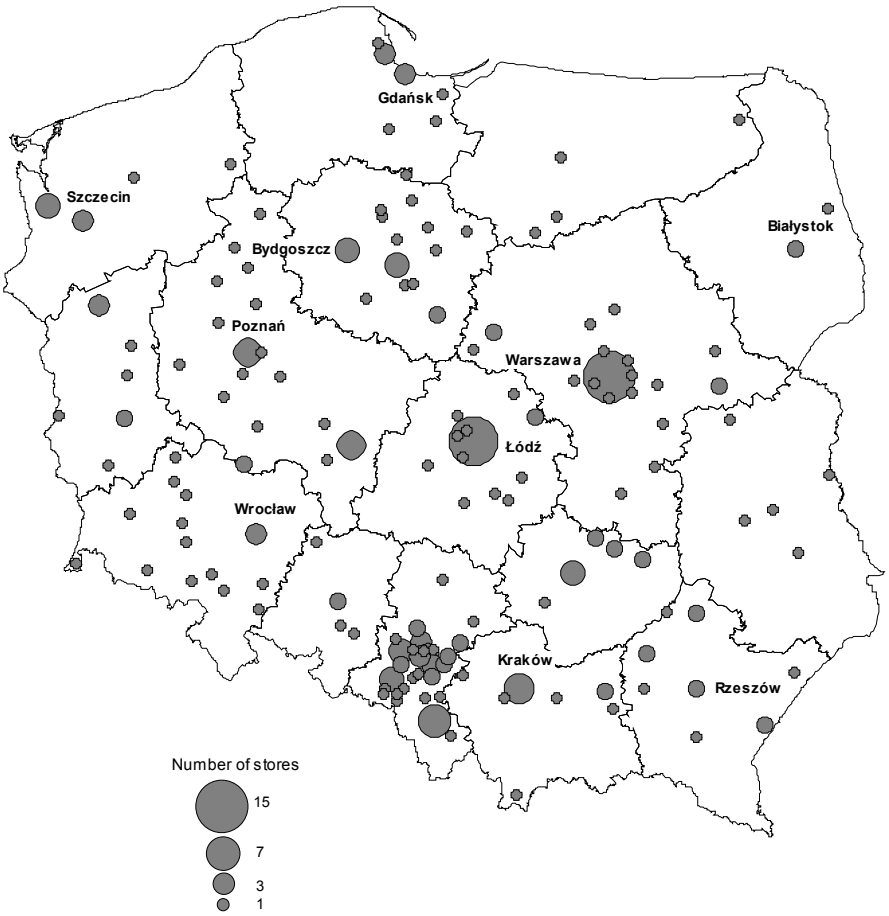


Fig. 9 Tesco, metro format in Liverpool (author's photograph)

Fig. 10 Tesco, medium format: food supermarket in the centre of Bratislava (author's photograph)

Fig. 11 Tesco Megastore on a housing estate in Poznań (author's photograph)

6. Conclusions

Retail trade is one of the sectors of economy which development is driven by the globalisation process. Free flow of capital contributes to stronger and stronger expansion of foreign trading giants, which in 90% originate from the USA, EU countries and Japan. Almost 60 % of the largest trading companies have transnational area of operation, many of them operate on several continents, some on the territory of several dozens countries. The development of trading markets in the last 20 years in connected with the origin and development of the so-called emerging markets which, faced with lack of domestic capital and competitive national companies, have become the area of expansion of foreign companies (Kaczmarek T. 2007).

For years the retail trade has been showing a continuous growth of income and strong dynamics, in particular in the developing countries. The financial crisis of the end of 2008 will relatively reduce the dynamics, but certainly will not eliminate the foreign expansion of retail trade sector operators. Two-thirds of the analysed concerns announced further investments and development, proving a considerable potential and reserves embedded in this sector of economy (Einzelhandel wirb weiter 2008). Further foreign investments in new markets are announced (e.g. Aldi, in Poland, Carrefour in Russia), together with strategies strengthening their position on the already occupied areas (e.g. Tesco or Metro in China, Carrefour in Brazil).

On the global scale, large and under-invested markets will become more and more important. According to the expert opinion of A.T. Kearney (Growth opportunities for global retailers 2008) for 185 countries, the most attractive markets in respect of retail trade investments include (in this order): India, Russia, China, Vietnam, Ukraine, Chile, Latvia, Malaysia, Mexico and Saudi Arabia. The countries constitute enormous markets for the expansion of the giant traders due to economic development, increase of the purchase power of the population and the growing demand for consumer goods. From the other side, the countries observe their domestic traders to develop, stronger and stronger competing with the global leaders. There are already 4

concerns from China (Bailian Group, Sunning Appliance Co., Gome Electrical Appliances, Dalian Dashang Group), 2 companies from Russia (X5 Retail Group, Euroset Group) and 2 from Brazil (Casas Bahia SA, Companhia Brasiliera de Distribuiçao) listed in Top 250 biggest world retail traders. It means that the spatial structure of the retail trade on the regional scale is slowly changing, and most probably will also be changing on a global scale in the future. Having strengthened their position on the domestic markets, native companies should be expected to expand into foreign markets, the under-invested and the ones with strong competition (e.g. first attempts of Polish traders to enter the European market).

As shown by data from 2001-2006, foreign expansion of trading companies have significantly contributed to the increase of profits. Those who operated in 1-2 markets only noted an average sale rise by 8.7 %, companies operating in more than 10 countries recorded 10.6 % increase. The net profit of concerns operating on the domestic market only was 3.1 % while of the transnational companies – 4.7 % (Global Power of Retailing 2008). The simple comparison proves that the force of globalisation in retail trade is still dynamic.

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Social factors affecting the development of rural areas in Poland

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Abstract

The paper focuses on rural areas, which cover ca 75 % of todays Poland. This fact makes Poland one of the most significant agricultural power of Europe and is reflected in many economic programmes aiming at further development of agriculture. The author especially analyses the social determinants of Polish rural areas related to social security and social benefits issues.

Keywords: social capital; cultural capital; trust; local community; old industrial region

1. Introduction

Economic programmes aimed at developing rural areas and agriculture in Poland rely upon the concept of multi-functional development based upon departing from agriculture's single functionality. Extra-economic functions of rural areas and agriculture are gaining more attention, for example environmental as well as social and cultural functions. They actually determine the settling attractiveness of rural areas in the light of contemporary urbanisation changes. However, rural regions in Poland are largely diversified both economically and socially. These developmental differences have been affected by a number of factors: historical, political, economic and social. Even now (after nearly 100 years) Poland bears the traces of the Partitions borders along which various social and economic phenomena take place, especially in rural areas. The post-war restrictive policy as executed by the communist regime with respect to agriculture - the only surviving private sector of the economy -opened a widening developmental gap between rural and urban areas.

After 1989 the development of Polish rural areas was chiefly stimulated with political and economic factors including restructuring of economy (privatization and commercialization of state agriculture), unemployment, inflow of foreign capital, development of small companies,

disintegration of services, growth of competitiveness of an economy influenced by globalization (Marczyńska-Witczak 1998; Bański 2005, 2006). Changes occurring in the social and economic structures of Polish rural areas and agriculture have also been fashioned by globalisation processes, especially integration into the European Union (pre- and post-accession grants and programmes).

In Poland, rural areas represent over 93 % of the country's total area. They are inhabited by nearly 39 % of Poland's total population, an indicator above the EU average (36 %). This ruralisation indicator tends to be quite diversified regionally (ranging from 22 % in Silesia to 60% in the Subcarpathian area). This diversified regional level of development in rural areas stems to a large extent from the post-war agrarian structure of agriculture largely dominated by nationalized large-scale farms in the west and north of the country. These regions have been subjected to drastic restructuring processes after 1989. The rapid deterioration and slow restructuring of state-owned agriculture proved a social shock therapy, at the same time tarnishing the social and economic image of a State Agricultural Farm village, built up for decades. State Agricultural Farms would operate in the rural areas and agriculture system not only as business entities but also as settling units, becoming vital centres of economic and social activity. Unemployment became one of the most spectacular and at the same time crippling effects of restructuring state-owned agriculture. Even back in 2008 the unemployment rate in rural areas subject to privatisation of agriculture tended to remain the highest. Areas with small-scale individual farms prevailing in the agrarian structure face the so-called concealed unemployment, production satisfying only the farms' needs and non-existent prospects for rural development.

As little as approximately 10 % of the country's rural communes from suburban areas, border communes in the west of Poland, seaside communes and partly communes located in tourist areas, represent a strongly progressive type of development: highly dynamic, comparable with urban areas if not surpassing them, closing the gap between villages and cities.

Research of the development of rural areas has been conducted as part of various disciplines, applying the related indicators and analysis methods. Many theories of social and economic growth employ the city-country dichotomy with a division between cities, especially large, core-periphery ones and rural areas as the periphery.

In Poland the differences between the city and the country refer to nearly any area of social and economic life. In a demographic aspect, rural areas are more juvenile and at the same time demographically more senile, more socially masculinised, enjoying a higher total fertility rate and higher life expectancy than in the city. As for housing conditions and household equipment, while the average housing area tends to be larger than in cities, rural households enjoy poorer infrastructure and utilities. Education level in rural areas tends to be much lower than in cities. There are also acute differences in access to shops, healthcare services, education and culture. The gap between Polish cities and villages remains distinct. While transformation alleviated the situation in Poland's rural areas in the realm of social and economic phenomena whose development is determined by endogenous factors, the widening gap in economic indicators reflects rural areas' economic recession and at the same time defective activation programmes (Kaczmarek 2007).

The rural areas policy includes many social programmes supporting the development and shaping the social capital in rural areas. These results chiefly from the general social policy in Poland with the prevailing social integration (just like in the European Union). Social exclusion has been recognized the biggest threat to

contemporary social development. The social policy in Poland is administered by means of a system of social institutions with a special role allocated to social security. The relevant system consists of commune, county and voivodeship administration institution.

This article aims at presenting selected contemporary social problems plaguing rural areas in Poland in their geographical diversification with respect to social security activities. This is an indirect method of identifying social problems in rural areas in specific regions allowing for a quantitative approach to social problems of predominantly qualitative nature.

2. Polish social security tasks

The act on social security defines social security as "an institution of the state's social policy aimed at assisting individuals and families to help them out of predicaments impossible to solve when resorting solely to one's own authority, resources and capabilities". (Social security is the state's responsibility carried out by central and local authorities in co-operation with their partners: social organizations, religious associations, charity organizations and foundations. The statutory responsibilities relate to financial and material assistance (recognizing and paying out statutory benefits), rendering social services, developing new forms of social security and self-help in the realm of identified needs.

Material assistance prevails in the benefits structure in Poland, consisting chiefly in paying out benefits and allowances. However, contemporary social security has witnessed a growing importance of various types of active assistance supporting the social security beneficiaries in overcoming social and living problems.

Research indicates that the number of social security beneficiaries in Poland is growing. In 2007 it amounted to 2.3 million individuals which represented 6 % of the whole population. Statistics suggest that the total number of families benefiting from social security reached 1.4 million; bearing in mind the size of these families, benefits are bestowed on over 4.3 million individuals (beneficiaries).

Since 2004 the number of social security beneficiaries from rural areas has been growing and reached 45.1% in 2007. This figure exceeds the percentage of the Polish population living in rural areas (39 %) which indicates growing social exclusion in rural areas. The number of individuals benefiting from social security represents 14% of Poland's population in rural areas. **Fig. 1** presents the geographical diversification of social security in Poland.

Fig. 1 Social security offered in rural areas in Poland in 2007 (Source: author's elaboration based upon data from the Ministry of Labour and Social Policy)

In the north of Poland, social security is granted to over 20 % of the rural population. The geographical representation of rural areas' share in social security is highly correlated with the unemployment rate (correlation coefficient = 0.83). The regions least threatened with social exclusion and poverty in rural areas include south and central Poland (high urbanization level, high-yield agriculture). On the other hand, the northern regions are in a very difficult situation with the local rural areas paying the social costs of the decline of state-owned agriculture. The related social problems remain unsolved despite nearly 15 years elapsed since the conclusion of restructuring this sector of rural economy.

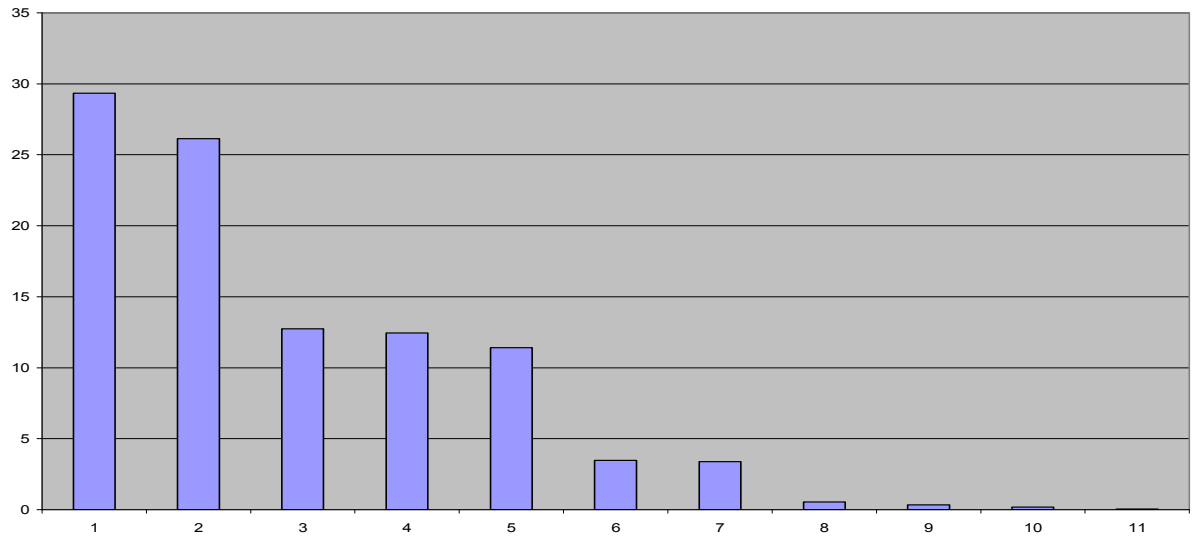
3. Reasons for resorting to social security

In Poland, poverty is among a dozen or so fundamental reasons for granting social benefits. An act on of 2004 states the following reasons for granting social assistance: poverty, orphanhood, homelessness, need to protect motherhood, a large number of children in family, unemployment, disability, long or serious illness, helplessness in providing care or education and housekeeping, domestic violence, alcoholism, drug addiction, adapting problems after leaving prison, inability to adapt among young people leaving orphanages, random events, crises and natural disasters.

The availed reports on providing social assistance allow for more detailed characteristics of the related social problems, especially the statutory subject matter of social security. Increasing social poverty, unemployment, social pathology issues, housing, healthcare and the education gap are regarded the most burning social problems in Poland; they tend to be the fundamental impediment to current social development (Ratyński 2003).

In Poland the chief reasons for resorting to social security include poverty, unemployment, illness and disability as well as helplessness in childcare and education. They tend to be reflected in the structure of reasons for granting benefits in rural areas (**tab. 2**). Therefore poverty and unemployment represent nearly 60 % of the reasons for granting social benefits to inhabitants in rural areas in Poland while 25 % beneficiaries suffer from long illnesses and disability. The other reasons include problems plaguing families with many children and with alcoholics (**fig. 2**).

Fig. 2 Structure of granting social benefits in rural areas (source: author's elaboration based upon data from the Ministry of Labour and Social Policy)



Explanation: 1. Poverty, 2. Unemployment, 3. Disability, 4. Long illness, 5. Many children in family, 6. Need to protect motherhood, 7. Alcoholism, 8. Domestic violence, 9. Homelessness, 10. Orphanhood, 11. Drug addiction.

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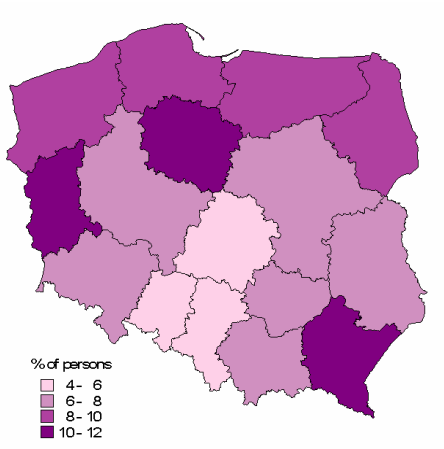
As opposed to the cities, in rural areas social security is frequently granted to families with many children (**tab. 2**). This relates to both the need for protecting motherhood, helplessness in childcare and education as well as house-keeping. The second most common reason for granting social assistance in rural areas is poverty, unemployment and alcoholism. Bearing in mind the small percentage of beneficiaries, one can conclude that in general drug addiction, orphanhood and homelessness accompany city life. In small rural communities, a traditional family still guarantees social safety. Loosening family ties in cities tend to trigger off social deviance. This leads to a preliminary conclusion that the reasons for resorting to social security in rural areas are frequently of economic nature while in cities tend to be more of social nature.

Fig. 3 and 4 present a regional diversification of the selected social problems behind applying for social assistance.

Tab. 2 Rural families as social security beneficiaries (source: author's elaboration based upon data from the Ministry of Labour and Social Policy)

Reasons for granting benefits	% of rural families
Poverty	**43**
Orphanhood	**23**
Homelessness	**13**
Need to protect maternity	**58**
Many children in family	**64**
Unemployment	**44**
Disability	**34**
Long or serious illness	**38**
Helplessness in childcare and housekeeping; total	**45**
including one-parent families	**33**
including families with many children	**65**
Domestic violence	**35**
Alcoholism	**40**
Drug addiction	**16**

Fig. 3 Percentage of individuals resorting to social security benefits on account of poverty (source: author's elaboration based upon data from the Ministry of Labour and Social Policy)

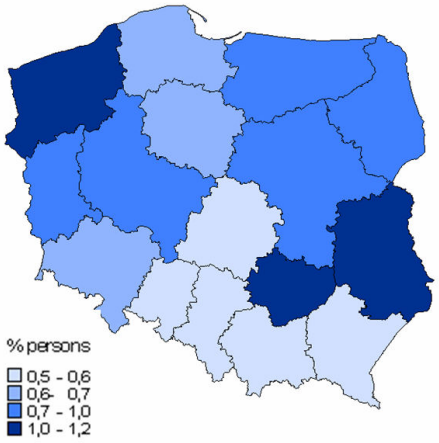


In the case of poverty, while the related percentage tends to be vary significantly from one region to another, the distribution is highly correlated with the percentage of individuals resorting to social benefits. This relationship stems from the fact that poverty is the main reason for granting social benefits. This holds true also for granting assistance on account of unemployment

An analysis of indicators related to alcoholism which tends to be a very common social deviance in Polish society indicates regions where this problem tends to persist (fig 3). While the regional diversification of the indicator is not considerable, the problem tends to be gravest in the areas hosting the most impoverished villages.

Families granted social benefits in rural areas are predominantly families with children, representing over 60 % of all benefiting families. The percentage of (old-age) pensioners (18 %) and incomplete families (12 %) granted with social benefits tends to be smaller than in cities. This is a clear indication that with respect to the poorest population, rural areas more than cities are hubs of traditional family models.

Fig. 4 Reasons for granting benefits – Alcoholism (source: author's elaboration based upon data from the Ministry of Labour and Social Policy)



The identification of social problems in rural areas with respect to social benefits

statistics reflects opinions of village dwellers polled on social problems in their environment. When asked about the poorest living conditions, they would indicate the unemployed (in post-communist state owned farms regions), smallholders and families with many children. When describing individuals excluded by the rural community, the respondents would most frequently refer to alcoholics. While officially condemned, alcohol abuse is a regular element of country life, most frequently referred to by female respondents. Another threat to social development, more and more frequently referred to in the opinion polls, included young people leaving the country to work abroad. On the one hand, the emigrants take the strain off domestic budgets in rural areas. On the other hand, the young emigrants leave both children and elderly people unattended. The latter perceive loneliness as the biggest concern.

4. Summary

In Poland, social exclusion is most readily visible in the countryside, as a rule more backward than the city, more affected by economic restructuring and the degradation of rural institutions, and lagging behind in terms of both infrastructure and education. The economic difficulties involved in the modernisation of the countryside and farming have been compounded by new, often much more serious, social problems giving rise to critical situations in the lives of individuals and entire rural communities (most severe in former State Farm areas). By resorting to social security activities, it is possible to present social issues accompanying the development of rural areas; these issues tend to be of negative character or related to dysfunction or lost opportunities. At the same time, it is possible to present the geographical diversification of the extent and intensity of the related social problems.

In identifying those problems, a special role is played by opinions of country residents concerning life in the country, chief categories and groups of social threats, and awareness of opportunities for development. The opinions of respondents coming from a variety of regions, and especially from functionally different villages, show the Polish countryside to be diversified, both spatially and socially. The socio-economic changes that have occurred so far make the differences even deeper, i.e. peripheral areas tend to become more and more isolated, while those integrated with big urban centres, more and more similar to cities.

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The role of soft factors in the attraction of creative class from the perspective of university students in the cities of Ostrava and Usti nad Labem

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Abstract

The current debate on regional development emphasizes the significant role played by accessibility of highly qualified labour force, which represents a key factor in the competitiveness of regions. This paper aims at the analysis of how soft factors are evaluated by a sample of potential members of "creative class", current university students. It is based upon the theoretical framework of soft factors, their typology and their role in the regional development, as well as the concept of s. c. Creative Class. At the same time, attention has been paid to how lifestyles are related to the perception of socio-economic factors in a particular area. This theoretical basis was a precondition for a survey carried out among university students in the cities of Ostrava and Usti nad Labem. The analysis of the collected data showed a significant difference between the two cities in terms of attraction for potential members of creative class.

Keywords: soft factors; Creative Class; lifestyles; university students

1. Introduction

The industrial character of both cities is reflected negatively in the overall quality of soft factors influencing the regional development. This fact makes it harder for both cities to compete for maintaining or attracting the "creative class". This study tries to analyze extensive empirical research and thus identify and interpret the importance of soft factors for the surveyed group – i. e. university students in the cities of Ostrava and Usti nad Labem. I'd like to explain why this paper is important, which new issues it raises, which questions it tries

to answer and which basic concepts or empirical studies it draws on. The structure of the paper is as follows: The first theoretical part focuses on the rising significance of soft factors and their basic typology. The following part deals with the concept of creative class in relation to soft factors, with the theoretical discussion being supplemented with the concept of lifestyles (including their dimensions) in order to create a link to the practical part of research.

2. Soft factors in regional development – a brief outline

The last decades have witnessed a gradual transformation of the traditional hard localization factors, especially in relation to the process of ubiquitization, as well as to the less accentuated soft factors. The competitiveness of individual regions reflects both types of factors. The transformation of the roles of hard and soft factors in connection with regional economic development can be explained in terms of transition of some regional economics from s. c economics of scale to s. c. economics of scope, or, in other words, transition from the predominant secondary sector to the tertiary and quaternary sectors of economics (Rumpel 2002). What is emphasized in the "new" knowledge-based economics is the role of highly qualified human resources in the region and their ability to generate innovations in a creative way. From the perspective of regional development and competitiveness it is therefore vital to attract and maintain these highly required human resources in the region by offering them high quality parameters of soft development factors (see Florida, 2002b, Clark et al., 2002). In this article we use – with certain exceptions (Bathelt, Glückler, 2002, Rumpel et al, 2008) – the typology of soft factors by the German authors Grabow, Hollbach-Grömig (1995), who divide localization factors into the following categories:

(1) Hard localization factors. Factors whose quality and level are primarily calculable. This category includes availability of qualified human resources, land (industrial zones) and offices, external transportation links (airports, railways, roads, water routes), state of transport infrastructure, price of land and buildings etc.

(2) Soft entrepreneurial localization factors. These have a direct impact on the activities of companies/ entrepreneurs. However, they are not primarily calculable (measurable), as they depend on a subjective evaluation of each entrepreneur/ company.

(3) Soft individual localization factors. They are a matter of personal preferences of both management and employees. They don't have a direct impact on a company's activities, but they influence motivation in the workplace and work efficiency. They play an important role in the choice of a place to live. In this sense, they become factors of stabilization of the current residents and attraction of new ones.

3. The concept of Creative Class

The concept of "Creative Class" was first introduced by the American scientist Richard Florida, whose book The Rise of Creative Class has become one of the most discussed works on regional development in the last years (Wojan et al 2007, Fritsch, Stürzer, 2007, Boschma, Fritsch, 2009). He focuses on s. c. Creative Class, which he views as the main stimulus to the current economic development. He bases his work on the presumption that highly qualified human resources are very mobile and choose jobs and places to live not only on the grounds of quality and status of the potential working position, but also with respect to the quality of living and free time. Countries, regions, cities and communities compete for highly qualified human resources. According to Florida, people do not concentrate in places where there are jobs, but in creative centres and where they want to live. He even disputes the prevailing opinion that clusters (see Porter 2000) are made on the grounds of agglomeration advantages connected with

the presence of companies, and says that they are made on the grounds of the presence of qualified human resources that generate the major comparative advantage – knowledge – in today's economics (Florida, 2005a, p. 29). Creative centres are, according to the author, economic winners. Their success can be seen in the fact that creative people want to live there. Companies follow people – or they are often founded by people in these centres. In contrast, cities and regions that fail in maintaining or attracting the members of "creative class" can be regarded as losers.

"Creative class" is according to the author a group of people whose economic function lies primarily in creating new ideas, technologies or content, i. e. people who add economic value by means of their own creativity (Florida. 2002a, p. 68).

"Creative class" can be classified into two major subtypes:

- "Super Creative Core" – a group whose work relies exclusively on intellectual qualities (creativity)

- "Creative Professionals" – people whose work is primarily connected with creativity, but which is closely linked with a specific professional orientation.

The members of "creative class" are concerned with solving complex problems, which requires a high level of independence and sound judgement – i. e. a high level of human capital. What the members of this class share is a valued system based on individuality, meritocracy, diversity and openness (Florida. 2002a, p. 77) as well as on a specific, high work motivation (Florida. 2002a, p. 100). Other categories are s. c. "Working Class", "Service Class" and "Agriculture".

The main strategic factors that determine a successful position of a region in connection with "Creative Class" are according to Florida (2002a) 3T factors of economic growth:

- Technology,

- Talent,

- Tolerance.

The presence of "Creative Class" is closely linked to the quality of a place, or the quality of soft factors – amenities. Some authors (e. g. Clark et al. 2002) consider amenities as a necessary condition for economic and demographic growth. Clark (2003) defines the following categories of amenities:

- physical-geographical factors – climate, humidity, temperature, accessibility of water areas, forests, overall attractiveness of environment;

- constructed factors – the number of large institutions, such as libraries, museums, opera houses, and small companies, such as bookshops, second hand bookshops, cafés, bars, restaurants – gastronomy, cycle routes;

- values and attitudes of the residents – amiability or unfriendliness, tolerance, willingness to take risks, individualism.

The question is what characteristics should be ascribed to places with a critical positive concentration of soft factors. The following summary includes the main aspects of such places (Florida, 2000 Florida 2002a):

(a) The higher is the Quality of Life, or the Quality of Place, the more likely it is that there will be a large concentration of enterprises with a high added value and highly qualified employees.

(b) Culture is a vital part of the needs of "Creative Class". Passively consumed highbrow culture (symphonic orchestras, ballet, opera, etc.) is not perceived by members of "Creative Class" as interesting, this class prefers alternative forms of culture which give them the opportunity to participate actively.

(c) Large Big Ticket Events (international football matches, world championships, Olympic Games, etc.) are not a main source of entertainment for the

members of "Creative Class". That is why "creative class" does not perceive such events as vital for the local quality of life.

(d) An important role is assigned to an attractive nightlife scene with a lively and authentic atmosphere and a variety of cafés, bars and music clubs. These represent the main places for social interaction.

(e) It is more important for the members of "Creative Class" to take part in common events of everyday character (outdoor and lifestyle activities) than on single grand events.

(f) The accessibility of activities should be as easy and as little time consuming as possible.

(g) Water areas also play a significant role in preferences.

The concept of "Creative Class" is subject to a number of critical discussions (e. g. Peck 2005; Wilson, Keil 2008). We have used this brief outline of the concept of "Creative Class" because we believe that university students are the core of the "Creative Class". This is, however, disputed by Markusen (2006), who sees the concept of "Creative Class" as fuzzy and too broad to define, and claims that talent, abilities and creativity should not be restricted to university education. A similar view is held by Mossig (2005), who believes that creativity should not be connected to the number of years spent at university. Despite these critical attitudes, we believe that university students are a relevant group to be studied, especially in relation to Creative Professionals.

4. The concept of lifestyles

In the part concerning "Creative Class" we have outlined the important role played by highly qualified human resources in economic growth. We would furthermore like to stress the importance of a socio-cultural attitude – the concept of lifestyles (e. g. Zukin 1998) – which is very useful with respect to the empirical part. Great social diversity, typical of postmodern society, is a result of individualization and social plurality. That is why today the traditional vertical social stratification gives way to the horizontal differentiation connected with specific consumer, regional, cultural and normative aspects (Helbrecht 1997). These are reflected in different lifestyles and in specific social and cultural milieus formed by groups of people with similar attitudes, dispositions and behaviour that distinguish them from other groups (Helbrecht, Pohl 1995). In German speaking countries, empirical studies use s. c. SINUS-typology. In the context of this work we find it useful to mention three of the eleven types (Helbrecht, Miester 2007): (a) Postmaterialists, (b) Modern Performers, (c) Experimentalists. Klee (2003) identified three seven lifestyle groups on the grounds of extensive research carried out in Nurnberg with the use of factor and cluster analysis. In the context of our research the group of Postmaterialistic Hedonists is relevant, as this is a group oriented on free time activities (Klee 2003, p. 67), which best corresponds with the lifestyle of students. Members of this group tend to live in older houses in the central parts of cities near to cultural scene, pubs and bars, which meet their requirements (p. 70). The above mentioned groups of lifestyles all include university students. It is therefore important to bear in mind that students can help regenerate inner cities. They can contribute to a social regeneration by the process of "studentification" (e. g. Smith 2005) and also to a functional regeneration because of their consumer needs. The empirical research of the concept of lifestyles makes use of four basic analytical dimensions defined by Klee (2001) as follows:

(a) Expressive dimension is connected with free time activities and consumer patterns

(b) Interactive dimension focuses on social competences of an individual,

e.g. preferences of different kinds of media, social networks.

(c) Evaluative dimension includes values, general preferences, traditions, etc.

(d) Cognitive dimension integrates e. g. personal experience, knowledge, attitudes, that are the reflexive perception of reality.

In our research we have taken into account all the above mentioned analytical dimensions, but above all the expressive dimension.

5. Results of the survey

The above-mentioned theoretical framework provided the basis for an empirical survey. First, main topics for the questionnaire were defined. Detailed specifications of the topics subsequently resulted in the formulation of individual questions. The survey was conducted in 2008. Respondents included students of selected universities in Ostrava (University of Ostrava, VSB – Technical University of Ostrava) and in Usti nad Labem (Jan Evangelista Purkyne University in Usti nad Labem) (**tab. 1**) The survey focused on students in their third, fourth or fifth years, because these people were either graduates (Bc. bachelor's degree) or future graduates (Mgr. master's degree) who would enter the labour market in the near future.

Tab. 1 Structure of respondents (source: authors)

University	Number of respondents		
	abs.	women (%)	men (%)
OU, VSB-TU	204	54,7	45,3
UJEP	153	61	38,8
total	357	x	x

In accordance with the theoretical basis, the research on students´ free time activities was divided into three parts: 1. location of the free time activity, 2. frequency of the free time activity and 3. evaluation of quality of the free time activity. There were several levels of frequency of free time activities: at least twice a week, at least once a week, at least once every two weeks, at least once a month, less often and never. The evaluation of quality of free time activities was based on grading: 1 stood for excellent, 5 for insufficient. One category of observed free time activities was culture, i.e. events and performances such as opera, ballet, classical music concerts, theatre, cinema, cafés, restaurants, clubs, discos, concerts and exhibitions. Active free time activities included all kinds of sport with the focus on cycle routes and public green spaces. Passive free time activities included also temporary cultural events related to celebrations or other events organised by the towns of Ostrava and Usti nad Labem.

Due to a low frequency of opera, ballet, classical music concerts and theatre, no further details of this segment of culture will be provided in this summary.

Cinema attendance illustrates a significant monopolization of the market in this free time activity. In Ostrava, the multiplex cinema in Futurum shopping centre has a dominant position, whereas in Usti nad Labem it is the cinema Hranicar. 20.6 % of students in Ostrava go to the cinema once a month, 44.3 % less often. Responses of students in Usti nad Labem show a lower frequency of cinema attendance – 49.7 % never, 38.6 % less often. The evaluation of quality of cinemas in Ostrava and Usti nad Labem (Mann-Whitney test, significance at 5% level) indicates major differences between the towns, with Ostrava achieving much better results.

Evaluation of cafés and restaurants is not easy due to the high number of these facilities, as well as a wide range of services offered and different standards of service. With regard to the size of Ostrava and its urban spatial structure, its territory was

divided into: 1. historic centre, 2. Stodolni Street with a high concentration of cafés and restaurants, 3. Hladnov with the halls of residence, 4. town district Ostrava-Jih (one third of Ostrava´s population, extensive residential area with blocks of flats) and 5. town district Poruba with a structure similar to town district Ostrava-Jih. Due to the location of the universities and the structure of respondents, the historic centre scored 64.2 % in the survey. Stodolni Street also gained a significant proportion compared to other parts of the town. In general, attendance at cafés stood at a similar level in both towns: 18.4 % in Ostrava and 15.2 % in Usti nad Labem. Mann-Whitney test showed a significant factor of attendance – cafés are visited more frequently by women than men. There is also a difference between the frequency of attendance at cafés and at restaurants. Frequencies in these categories are divided equally in Ostrava, whereas in Usti nad Labem the category "at least once a week" was the most dominant (31 %).

Clubs, discos and concerts are influenced by the same factors as cafés and restaurants, i.e. the high number of these facilities, wide range of services offered and different standards of service. In Ostrava, Stodolni Street is a place of major importance in this category, because students often go to clubs, bars and discos. The high frequency can be illustrated by means of cumulative relative frequencies, which amounts to 64.6 % in category "less often" in Ostrava, while in Usti nad Labem it is only 47.0 %. Regarding quality, the survey showed a significantly wider range of services in Ostrava.

When evaluating the exhibition venues, the town of Ostrava offers a wider range of this type of service. This fact can again be illustrated by cumulative relative frequencies: category "less often" amounts to 34.0% in Ostrava and 19.2 % in Usti nad Labem.

Active sport belongs to frequent free time activities, mainly due to the age of respondents. Students in both cities can choose from a wide range of sports. There are no differences in relative frequencies of sporting activities. The only significant difference, proved by the Mann-Whitney test, is in the evaluation of quality in favour of Ostrava. This result can be explained by a larger concentration of sports facilities in Ostrava as well as the presence of a number of sports clubs of elite national leagues.

There are differences between Ostrava and Usti nad Labem regarding the cycle routes and their users. While local cycle routes are used also by non-residents in Usti nad Labem, they are used almost exclusively by students with permanent residency in Ostrava of more than 10 years. The quality of cycle routes is considered better in Usti nad Labem.

The use of green spaces for active relaxation (going for walks, jogging, in-line skating) is influenced by their accessibility and facilities offered. The location of halls of residence and places where students live should therefore be taken into consideration. We assume that a higher value of relative cumulative frequency regarding the use of green spaces for active relaxation in Ostrava (category "less often": 78 % vs 64.1 %) is related to the central location of the halls of residence and Komensky Park and the fact that they are of an adequate size and location and are equipped with necessary technical facilities. Komensky Park is an attractive place for the future creative class thanks to ambitious plans in the field of residential development as well as the proximity to the town centre and a residential area. From the point of view of quality evaluation, there is no statistically significant difference.

Other characteristics focus on a number of specific questions regarding the willingness of the future creative class to stay in the town in case of satisfactory job offers. One of the factors connected to the physical characteristics of the towns is the evaluation of the cleanliness of public spaces, which proved unsatisfactory in the survey. In Usti nad Labem, this factor achieved the worst result of all relevant

evaluations in the survey. Its value amounts to an average of 3.27 in Usti nad Labem and 3.10 in Ostrava.

Students in Ostrava consider safety at night to be the worst of all relevant factors. The average value amounts to 3.23, compared to 3.16 in Usti nad Labem. Finding a solution to this problem requires considerable effort. Although the situation in this field may improve, its evaluation is usually largely subjective and the public perception of safety is likely to remain negative for a long time.

The last two questions connected with the evaluation of interest in public services focus on the so-called "events", i.e. temporary occasions organized by the towns such as various celebrations or other events to enhance the attractiveness of town districts, as well as on the management of resources and the evaluation of the exchange of information concerning developments in the town.

Similar relative frequencies were shown in the survey regarding attendance at temporary events organised by the public sector. Over 20 % of the students in both towns frequently participate in these events and enjoy them at the same time. Over 40 % of the students are in favour of the events, but do not take part in any of them regularly. About 30 % of the students are not interested in the events at all. This segment would require a further in-depth analysis of the situation.

Tab. 2 Evaluation of selected characteristics (source: authors)

		Ostrava [%]	Usti nad Labem [%]
Characteristic regarding safety	unsafe	42,20	57,50
	safe	55,40	41,20
Characteristic regarding cultural life	boring	8,30	52,30
	vibrant	91,20	44,40
Characteristic regarding the environment	polluted	90,70	87,60
	not polluted	8,80	10,50
Characteristic regarding physical attractiveness	unattractive	54,90	71,90
	attractive	43,60	26,10
Characteristic regarding entertainment business	boring	4,40	44,40
	vibrant	94,60	54,90
Characteristic regarding sports facilities	boring	9,80	32,70
	varied	89,20	67,30
Characteristic regarding shopping facilities	boring	9,80	34,60
	varied	90,20	64,70

Concerning the question about the exchange of information, students in Usti nad Labem show a higher level of indifference to developments in the town. 35 % of respondents report a lack of information, but at the same time they do not really mind it. On the other hand, the proportion of students who consider the lack of information to be a problem is similar in both towns: 22.7 % in Ostrava and 26.8 % in Usti nad Labem. Significant is the difference between the proportions of well informed students in Ostrava (46.8 %) and Usti nad Labem (28.1 %). A further research into the structure of information sources in the town and their evaluation would therefore be appropriate.

Soft factors characterizing the town are another example of elements in the location of future creative class. **Tab. 2** shows a better position of the town of Ostrava. Negative evaluation of the quality of the environment is an important finding and challenge, as it might represent a barrier to development despite the high levels of other soft factors.

Tab. 3 Evaluation of statements (source: authors)

		Ostrava [%]	Usti nad Labem [%]
The town is a modern town with good conditions for high quality of life	agree completely	7,40	2,60
	agree	63,70	31,40
	disagree	24,00	54,90
	disagree completely	1,50	7,80
The town is a town with prerequisites for dynamic development	agree completely	17,60	3,30
	agree	74,50	56,20
	disagree	5,90	33,30
	disagree completely	0,50	3,90
The town is dead with no events	agree completely	0,50	5,20
	agree	3,90	22,90
	disagree	59,80	59,50
	disagree completely	32,40	9,20
The town is an industrial town with a harsh environment	agree completely	19,60	26,10
	agree	50,50	54,90
	disagree	23,50	14,40
	disagree completely	2,50	0,70

An important indicator of future location of creative class is the evaluation of statements summarised in **tab. 3** below. The results confirm the perception of Ostrava as a town with dynamic development and good quality of life, but at the same time as an industrial town with a harsh environment.

In Ostrava a close link between the statements "Ostrava is a modern town with good conditions for high quality of life" and "Ostrava is a town with prerequisites for dynamic development" was proved, with almost 50 % of the students agreeing with both statements. Similarly, there is a connection between the statements "Ostrava is a modern town with good conditions for high quality of life" and "Ostrava is an industrial town with a harsh environment", with again almost half the students agreeing with both statements. Regarding Usti nad Labem, there is a strong connection between the statements "Usti nad Labem is a modern town with good conditions for high quality of life" and "Usti nad Labem is a town with prerequisites for dynamic development", with almost 30 % of the students considering the town neither a place with good quality of life nor a town with prerequisites for dynamic development. Similarly, half of the students do not regard Usti nad Labem as a town with good quality of life, but consider it a town with a harsh environment.

Students subsequently set priorities for development of the towns by listing evaluated variables, see **tab. 4**. Enhancement of physical attractiveness is the top priority in both towns. It will probably focus on reconstructing public spaces and buildings and refurbishing grey blocks of flats and unattractive brick buildings in the town. A statistically significant relationship between a negative evaluation of physical attractiveness and the priority given to invest in this field (grade 1) was confirmed in both towns.

Tab. 4 Development priorities of the towns (source: authors)

	Ostrava		Usti nad Labem	
	average	standard deviation	average	standard deviation
Cultural life	2,62	0,994	2,68	0,914
Physical attractiveness	1,76	1,016	1,61	1,026
Sports facilities	2,50	1,003	2,45	0,875
Entertainment business (bars, clubs, discos)	3,06	1,057	3,25	0,992

The final question involved the evaluation of the statement whether the student was considering living in the town after graduation from university, see **tab. 5**. Taking into account the answers to questions mentioned above, a lower interest was expected in Usti nad Labem than in Ostrava. By means of logistic regression, Wald statistics, the following categories were defined as main factors in deciding whether to live in the town: 1. whether the student has lived in the town for more than 10 years, 2. a positive response to the question regarding the environment.

On condition that the above mentioned criteria are fulfilled, the

probability of students´ willingness to stay in the town after graduation is six times higher than if they are not fulfilled.

Tab. 5 Willingness to live in the researched towns after graduation (source: authors)

		Ostrava [%]	Usti nad Labem [%]
Do you consider living in this town after graduation?	yes	34,30	22,20
	no	44,10	67,30

6. Conclusion

As the results of the survey suggest, Ostrava is more attractive than Usti nad Labem from the perspective of soft factors. Especially in the field of culture and entertainment Ostrava has a greater potential in maintaining members of "creative class", whereas the town of Usti nad Labem is characterized by a low level of quality of soft factors in students´ evaluation. The main drawbacks of both towns are the environment and physical attractiveness of buildings, which corresponds fully with the industrial characters of both towns. Considerable investment will be needed to eliminate these structural deficits. An important finding is the declared willingness to stay in town after graduation in case the student has lived in the town for more that 10 years and gave a positive response to the question on the quality of the environment. The proportion of positive responses is small taking into account that according to Czech Statistical Office (2006) there are 70 % of students coming from the Moravian-Silesian region at the University of Ostrava, 61% at the VSB – Technical University of Ostrava and 55 % at the Jan Evangelista Purkyne University in Usti nad Labem. The difference between the willingness to stay in the town and the proportion of regional students at universities implies a relatively high risk of "brain-drain" from both towns. It is logical that a lower quality of the labour market in both regions plays a key role. Nevertheless, current projects such as the participation of Ostrava in the project European Capital of Culture in 2015 or the implementation of extensive investment projects under the Integrated Development Plan suggest that the quality of soft factors will have a growing tendency, which in the medium-term horizon my contribute to a stabilization of potential members of "creative class".

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EVROPSKÁ UNIE

MINISTERSTVO ŠKOLSTVÍ, MLÁDEŽE A TĚLOVÝCHOVY

OP Vzdělávání pro konkurenceschopnost

UNIVERZITA J. E. PURKYNĚ V ÚSTÍ NAD LABEM

INVESTICE DO ROZVOJE VZDĚLÁVÁNÍ

Stimulation of human resources in regional development research issues (with emphasis on support of research potential in teh Ústí nad Labem Region)

In September 2009, the project titled "Stimulation of human resources in regional development research issues (with emphasis on support of research potential in the Ústí nad Labem Region)" (CZ.1.07/2.3.00/09.0175) has been launched, being financed by Operation programme "Education for Competitiveness" (Support area "Human resources in research and development"). Jan Evangelista Purkyne University in Usti nad Labem is the recipient of the financial support and the University of Economics in Prague is a partner of the project.

Photo from introductory meeting of the project team with kind attendance of rector of the JEP University, Doc. I. Ritschelová and rector of University of Economics, Prof. R. Hindls (27.10.2009)

The focus of the project is to improve, especially by means of top educational process, the qualitative and quantitative parametres of research environ aiming at the regional development issues in the Czechia, while ephasizing the Ústí nad Labem Region. The activities of the project aims at qualitative development of present-day researchers (profiling their competencies related to scientific, management and financial issues of research projects and in the area covering the transfer of research results and innovation to public and commercial sectors). Organization of workshops, seminars and lectures led by experts in the field wil be the most frequent type of project outcomes.

For more information please visit the project website at the begining of the year 2010 <http://sliz.ujep.cz>