EUROPEAN COMMISSION

SYNTHESIS OF THE RESULTS OF THE SURVEY ON THE SITUATION OF LOCAL DISTRIBUTIVE TRADES IN LESS-FAVOURED URBAN AREAS OF THE EUROPEAN UNION AND CERTAIN CENTRAL AND EASTERN EUROPEAN COUNTRIES (CEECs)

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Report by IP Strategies

February 1999

DIRECTORATE-GENERAL FOR ENTERPRISE

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A great deal of additional information on the European Union is available on the Internet. It can be accessed through the Europa server (http://europa.eu.int).

Cataloguing data can be found at the end of this publication.

Luxembourg: Office for Official Publications of the European Communities, 2000

ISBN 92-828-9040-6

Printed in Belgium

PRINTED ON WHITE CHLORINE-FREE PAPER

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Summary

Organisations

The survey produced a list of 1 612 organisations representative of local players throughout the 15 Member States and in associated CEECs:
- 45 % are intermediary organisations (chambers of commerce, development agencies, town centre management associations, etc.);
- 33 % are collective communities (local authorities, regional and provincial councils, etc.);
- 16 % are trade organisations (shopkeepers and employers).

All these organisations work together on a regular basis. They are primarily concerned with providing information, counselling and serving as intermediaries, but they also undertake actions to rekindle trade or to enhance the value of the urban area, with benefits to business activities.

The typology of trade

The development of retail trade in Europe has generated four major types of commercial hubs likely to create potential demand: retail warehousing, shopping malls in the outskirts, town centres and intermediary shopping areas made up of the business fabric in the various neighbourhoods and of secondary traditional hubs. These last two elements are an amalgamation of traditional business, made up of smaller stores, and a large proportion of self-employed managers.

Generally speaking, all traditional businesses are declining, either slightly or heavily, in zones surveyed. Nevertheless, major differences can be found:
- The most badly hit businesses are grocery stores, textile shops, furniture and hardware stores, clearly on the decline in all countries.
- Those mostly untouched are bars/pubs, pharmacies, insurance companies and garages, for which business has reached a ceiling or is on a slight downswing.
- Other types of trade are on a moderate downturn, including department stores where business follows the drop of purchasing power in the zone.

The only distinctly growing activity is teleshopping, a buoyant and borderless business that follows directly from the sector's growth rate.

Problems met

Problem zones are mainly located in intermediary shopping areas (40 % of cases in inner city suburbs, 32 % in other neighbourhoods, 14 % near railway stations) that are 'stuck' between the better performing facilities in the outskirts and historical districts, which have their own problems (20 %). In 3 % of cases, the entire city is the problem area.

Problems stem from various sources.
- The weakening of shopping areas caused by competition from other commercial hubs and the depletion of the catchment area.
  - *Competition*: intermediary shopping districts, and to a lesser extent downtown areas, suffer from the competition of shopping malls in the outskirts or around the town's centre, superstores with or without shopping galleries, and retail warehousing. The effect of this outlying competition is twofold: loss of customers and loss of attractiveness due to the relocation of dynamic business activities.

- *Depletion of catchment area*: the depletion of the catchment area has a quantitative aspect, in that the number of households declines, and a qualitative one, associated with the loss of purchasing power and the ghettoisation of the zone.

— Economic gaps generate social repercussions (insecurity, vandalism and delinquency) that are relayed by the media which give the zone a bad reputation. And as its commercial function is a spin-off effect, supply becomes rapidly weaker and weaker. Setting up a business in a neighbourhood is insufficient to revitalise it, but business picks up when a neighbourhood is revitalised.

Answers provided by organisations are twofold:
1. The will to reinforce traditional trade. Actions undertaken in this frame are mainly concerned with short-term results, i.e. implementing commercial events and readjusting image problems. This approach attempts to support business activities regardless of their setting.
2. The will to reinforce areas, namely a downtown area or an urban shopping nucleus. Actions undertaken in this frame fulfil both short- and long-term objectives. This is a comprehensive approach underlying the search for interests that are common to the various players concerned with that area, and is often characterised by the setting-up of local partnerships involving the public and private sectors (occasionally associations) and by resorting to town centre managers.

In fact, the actions referred to in this survey are usually implemented to point out the slower and more difficult development of a vaster downtown management tool. In addition to their immediate and short-term effects, these actions aim at reinforcing the credibility of downtown managers, shopkeeper associations or any other group involved with rekindling the downtown area.

Urban shopping nuclei fulfil a variety of needs such as housing, education, culture, trade, health care, etc. If one of its components deteriorates, the entire city suffers from it. Unfortunately, too few people have an overall and long-term vision of this as they focus on problems that affect them directly without consulting with all the players dealing with the improvement of life in downtown areas. This survey shows the importance of teaching people to set up partnerships as part of an overall programme aimed at reorganising urban areas and managing town centres in the broad sense. The commercial part is only an element of this policy.

Expectations of organisations

Organisations polled expect public authorities, and to a certain extent the European Commission, to undertake the following actions:
1. Inventorise and help select the most efficient means to fight against commercial deterioration in these zones.
2. Inventorise and help select the most efficient means to fight against social deterioration in these zones.
3. Enable an exchange of experiences on the best practises and on the repercussions of actions under way.
4. Circulate information regarding EC initiatives (such as the URBAN programme, finalising joint projects, etc.).

Achievements

In the course of the survey, over 200 organisations outlined the actions which had been planned or are currently under way:

— Nearly half the actions aim at improving the overall image of the zone in order to fight against the neighbourhood's bad reputation as well as the ensuing commercial and social deterioration.

— One quarter of actions seek to revitalise the zone by instilling renewed energy.
— The remaining actions are basically concerned with counselling, informing, training and assisting in the search for means of action and partnerships.

The large number of examples have not been listed as 'good practices', but rather as the reflection of two facts:

1. There are many actions for retail trade in disfavoured urban zones in large European cities.
2. People are anxious to compare their actions in order to improve both the quality and efficiency of these actions.

Furthermore, a large majority of these examples of actions can easily be transferred from one zone to another.

Introduction

1. Framework of study

With the publication of the Green Paper on commerce in 1997, the Commission initiated a wide discussion on the role of trade in the European Union. The initiative prompted a number of reactions and proposals, such as that of seeking to promote neighbourhood stores in eligible urban zones as part of the third multiannual programme for SMEs (1997–2000) within the European Union.

The first stage of this process dealt with surveying local players (administrations, development agencies, chambers of commerce, shopkeeper associations, etc.) in the 15 Member States and in central and eastern European countries (CEECs) concerned.

Following an invitation to tender, IP Strategies was appointed to fulfil this mission. We hereby present the results of the survey in a summarised form.

2. Object of survey

The survey pertains to neighbourhood stores in eligible urban zones within the 15 Member States of the European Union and in certain CEECs.

'Neighbourhood stores' refers to retail business activities for staple consumer goods aimed at households on a market radius of a small number of customers. Any commercial hub, regardless of its overall attractiveness, is likely to serve as a neighbourhood store for some of its customers.

In Member States, eligible urban zones are urban zones included in Objective 1 areas, i.e. regions lagging in development (with a GDP per capita normally equal to 75 % or less of the average rate in the economic union) and in Objective 2 areas, i.e. those in industrial decline according to the terms of the Community classification of Structural Funds. Zones eligible for the implementation of the URBAN initiative implemented by the Directorate-General for Regional Policies of the European Commission (Regional Policy DG) have also been surveyed.

Limitation to a certain number of zones can be explained by the fact that the European Commission has financial means to intervene in these zones only.

This summary is divided in two parts. The first deals with the quantitative analysis of results and the second, with a more qualitative aspect, inventories examples of actions undertaken by field organisations for neighbourhood stores.

Analysis of results

I.1. Situation of trade in the zone

The development of retail trade in Europe has generated four major types of commercial hubs likely to create potential demand: retail warehousing, shopping malls in the outskirts, downtown areas and intermediary shopping areas, made up of secondary traditional hubs and the business fabric in the various neighbourhoods. These last two elements are an amalgamation of traditional business, made up of smaller stores and a large proportion of self-employed managers. These hubs can be found throughout the zones surveyed with varying degrees of significance.

Retail warehousing

Also referred to as 'shoebox industrial parks' because of their architectural 'quality', these are made up of a more or less organised amalgamation of moderately large specialised shopping areas. The development of these areas occurred on an ad hoc basis with little regard to environmental integration or any specific trade policy. The location and operation of these parks are based on the 'category killer' rationale: they are always located in the outskirts, on a cheap site, and if possible not too far from a shopping mall or a department store. Thanks to a large number of free parking spaces, consumers often drive to the site to find aisle after aisle of specialised articles (toys, furniture, sports goods, footwear, etc.) at a low price. This type of commercial structure is also found near main highways just outside city centres. The neighbourhood store aspect of these parks is extremely low.

Shopping malls in the outskirts

Advantages of outlying shopping malls are tied to three aspects: location, building design and overall management.

Location guarantees easy access by car as well as large, free parking spaces. The no-hassle parking space aspect is further underlined by the fact that all car parks are located on the same site and are often open-air.

Building design is another major asset specific to shopping malls. They must be designed so as to ensure that the number of customer visits is balanced between the various areas of the mall and the 'magnet' stores. All units are adjustable areas which can be divided up or combined, smaller spaces can be joined to moderately large T-shaped or L-shaped shops, etc. And of course, the mall's air conditioning system ensures the same shopping comfort in summer as in winter.

The third group of advantages is directly connected to overall management, which integrates a trade policy and a set of internal rules and regulations. The mall is designed as a product (including commercial events); the manager creates a balanced commercial mix that includes the various types of business activities in a pre-set proportion. In addition to personal and household equipment, the mall must also house a bookstore, a bakery shop, a pastry shop, a hairdressing salon, a travel agency, etc. Building the mix is conditional on the rent per square metre, which varies according to the type of business activity. The marketing aspect of shopping malls is therefore achieved using a sliding scale of rents, the effect being that two shopkeepers using an identical area within the mall will pay different rents according to their business activity. This practice is of course unthinkable in a downtown area where every owner seeks to make optimum use of his/her property; as a matter of fact, high streets have become the exclusive domain of international distribution chain stores mainly dealing with personal equipment, the only stores capable of paying the highest rents, while other types of business find shelter in adjacent streets. The commercial diversity of shopping centres is more a perception in a confined area than an actual multitude of shops: indeed, the one or two hundred outlets of a shopping centre are no match for the 600 or 800 shops of a downtown area, but the latter are spread out on a much larger, less consistent area, and not designed solely for business purposes.

The second aspect of shopping centre management is the set of internal rules and regulations, which all occupants and managers are contractually required to comply with (any infringement will be subjected to prosecution). Rules and regulations include, in no particular order, the mall's business hours, duration of display lighting, terms and conditions of shop management (no massive discount sales or permanent stock clearance sales), terms and conditions for all shared areas (no panhandling, no peddling, no public orators, no distribution of leaflets or brochures, no surveys, no photographs for commercial purposes, etc.), parking usage (shop managers and their personnel using customer parking spaces will be prosecuted), sourcing management, security and surveillance (security cameras), cleaning and maintenance, refuse and rubbish management, compliance with good reputation, etc.

In a very efficient way, shopping centres have optimised the commercial function of downtown areas in all respects by eradicating all forms of nuisance. Paradoxically, the single function shop where every person is a potential customer determined to buy something, appears to generate a few problems in the long run in terms of social interaction and atmosphere.

The neighbourhood aspect of outlying shopping malls is marginal compared to their regional attractiveness.

Town centres

The attractiveness of town centres is much broader than that generated by the sole commercial function. Town centres are rich with events past, history and values difficult to summarise in a few lines but which obviously remain firmly rooted in the collective unconscious, and are probably their greatest asset in the face of progress.

The greatest setback of downtown areas is that they have no commercial identity. They are made up of a multitude of bodies and players whose sometimes diverging interests, not always commercially-oriented, seem difficult, if not impossible, to reconcile.

The convenience aspect is important to town centres in general and for some of its segments in particular.

Intermediary shopping areas

Geographically speaking, these areas are located somewhere between town centres and outlying commercial facilities. Here we find neighbourhoods close to railway stations, shopping fabrics of traditional neighbourhoods and secondary hubs as well as suburban shopping hubs. The neighbourhood aspect is fundamental for these areas, as some serve specifically as convenience hubs. Our survey primarily concerns town centres and intermediary shopping areas.

In the survey, organisations outlined the current situation for various types of trade and associated services by using a grade between 0 and 4 with the following scale:
0: does not apply to this zone;
1: this type of trade has disappeared from the zone;
2: this type of trade is declining in the zone;
3: the situation of this type of trade is stable in the zone;
4: this type of trade is expanding in the zone.

For each type of trade we computed an average value (excluding 0 which means the type of trade was not applicable) and arranged them in descending order. Of course, some businesses are better performing than others:

— Teleshopping activities, bars/pubs, pharmacies, insurance companies, gas stations, department stores and bookstores are doing better than average.

— On average, not a single business is actually growing, except teleshopping for which the number of observations was rather limited.

— Bars/pubs and pharmacies are stable.

— It should be noted that even department stores are experiencing a downswing in these areas. A grade of 2.73 indicates that on average these businesses are below the level of stability and are therefore declining. The department stores referred to here are usually food supermarkets, non-food being reduced to a strict minimum.

— The fact that over half the zones in our sample answered 0 for department stores indicates that there are no department stores in more than 50 % of zones. We compared the levels of other businesses, whether or not there was a department store in that area, but we obtained no significant differences. Apparently, department stores are like any other business in these zones and do not seem to play a powerhouse role.

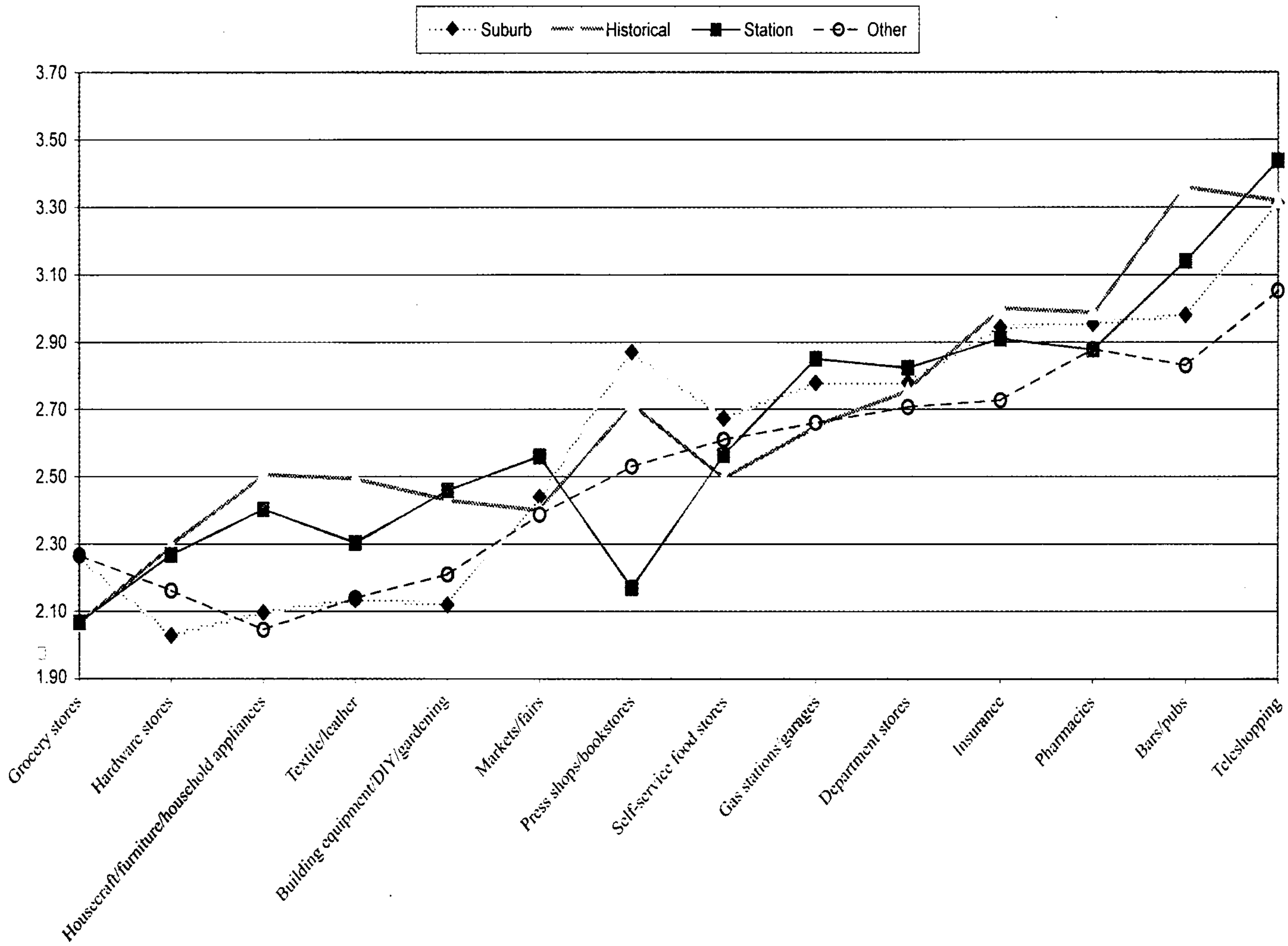
— The very strong competition exerted by department stores is partly explained by the very poor results of grocery stores.

— Markets and trade fairs are also experiencing difficulties: this prompts many organisations to undertake some sort of action in order to maintain this type of business activity, which is often essential to the liveliness of a neighbourhood.

	Number of observations	*Mean*
Teleshopping	63	3.32
Bars/pubs	352	3.00
Pharmacies	357	2.92
Insurance companies	198	2.79
Gas stations/garages	264	2.74
Department stores	161	2.73
Press shops/bookstores	322	2.66
Self-service food stores	343	2.60
Markets/fairs	245	2.45
Building equipment/DIY/gardening	214	2.31
Grocery stores	343	2.23
Textile/leather	275	2.21
Homecraft/furniture/household appliances	284	2.19
Hardware stores	293	2.15

1.1.1. Situation of trade in urban zones surveyed according to location

Average grades were computed according to the location of the zone. It appears from the chart below that average values are similar to each other regardless of the location of the zone, with the exception of bookstores which suffer from a steeper decline in areas next to railway stations, and bars, which seem to perform better in historical districts and near train stations.



An analysis of the situation of the various types of trade according to size of city or zone provides no significant differences. Only department stores and markets and fairs seem to perform better in urban zones located in smaller cities, the size of which restricts the development of facilities in the outskirts.

1.1.2. Situation of trade in zones surveyed by groups of countries

Teleshopping showed healthier results in the UK. Department stores are expanding in southern countries (where the average rate is close to 3.25 against less than 2 in the UK). This trend is set against different backgrounds as the market share of superstores in 1994 for the sale of food-related products was 66 % in the UK against only 38.6 % in Italy.

I.2. Characteristics of zones

Organisations were requested to characterise the zones they were responsible for. Thanks to a rating from 1 to 5 we were able to classify these features by order of significance, the least significant were rated 1 and the most significant were rated 5.

	Number of observations	*Average*
Unemployment	370	4.15
Drop in purchasing power	362	3.70
Reputation	372	3.30
Drop in number of potential customers	356	3.30
Crimes	325	3.00
Declining industrial zone	300	2.86
Demographic decline	331	2.63
Car parking problems	353	2.57
Area accessibility	354	2.50
Significant immigrant concentration	330	2.40
High rents	322	2.30
High insurance	68	2.25

It clearly emerges that social and economic variables prevail in terms of zone characteristics. They appear in different forms:
- — unemployment;
- — drop in consumers' purchasing power;
- — drop in number of potential customers.

The large number of crimes and the bad reputation of an area are perceived as the results of a poor social and economic situation. A pattern of inevitability can be found in the development process: unemployment causes a drop of purchasing power, which in turn leads to a decline of commercial supply, loss of attractiveness, a drop in the number of potential customers, and so on. This spiralling effect produces situations of multi-layered destitution in which unemployment, an economically weak base, bad housing conditions, a mediocre environment, many occurrences of poor health and criminality can all be found in the same zone.

Problems relating to parking spaces seemed to be quite significant but concerned only a few isolated cases. Problems regarding rents, insurance, concentration of immigrants and accessibility were less significant.

The trade situation appears more like a sign of the vitality of the zone surveyed, rather than the driving force of that vitality. The commercial function once again proves that it is indeed a spin-off function.

I.2.1. Characteristics of urban zones surveyed according to location

Characteristics vary according to zones.

Suburb characteristics

- — Primarily faced with a very high unemployment rate and a drop of purchasing power.
- — Stand out because of their very bad reputation and the number of crimes.

— Inner city suburbs suffer a great deal less from industrial decline.
— Although this is not one of the main characteristics, the concentration of immigrants is a significant feature of inner city suburbs.

Development of areas near railway stations

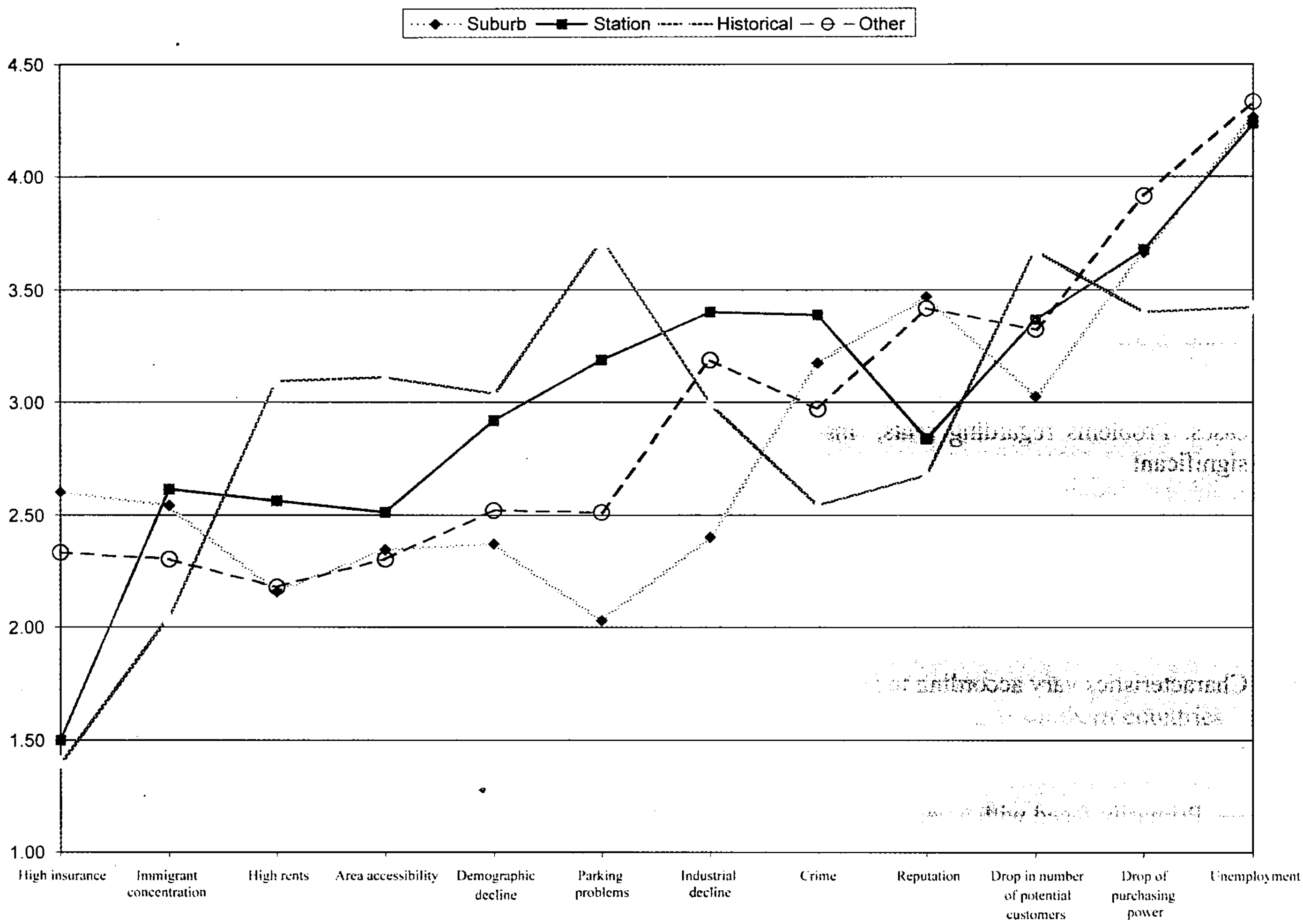
— Also affected by unemployment and a drop in purchasing power.
— On top of this we have industrial decline, major parking problems and a disturbing demographic decline.
— We also noted a very high number of crimes.

Deterioration cycle in historical districts

— These areas are primarily characterised by major parking problems, accessibility problems and very high rents.
— A very sharp demographic decline which leads to a radical drop in the number of potential customers.
— On the other hand, this type of area is much less affected by crime problems and reputation issues.

Particular characteristics of other areas in the city

— Characteristics quite similar to those of inner city suburbs though industrial decline is somewhat steeper.



I.2.2. Characteristics of urban zones surveyed according to country

The number of crimes in urban zones appears to be more worrying in the UK than in any other country. Insecurity-related problems seem therefore quite outstanding in eligible urban zones in the UK. We also see that demographic decline seems to affect eligible zones in Germany much more seriously. Parking and accessibility problems are frequent characteristics in urban zones in southern countries as these countries include many historical districts. The concentration of immigrants is a major characteristic of French inner city suburbs.

I.2.3. Characteristics of urban zones surveyed according to size of cities in which zones are located

The only significant distinctions pertaining to the size of cities (and of zones which grow in a similar way) are:

— high rents, which are generally steeper in large cities;
— parking problems, which are also more pervasive in large cities.

I.3. Problems met by shopkeepers in the zone

Organisations were requested to rank the significance of the various problems that may exist in a zone depending on its size. Grades ranged from 1 to 5 as already explained above.

	Number of observations	*Mean*
Prostitution	296	1.75
Vagrancy	296	2.00
Alcoholism	295	2.16
Difficulty of police intervention	319	2.54
Gang delinquency	309	2.55
Drugs	313	2.73
Vandalism	351	3.00
Insecurity	366	3.16
Competition from department stores	367	3.33
Competition from outskirts as opposed to downtown	348	3.33
Neighbourhood reputation	359	3.47
Competition from shopping centres	376	3.53

Competition problems stemming from outlying commercial facilities as opposed to the downtown area and intermediary shopping areas are considered by far the most significant. This discrepancy not only entails a loss of customers who are attracted by better-performing commercial facilities, but also a loss of attractiveness caused by the relocation of dynamic business activities.

Neighbourhood reputation, police intervention difficulties, gang delinquency, drugs, vandalism and insecurity are viewed as significant problems, but stem from economic problems.

Prostitution, vagrancy and alcoholism are considered less significant in the zones surveyed.

Organisations polled make no mention of problems relating to property taxes (key money, preemptive rights, etc.), commercial city planning, taxation (geographical discrepancies in terms of taxes on businesses), transportation management or quality of housing. They responded to the survey and considered these elements as part of the framework without questioning them.

Competition from trade in the outskirts is not the only explanation for declining trade in downtown areas. One of the most basic causes is the downtown population decline driven away by competition from other urban functions, or by ageing housing facilities ill-adapted to the development of ways of life. The development of commercial facilities in the outskirts or around the town centre exist throughout the EU, though the extent of this varies according to each Member State. The success story of the outskirts stems from a number of things, including the relocation of residential areas and the changes in living and consumption habits, such as having a car as the sole mode of transportation. This was the time of the great consumer surge of the 1960s, 1970s and 1980s and the development of Fordian cities: efficiency in single function areas.

Though town centres were perceived as economic players on the defensive, or rather as an eroding heritage, they have been enjoying renewed interest in the past few years from consumers and therefore by investors. Two reasons could explain this: downtown areas do what it takes to become fully-fledged economic players, including means of actions and the will to use their assets (as we will see in 'actions undertaken'), and the fact that society and values change for both consumers and decision-making people.

Two major trends seem to emerge, one linked to demographic development and the other to changes in consumer behaviour (what marketing people refer to as 'burrowing').

1. Single person households (people living alone), single parent households and young senior citizens are all on the rise throughout Europe. These are highly mobile population segments who prefer living in downtown areas. Will town centres be able to fulfil this increasing demand in terms of housing types, leisure activities, etc.?

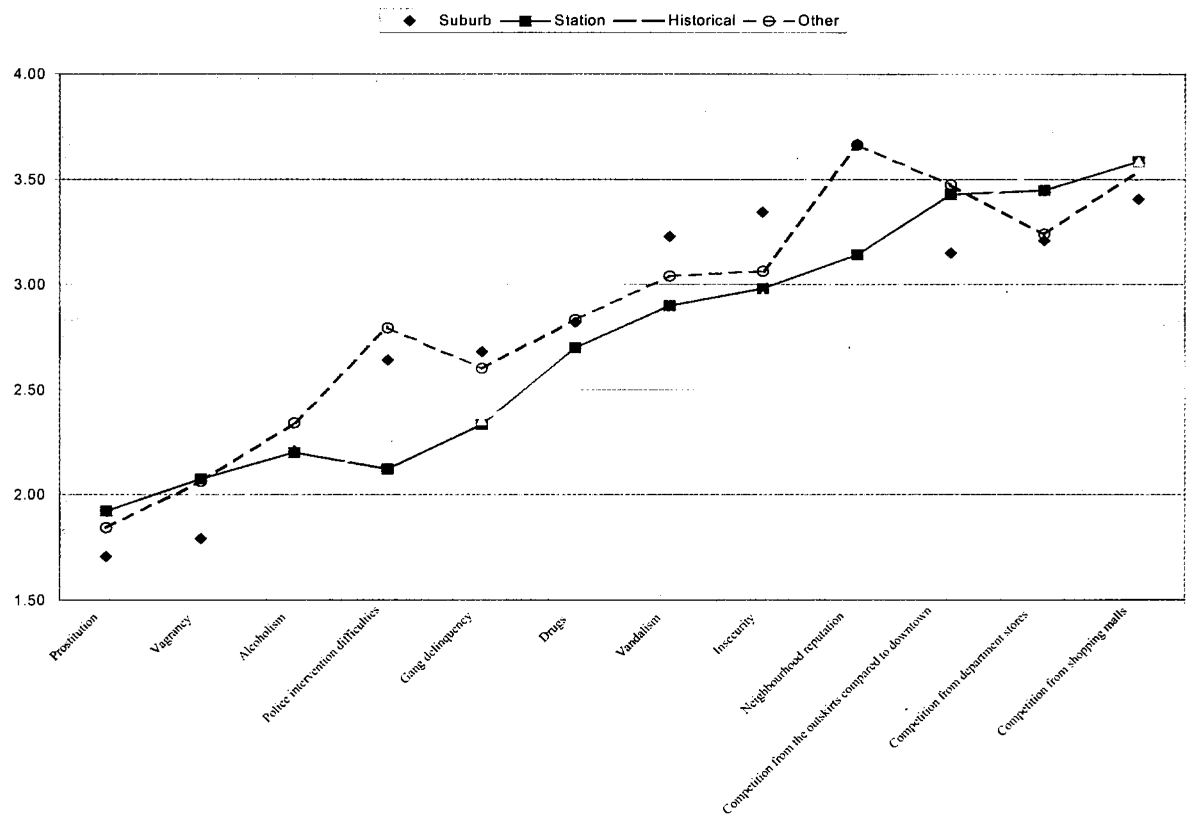
2. Faced with social problems extensively covered by the media (unemployment, poverty, violence, pollution, etc.) we see consumers clearly withdrawing into themselves and the emergence of a social awareness. Consumers change, they want a greater diversity of products, more personalised, more individualised, in short more subtle. They seek positive values, they express themselves through the act of buying and identify themselves with the products that convey positive images. At the same time, consumers are increasingly unfaithful to a specific brand, to superstores or to a shopping mall, easily shifting from one to the other. This unfaithfulness is connected to greater mobility and undermines shopping centres located in the outskirts, which risk losing a lot if a more attractive offer appears elsewhere. The only way of establishing customer loyalty is to offer reassuring and consistent points of reference, new collective values: these gilt-edged values include the family, one's own town or region. This is why small points of sale with a personalised service in a strong urban environment, a downtown area, are likely to generate a combination of pleasure and purchasing as well as to establish customer loyalty.

I.3.1. Problems faced in urban zones surveyed according to location

As indicated in the chart below it appears that gang delinquency, neighbourhood reputation, vandalism and difficulties for the police to intervene are more worrying in inner city suburbs. With regard to neighbourhood reputation, historical districts seem to encounter fewer problems.

Generally speaking, it is difficult to identify a problem with a certain type of neighbourhood; on the other hand, competition problems prevail in all areas.

As we will see later on, actions undertaken by the various organisations in this survey deal with revitalising neighbourhoods and improving the image of these areas.



I.3.2. Problems faced in urban zones surveyed according to country

Again, it appears that eligible urban zones in the UK are more affected by problems of insecurity stemming from vandalism and delinquency. On the other hand, they seem to suffer much less from department store competition. Eligible urban zones in Germany seem much less concerned by problems of insecurity, vandalism, delinquency and drugs. However, they seem much more affected by competition problems.

I.3.3. Problems faced by urban zones surveyed according to their size and the size of the city in which they are located

Difficulties related to police intervention as well as delinquency, insecurity and drugs are more significant in large zones of over 100 000 inhabitants, which are those most often found in large cities. According to the survey, prostitution problems are virtually nil in very small urban zones.

I.4. Implications between the various elements

Two major groups of problems emerge from correlation coefficients between characteristics and problems in zones. Problems pertaining to competition from the outskirts, department stores and shopping centres, which are at the source of deterioration, and problems associated with the qualitative and quantitative degeneration of the zone:

— the bad reputation of the area with problems relating to drugs, vandalism and alcoholism, which are significantly linked to occurrences of gang delinquency, insecurity, ghettoisation, etc.;
— demographic decline and drop in the number of potential customers;
— unemployment and drop of consumers' purchasing power, which establish the zone's impoverishment.

II. Action identification cards

One of the goals of the survey was to single out examples of good practices, or actions considered such by field organisations, in terms of neighbourhood stores in the various zones. Most of the organisations that took part in the survey filled in an action identification card. Thanks to these cards, we now know that many initiatives are undertaken in problem areas in order to resolve issues pertaining to commercial competition, bad neighbourhood reputation, repeated violations, etc. However, objectives vary from one organisation to the other. Some seek to reinforce a social player (the self-employed shopkeeper) while others aim at reinforcing a multi-functional area (the town centre or any other urban shopping nucleus).

In this list, we have selected those projects which seemed the most interesting and original to us. This sample of field experiences is likely to provide organisations involved with a number of leads in terms of methodology so that they may eventually draw useful lessons for their own action plan.

II.1. Description of types of action

Basically, actions undertaken are of two types: commercial revitalisation of zones and actions aimed at improving the image of these zones.

— In all, 40 % of organisations seek to enhance the value of the zone, i.e. improving the overall image in order to fight against bad reputation, with the resulting effects in terms of commercial and social aspects. A large range of tools exist to achieve this, including for example a focus on town and country planning: building renovation, decorating neighbourhoods and shops, lighting up streets and public areas, or smartening up pedestrian zones. Other organisations undertake actions with a view to improving security as well as the sense of security in neighbourhoods, such as urban stewards travelling throughout a downtown area in order to establish a presence and therefore to establish social control in a very socially interactive manner and also to reassure residents, visitors and shopkeepers. Yet other organisations devote their energy to creating a healthy environment in the neighbourhood and organise an increasing number of social and cultural activities for young people.

— A little less than 25 % of organisations deal with revitalising the zone with a view to maintaining and boosting business activities. These might include setting up trade committees, opening up a shopping mall which is cut off from other shops, boosting trade in a particular street, providing improved accessibility to shops or attracting new shopkeepers into the zone.

— 15.5 % of organisations merely provide information, advice and assistance to shopkeepers and companies in terms of new technologies, modernising facilities and equipment, human resource management, seeking new funds or setting up new businesses.

— The remaining actions consist of seeking or earmarking subsidies, improving consumer services, encouraging residents, shopkeepers and visitors in the zone to set up partnerships and work together in order to improve the standard of living.

II.2. Examples of actions in several European countries

The following list of actions is neither comprehensive nor exclusive, it is merely the reflection of action cards gathered during the survey. Many actions were undertaken at the same time in several countries. The fact that one particular action was carried out in one specific country has to do with the level of importance organisations attached to that type of action at the time of the survey. A survey is a snapshot of a situation at a given time. With that in mind, it is quite remarkable to note that the Belgian action (or proposed action) to prepare luxury magazines and a guide and map for the downtown area would appear as such, whereas town centres in France, which have been doing exactly this for many years, make absolutely no mention of it.

France

— Training on management of human conflicts in businesses: how to acquire self-control when confronted with a mugging and how to handle it.

— With a simple phone call, customer receives deliveries at home or at the working place.

— Various actions (renovation or reconstruction of new shopping malls, training for shopkeepers, commercial activities, etc.) to make shopping malls become the structuring element of the neighbourhood, to re-create a genuine town centre (funded by URBAN and the ERDF).

— Setting up factory outlet malls in a downtown problem area in order to attract customers. Outlet malls aim at selling branded goods at lower prices. This kind of shopping mall is rapidly expanding throughout Europe and the objective here is to make these malls serve as powerhouses.

Comments

Town centres in France can take advantage of major subsidies thanks to the 'Centre 2000' operation, managed by the Ministry of Enterprises and Economic Development. An original initiative was 'les vitrines' (displays) in France, set up in the early 1990s. The idea was to bring together the town council, chambers of commerce and shopkeeper associations for the benefit of town centres in general and small shopkeepers in particular. The operation was funded by FISAC (Fonds d'Intervention pour la Sauvegarde et l'Animation des Centre-villes, funded by taxes levied on department stores and superstores) which produced some excellent results in several cities. Unfortunately, FISAC funds are limited in time (three years) and the revitalising processes are greatly hindered by the lack of continuity.

Two associations share the representativeness of town centres: the Fédération Nationale des Centre- villes, established in 1993, which focuses on protecting independent trade, and the Union du Grand Commerce de Centre-ville.

United Kingdom

— Implementation of a video surveillance system (CCTV) and radio-linked networks to increase security in downtown areas and certain inner city suburbs (funded by the city council or by private/public partnerships).

— Subsidies to improve security of business-oriented premises and circulation of information regarding security (funded by URBAN).

— Implementation of a video surveillance system and radio-linked network in order to increase security of the population, shopkeepers and local authorities.

Comments

The continuity problem that exists in France was resolved by the British and Swedish experience of town centre managers, namely to create a structure co-financed by the various town centre players in order to have an effect on the centre. Hiring a town centre manager is the pragmatic result of this private/public partnership in the field. He or she acts as the interface, coordinator and project initiator. In 1990, there were 12 town centre managers in the UK; today, they are more than 220. The first town centre management committee was set up in Sweden in 1993; there are more than 60 today. A national trade organisation for town centre management exists in both countries. The concept of town centre management was thoroughly presented by the British Presidency during the informal meeting of ministers in Glasgow in June 1998 as part of the initiative for urban exchanges.

In addition, the UK has a 'code' for town and country planning that is very concerned about the protection of town centres ('Planning policy guidance 6: town centres and retail developments') as well as a specific government policy to encourage the development of town centres (Department of Environment, Transport and the Regions).

Belgium

— Luxury catalogue prepared in order to change the image of the downtown area (funded by shopkeepers, the city and sponsors). This type of project can easily be transferred to all town centres.

— Map and guide for town centres.

— Signposts put up to indicate cultural and tourist centres, displays of empty shops redecorated. This is an educational tool, as schools take part in the project, and one that enhances the value of public buildings.

— Urban stewards hired with a view to occupying space and increasing social interaction as well as the sense of security. These projects also serve as professional transition programmes for young job-seeking people.

— Town centre management committee. Setting-up of private/public partnerships as non-profit-making organisations, and hiring of town centre manager.

Comments

A city in Belgium (population 200 000) tried out the town centre management experience in 1996 thanks to a joint private-public partnership and public funding. The aim was to involve the private sector financially on the basis of substantial results. The first assessment of this experience was generally encouraging with some promising results for the future and the success (well covered by the media) of certain particularly innovative projects, such as urban stewards. The way in which this project was received by shopkeepers and consumers made it possible to identify requirements that will need to be fulfilled in the future. The private sector was involved financially in several projects and relations between the various partners have somewhat improved to the benefit of the town centre.

It was the private sector that set the pace in Belgium, in a pedestrianised street, spurred by the GIB (INNO) group and Marks & Spencer, with the formation of an informal partnership that was initially set up through completely private funds but was later opened up to public funding from the city in a 50/50 deal.

These initiatives prompted great interest from Belgian and French cities and communes. The pragmatic aspect of the idea and the clearly observable results in the field were proof enough that town centre management was primarily a common sense approach as well as a long-term job. As the interest increased, both the Walloon and Brussels Regions decided to 'prime the pump' following the example of the experience of a city of the south of Belgium by financing a few pilot schemes. At present, 17 Walloon town centres and 12 commercial hubs in Brussels are being professionally managed as part of a joint private-public partnership. These managers underwent specific training and were supported by a trade organisation, the Association du Management de Centre-ville, set up in 1997.

The Flemish Community launched its own programme, known as Mercurius, for the benefit of town centres; during the first phase cities were invited to have consulting firms carry out an audit as well as a commercial development strategy plan for their downtown areas. In all, 61 cities have had these surveys performed.

Germany

— Parking charges cancelled on Saturdays following shopkeepers' request (90 % funded by the city, 10 % by advertising).

— Forums organised to establish contacts and cooperation (projects almost entirely funded by Interreg II and Phare).

— City structures, public relations and organisation of various public events (concerts, theatre, etc.) reinforced and developed (funded by URBAN).

— Decoration of shopping streets, ornamental containers for trees, etc.

Spain

— Reorganisation of road traffic, maintenance of public highways, street furniture and commercial supply modernised in order to make it as specialised as possible (funded by the ERDF and town council).

— Through urban programmes in cities, actions aimed at obtaining areas reserved for multi-purpose commodity markets (or commercial markets) in urban centres (funded by shopkeepers).

— Professionalising the existing structure of shopkeeper associations in three phases: awareness building, survey and action plan. Joint actions undertaken by shopkeepers supported by the chambers of commerce and the town councils.

— Associations for marketing management, image cohesion and lower advertising costs.

— Subsidies for local trade facilities. Organisation of promotion and advertising campaigns in cooperation with local trade.

— Training for shopkeepers on new technologies adapted to companies.

— Renovation of markets located in particular architectural sites.

Comments

Courses of action undertaken by trade unions to protect traditional trade are very active in Spain, through federations of independent shopkeeper associations such as Comerç Actiu in Catalogna.

The Netherlands

— Amalgamation of department stores, services and hotel businesses in an attempt to save neighbourhood stores.

— Merging of shops spread out through shopping malls.

Comments

A number of Dutch cities, such as Rotterdam, The Hague, Amsterdam and Utrecht have information centres (city informatiebank) which serve as both urban research institutes and public relations committees. The Nederlandse Vereniging Binnenstedelijke Ondernemers is a federation that groups 31 town centres.

Italy

— Restoration of houses, buildings, street lighting and pedestrian streets in historical districts.

— Selective organisation of markets, shops open all evening and meals served in the street.

— Specialised areas set-up.

Comments

Just as in Spain and France, a trade union movement for the protection of independent trade claims representativeness for town centres. The Confesercenti Italiana is very active in protecting urban shopping hubs and fighting against trade in the outskirts.

II.3. Actions by groups of countries

It appears clearly enough that actions aimed at improving the image of a zone are mostly undertaken in countries in the south and in the United Kingdom.

In Germany, the UK and in Belgium, incentives to carry out collective action account for a large part of actions undertaken. Furthermore, this type of action is virtually non-existent in southern countries: this is quite logical as this type of action is seldom tackled by trade organisations, very active in southern countries, who normally refer actions directly to their affiliates.

Actions aimed at revitalising trade are greatly significant in Italy, Portugal and in the Netherlands, and carry important weight in France and Spain.

Funding actions account for 9 % of actions undertaken in the United Kingdom.

	Audits, counselling and support for companies	Improving the image of the zone	Revitalising of trade	Incentives for collective action	Funding	Consumer services
	(%)	(%)	(%)	(%)	(%)	(%)
South group	**19.0**	**45.2**	**26.2**	**2.4**	**7.1**	**0.0**
Spain	17.9	48 7	28.2	0.0	5.1	0.0
Greece	33.3	0.0	0.0	33.3	33.3	0.0
Italy	0.0	57.1	42.9	0.0	0.0	0.0
Portugal	0.0	50.0	50.0	0.0	0.0	0.0
North group	**16.8**	**37.9**	**28.4**	**9.5**	**3.2**	**4.2**
Belgium	16.7	41.7	12.5	25.0	0.0	4.2
France	19.0	36.2	29.3	5.2	5.2	5.2
Netherlands	7.7	38.5	53.8	0.0	0.0	0.0
Centre group	**21.4**	**32.1**	**10.7**	**32.1**	**0.0**	**3.6**
Germany	23.1	26.9	11.5	34.6	0.0	3.8
Austria	0.0	100.0	0.0	0.0	0.0	0.0
UK and Ireland	**9.1**	**45.5**	**15.9**	**20.5**	**9.1**	**0.0**
United Kingdom	9.1	45.5	15.9	20.5	9.1	0.0
Ireland						
Scandinavia	**33.3**	**33.3**	**33.3**	**0.0**	**0.0**	**0.0**
Sweden	33.3	33.3	33.3	0.0	0.0	0.0
Finland	33.3	33.3	33.3	0.0	0.0	0.0

II.4. Objectives of actions

Action objectives primarily concern revitalising trade and enhancing the value of the zone (75.8 %). Revitalising deals with maintaining or developing business activities in the underprivileged urban zone, whereas value enhancing rather focuses on image, reputation and the atmosphere of the area.

As for the remaining objectives, nearly 10 % are aimed at helping shopkeepers develop their activity (setting up information services, training sessions, surveys, development aid and contacts between shopkeepers) and 7.8 % of actions pertain to maintaining or creating new jobs in the zone (lowering the unemployment rate, increasing employability, creating new jobs in the zone). Lastly, a few actions share a common goal, incentives for collective action (rallying residents, shopkeepers or entrepreneurs around a common project or to help a group in difficulty) or fund seeking.

There are two purposes to these actions:

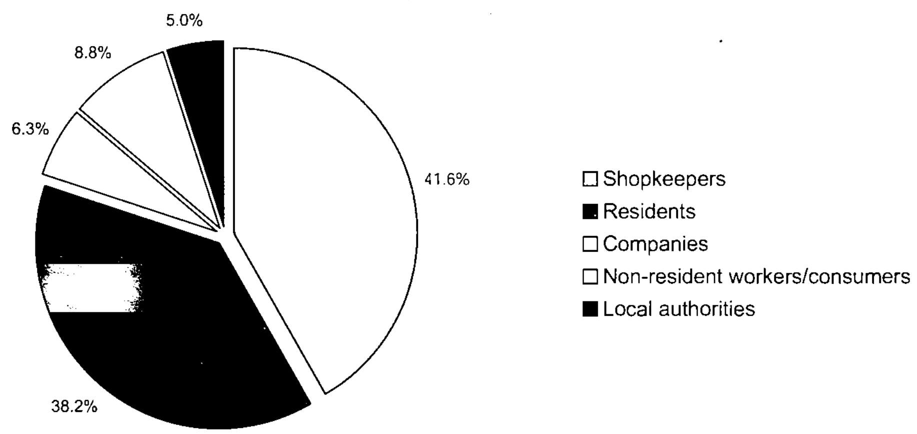
1. Reinforcing trade regardless of its environment through actions aimed at generating short-term, rapidly observable results, without setting any long-term objectives.
2. Reinforcing areas in all aspects and in all activities through short-term actions as well as mid- and long-term strategy. This approach calls for the implementation of local partnerships between the private and the public sector.

The table below summarises this information.

Objective of action	%
Revitalising zone	40.8
Improving image	35.0
Development aid	9.7
Supporting jobs/creating new ones	7.8
Incentives for collective action	4.9
Seeking funds	1.9

II.5. Beneficiaries of action

The graph below indicates that actions mainly benefit shopkeepers and residents. This is a logical result in view of the objectives outlined above: revitalising trade essentially concerns shopkeepers while improving the quality of life within a zone directly benefits residents. Of course, beneficiaries of actions are not limited to these two categories: others include companies in the zone, non-resident workers and/or consumers as well as local authorities. An action aimed at giving the town centre a facelift not only benefits residents, who see an improvement of their living area, but also local authorities as well as shopkeepers who profit from a return of consumers.



In addition, whatever the objective of the action, the main beneficiaries are still shopkeepers and residents of the zone, as can be seen from the table below: the combined ratios for the first two columns, which concern shopkeepers and residents, have the highest values for each type of action.

Action /beneficiaries	*Shopkeepers* (%)	*Residents* (%)	*Companies* (%)	*Non-residents* (%)	*Local authorities* (%)
Supporting and creating new convenience jobs	44.4	44.4	3.7	0.0	7.5
Improving the image of the zone	37.1	40.2	10.3	9.3	3.1
Incentive for collective action	62.5	25.0	0.0	12.5	0.0
Development aid/information	43.8	25.0	6.3	12.5	12.5
Revitalising zone	37.6	39.5	8.3	11.0	3.7
Seeking subsidies	50.0	50.0	0.0	0.0	0.0

II.6. Background in which action was initiated

The will to initiate an action for a zone always takes place in a particular background. In this survey it was possible to determine two main starting points for action initiation:
— a specific request submitted by shopkeepers, local or regional administrations;
— action integrated in an overall zone management programme.

Background	*%*
Requested by shopkeepers, administrations	34.1
Overall programme to revitalise zone	65.9

The above table shows how actions are mainly initiated in the two different contexts:

1. In 34.1 % of cases, following a request from shopkeepers or from their trade organisations (e.g. association of shopkeepers in Italy, Italian Confederation of Trade, Tourism and Services, Union des Classes Moyennes in Belgium), or from local or regional administrations;
2. In 65.9 % of cases, following an overall management plan for the zone where trade is one of the aspects to be dealt with (the Walloon plan for town centre management, urban structural financing plan, urban restructuring programme). Generally speaking, this initiative stems from evidence showing the overall and gradual deterioration of trade in the area, caused for example by competition from shopping malls in the outskirts (continual decline of shopping in the zone over the past 15 to 20 years, support programme for small shopkeepers faced with department store competition, etc.) or by the neighbourhood's bad reputation, unemployment problems and the decline of purchasing power in zones.

II.7. Role of organisations regarding actions

Approximately 65 % of organisations have initiated action and/or coordinated action progress. Organisations have a number of roles to play such as dealing with the financial viability of the action, seeking potential investors and organising consultations between the different players involved in the action.

One in four organisations informs and counsels communities involved in the action on such aspects as the investigation of requests, presentation within committees, drafting and following up agreements, checking and circulating information, counselling and assessment. Lastly, nearly 10 % of organisations offer either funds or logistic support to the action plan. We can therefore see that organisations polled mostly play an active role.

Role of organisations regarding actions	*%*
Action implementation/coordination	37.45
Project initiation	28.05
Counselling/information	25.05
Financial partner	7.00
Administrative/logistic support	2.45

II.8. Partners of action

In most cases, the action plan involves several partners. In many cases (52.4 %) partners are town councils and regional organisations. Shopkeepers and residents are involved in nearly 30 % of actions. In fact, partnerships are essential to ensure successful actions; they are very difficult to set up and maintain for long periods of time. Many shopkeepers and owners who are enthusiastic in the beginning quit the project while it is still under way because it is too expensive, inadequately focused on their own interests or too lengthy. These responses, likely to thwart actions undertaken, are proof enough that actions should be coordinated with the help of neutral organisations and that from the very beginning, other private players should be associated, who might prove less enthusiastic at the outset but will turn out to be more stable in time. Examples include bankers, real estate agents, parking managers, supermarkets, organisers of cultural events, public transportation companies, riparian associations, etc.

Partners	%
Town councils, local organisations	52.45
Residents, owners, local associations	16.90
Shopkeepers in the zone	12.35
Private partners	9.00
Chambers of commerce/industrial and guild chambers	8.30
Patrons of art/sponsors	1.00

II.9. Funding actions

More than 6 in 10 actions are funded by the public sector only. Some 30 % are jointly financed (private-public) and a mere 8 % are financed through private funds exclusively.

Funding	%
Public	62.8
Joint	29.2
Private	8.0

In most cases, public funding comes from European monies through Community programmes ERDF, Interreg and URBAN. No general rules can be set in terms of action funding: funding is basically generated through opportunities and contact networks specific to project initiators.

II.10. Results of action

Expected results were differentiated from results obtained as most actions were still under way at the time the survey was being conducted.

a. Expected results

Two organisations in three expected their action to rekindle trade and employment in the zone and to improve the image of the zone.

Expected results	%
Rekindling trade and employment	37.15
Increasing attractiveness of zone	30.25
Raising awareness regarding trade problems	10.90
Improving standard of living in zone	6.80
Other	14.90

The survey highlights four major types of expected results, with a predominance for the first two:

1. To rekindle business activities and employment in the zone, for example through programmes aimed at maintaining or boosting business activities, modernising and expanding shopping areas, extending opening hours of businesses and increasing the number of services offered to neighbourhood residents (37.15 %).

2. Increasing the attractiveness of the zone by trying to increase social interaction in the zone, ensuring greater security for visitors, improving pedestrian facilities, improving the neighbourhood, providing street lighting and decorating displays of empty shops (30.25 %).

3. Making politicians aware of trade-related problems in the zone with a view to securing new legislative tools useful to shopkeepers (10.9 %).

4. Improving the standard of living in the zone, for example by lowering the unemployment rate, improving schooling and ensuring an adequate balance of supply and demand of consumer goods (6.8 %).

b. Results obtained

So far, few assessments have been carried out: actions are still under way or have just been completed. Only 25.2 % of all the positive answers received mentioned results. The most frequent outcomes were new partnerships (61.6 % of responses), increased attractiveness of the urban zone (increased number of consumers) (16 %) and securing subsidies (12 %).

II.11. Has the action served as a model for other organisations?

According to organisations, nearly 60 % of actions have served/serve as a model for other urban problem areas within the country, region or city. In a few instances, the action served as a case study for higher education, schools and universities.

Example	*%*
No	34.30
Yes, at national/international level	35.70
Yes, at regional level	15.70
Yes, in the same city/commune	7.20
Other	7.10

The fact that nearly two in three actions can serve as models for other organisations at regional or national level indicates the likelihood of strong interactivity of actions in terms of urban trade. And so a positive action has a snowball effect on dynamic organisations within a region or even a country.

II.12. Can the action be transferred to other zones?

Nearly 90 % of organisations believe their action can be transferred to other zones, for example in terms of methodology or with regard to the entire experience. Apart from statistical information, the action identification cards further indicate that field organisations are willing to disseminate knowledge, share experiences, and sponsor new projects.

II.13. Creating new jobs through trade

The concept of town centre management as it was developed in the United Kingdom, Sweden and Belgium is probably a solution to the issue of vitality and viability of town centres. The idea is to set up a structure (non-profit-making) co-financed by the various town centre players in order to have an effect on the centre. The objective of this approach is to professionalise town centre management.

Managing town centres creates economic value in the zone and generates jobs through the emergence of new professions (town centre managers, urban stewards, etc.) and the development of activities specific to a market economy (renovating buildings, protecting the environment, improving parking lots, conducting marketing surveys, etc.) as well as activities specific to a social economy (support for senior citizens, support for people with disabilities, etc.).

It is important to note that the concept of town centre management as well as training for town centre managers and their stewards was initiated and supported in the Walloon Region of Belgium by the Ministry of Labour following a one-year pilot experience in one city. In the Walloon and Brussels regions, 32 town centre management offices were formed, each leading to the creation of an average of 10 new jobs and to new or reinforced trade-related jobs in town centres (between 10 and 15 jobs over a period of three years).

Six linchpins have been identified in order to initiate, and ensure the success of, town centre management:

1. strong political commitment for town centres;
2. genuine motivation of partners and a commitment in writing for projects;
3. converging views and common interests identified;
4. overall approach in order to take into account the various functions of a town centre: commercial, social, cultural, residential, town planning, environmental, etc;
5. a business plan (determining short-term objectives, and especially mid- and long-term objectives in order to ensure the continuation of approach):
   — an action plan that arouses interest,
   — a development plan that rallies and gives a sense of responsibility,
   — a strategy plan that ensures the continuation of the approach;
6. setting-up of a neutral and joint structure co-financed by private and public sectors.

III. Major subjects of interest of organisations concerned

III.1. Means of fighting against trade deterioration

— How to tackle the decline of traditional trade?
— How to guarantee the quality of staple consumer goods in underprivileged zones?
— How to ensure strict control of illegal trade?
— How to deal with competition problems of department stores located in the outskirts?
— Why invest in trade, especially in deteriorated neighbourhoods?
— What are the effects of new technologies on trade in underprivileged zones (electronic commerce, the World Wide Web as a potential customer, teleshopping)?
— How to emphasise the role of town centre managers?
— Managing open shopping malls.
— What is the role of neighbourhood stores in downtown areas with popular tourist attractions?

III.2. Means of fighting against social deterioration

— How to maintain employment in zones?
— How to improve the quality of life?
— How to solve problems pertaining to crime and violence in zones?
— Should we adjust opening hours of businesses to social life?
— What solutions exist to eradicate discrimination and xenophobic problems?
— Accommodation and development of new activities for young people in underprivileged zones.
— Meaning and importance of population structure for neighbourhood stores.
— How to fight against demographic decline in historical districts and neighbourhoods located close to railway stations?

III.3. Exchange of experiences

— Anticipating methodological indications to analyse and diagnose the commercial situation.
— Seeking to set up joint projects: initiation, problems met, solutions offered.
— Practical experiences in terms of rekindling town centres, mainly in historical districts.

III.4. Information on European Commission initiatives

— URBAN projects.
— Urban policies: players, tools, funding and possible benefits.
— European programmes to support retail trade.
— Continuation of European initiatives in terms of trade.

European Commission

Synthesis of the results of the survey on the situation of local distributive trades in less-favoured urban areas of the European Union and certain central and eastern European countries (CEECs)

Luxembourg: Office for Official Publications of the European Communities

2000 — 30 pp. — 21 x 29.7 cm

ISBN 92-828-9040-6

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Jean De Lannoy
Avenue du Roi 202/Koningslaan 202
B-1190 Bruxelles/Brussel
Tél. (32-2) 538 43 08
Fax (32-2) 538 08 41
E-mail: jean.de.lannoy@infoboard.be
URL: http://www.jean-de-lannoy.be

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Fax (32-2) 511 01 84

DANMARK

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Tlf. (45) 43 63 23 00
Fax (45) 43 63 19 69
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URL: http://www.schultz.dk

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Fax (354) 552 55 60
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NORGE

Swets Norge AS
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SOUTH AFRICA

Eurochamber of Commerce in South Africa
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2146 Sandton
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Fax (27-11) 883 55 73
E-mail: info@eurochamber.co.za

SOUTH KOREA

The European Union Chamber of Commerce in Korea
5th Fl, The Shilla Hotel
202, Jangchung-dong 2 Ga, Chung-ku
100-392 Seoul
Tel. (82-2) 22 53-5631/4
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ISBN 92-828-9040-6

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