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THE ROLE OF BORDERS IN THE EXPANSION OF RETAIL NETWORKS IN CENTRAL EUROPEAN COUNTRIES

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Abstract: Contemporary economic transformations are characterized by a diminishing significance of national states and lower-level administrative units in determining both the directions and the scale of changes. The decreasing role of administrative borders is partly due to integration processes at the regional level, and partly – to the creation of supra-border economic structures (business networks) by enterprises. Retail trade networks can be regarded as an example of such structures. The paper tackles the issue to what extent administrative units (local authorities) can affect or shape the development of this kind of economic networks. The current legislation governing such issues in Central European countries (Poland, Czech Republic and Slovakia) is compared to the regulations which are in force in Western Europe. Special emphasis is placed on tracing conflicts which arise in connection with locating new large format stores in Poland. Also, an attempt is made to identify different types of conflicts, their spatial distribution and possible ways of solving them with the participation of local authorities.

Key words: retail networks, borders, conflicts, Central Europe

1. INTRODUCTION

Progressing European integration, particularly relating to the freedom of economic activity, invites a question on the changing role of political barriers in the development of enterprise. More and more frequently economic and geographical literature is focussing on the diminishing scope of the autonomy of national authorities in determining the course of economic processes in a given territory (e.g. Ohmae, 2001: 33). Ohmae emphasized that one of the dimensions of contemporary economy is its supra-national character; a situation when the national state is losing in importance and the entire world becomes a market. What he stressed in particular was the rapid expansion of business networks created by multinational corporations. It should be pointed out that the role of territorial units in such a "networked" understanding of economic structures is not reduced to a minimum – such units (the state, the city or the commune) participate in them and contribute to them (cf. Stryjakiewicz, 2000: 40), but they are no longer dominant actors. In the context of Central and Eastern Europe, the emergence of new structures is particularly well visible in the development of retail networks organized by Western European operators, especially in the sphere of modern distribution channels, that is networks of hypermarkets, supermarkets and discount stores (collectively, large format stores, LFS).

In view of the above, the paper sets out to answer the following questions:

1. What are the similarities between the Polish, Czech and Slovak markets as regards investments in the development of retail networks, when we take into account their pace, scale and spatial distribution?
2. What are the similarities between Central and Western European countries as regards regulations concerning the location and operation of LFS?
3. What conflicts can arise in the local market when new LFS are opened (or when the relevant investment plans are announced)?

In its most part (spatial development of retail networks) the paper refers to the area of Poland, Slovakia and the Czech Republic. Most examples concerning the current development level of retail networks and conflicts which can be observed in the local markets are derived from the Polish market. Specialist press (*Handel, Supermarket News, Detal Dzisiaj*) from the years 2000 – 2004 and local editions of national newspapers (*Gazeta Wyborcza*) provided the main sources of information for generalizations concerning the scale, types and impact of conflicts arising in connection with location initiatives for new retail outlets.

2. THE DEVELOPMENT OF RETAIL NETWORKS IN POLAND, CZECH REPUBLIC AND SLOVAKIA – MAIN TRENDS

The development of retail networks is now a widespread phenomenon, not only in countries which have long traditions in this respect, but also in Central and Eastern Europe. Currently, most enterprises which are the key players in the retail trade structure in Poland, Czech Republic or Slovakia originate from 'old' EU member states. Their growing presence in the region is manifested by an expansion of retail facilities (by opening new outlets or by mergers/takeovers of other chains). The examples of such integration and concentration notably include forms of distribution based on large, modern facilities (hypermarkets, supermarkets, discount stores), which make up modern distribution channels (Wilk, 2004).

For many reasons, Central European countries represent the target area which attracts more and more foreign direct investments (FDIs). The size and character of the market, proximity or even neighbourhood of the investors' home markets, participation in the same regional integration bodies (economic, political or military) are important reasons for that. As a result, throughout the previous decade and in the last few years Poland, Slovakia and the Czech Republic have attracted inward capital, mainly from Western Europe.

In terms of investments in the trade sector, one can observe differences between the surveyed countries. In Poland, by the end of 2000, foreign companies invested over USD 7.6 billion in the trade sector alone, which accounted for more than 17 per cent of all inward investments. The bulk of these investments financed the construction of greenfield facilities or takeovers of the existing trade networks. In Slovakia, this share was 11.3 per cent by 2001. Only the Czech Republic, where investments in the production sector were relatively on a larger scale, the share of the trade sector in FDIs was lower, and fell from over 15 per cent in 1997 – 2000 to 5 per cent currently.

As regards the origin of companies investing in the surveyed markets, only minor differences can be observed, especially between the Polish market and those of Slovakia and the Czech Republic. In Poland, French capital is particularly active in the development of retail networks (Carrefour, Casino, Leclerc, ITM), while in the Czech Republic and Slovakia German players have much better developed networks (e.g. Rewe, Tengelmann), as well as Austrian (e.g. Julius Meinl) or Belgian (Delhaize Le Lion) retailers. At the moment, Dutch (Royal Ahold) and German companies (Schwarz Group) seem to be the most active players in all the three markets.

Over the several years that passed since they started their investments, Western European companies captured a significant market share in the retail trade sector in Poland, the Czech Republic and Slovakia. There are marked similarities in the rankings of the largest enterprises which participate in the trade sector in all the three countries (Table 1). As many as five enterprises are owned by ten largest players in each of the three countries. Among them, there are companies characterized by a high degree of internationalization in their operations (Ahold, Carrefour or Tesco) and German companies, extremely active in European markets (Metro, Rewe). Other similarities in investment patterns can be observed when we look at the trend to expand operations from the largest cities (usually country capitals) to smaller centres in the settlement system hierarchy.

Table 1 Largest retail operators in Poland, Czech Republic and Slovakia (by turnover volume, 2004)

Ranking	Poland	Czech Republik	Slovakia
1	Metro	Makro	Tesco
2	Jeronimo Martins	Kaufland (Schwarz Group)	Metro
3	Tesco	Ahold	Billa (Rewe)
4	Auchan	Rewe	Kaufland
5	Ruch	Tesco	Ahold
6	Carrefour	Globus	Carrefour
7	Geant	Tengelmann	M-Market
8	Rewe	Carrefour	Labas
9	Ahold	Spar	Prima Zdroj Holding
10	Tengelmann	Delvita	COOP Jednota SD Bratislava

Note: companies which are among the key players in each of those markets are marked in grey.

Sources: Lebensmittel Zeitung (after: Handel 3/2005), Handel 11/2005, Moderni Obchod, Terno, Lebensmittel Zeitung (after: Handel 4/2005).

Regardless of the market, the presence of foreign investors in the retail trade sector in each country began with the construction of a chain of LFS, mainly hypermarkets and supermarkets. Discount stores first started to appear in the mid-1990s. Especially the recent years saw a boom in the development of large format storès in the researched countries. According to AC Nielsen[1], in 2000 – 2004 alone the number of hypermarkets in Poland grew from 107 to 193, in the Czech Republic – from 77 to 162, and in Slovakia – from 19 to 75.

[1] According to Handel, No. 7/2005, p. 20.

Discount store chains are gradually increasing their market share in Poland, Czech Republic and Slovakia. Each of the countries has its own unique nature when it comes to the leaders among discount retailers. In Poland, Biedronka, owned by the Portuguese-based Jeronimo Martins is the leader with its over 700 shops, the German PennyMarket (Rewe) in the Czech Republic and the German Lidl in Slovakia. In each of those countries, Tengelmann's (Plus Discount) and the Schwarz Group (Lidl) shops can also be found. Especially the rapid development rate of the latter investor commands attention (Figure 1).

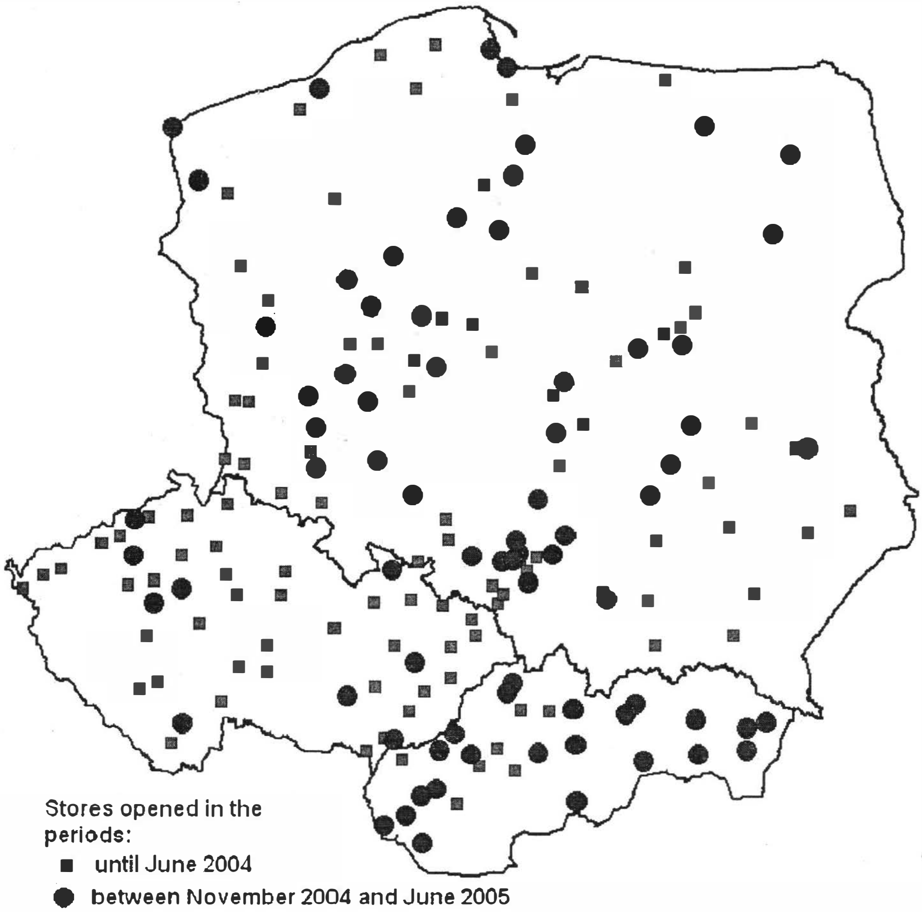

Figure 1 Development of Lidl discount networks in Poland, Czech Republic and Slovakia (until June 2005) [stores opened in the periods: until June 2004, between November 2004 and June 2005]. Source: prepared by the author

As a result, at the moment the Central European markets can be regarded as ones with the highest degree of international penetration. According to Coe (2004: 1575), in 2002, the three countries covered by the research were ranked among 20 most internationalized retail trade markets[2]. Poland was ranked second (after France), the

[2] Based on the analyses of www.planetretail.net, ranking 30 largest international food retail enterprises operating in local markets.

Czech Republic was 12th, and Slovakia – 20th. In each of these countries, 13, 10 and 7 respectively of 30 largest retail companies conducted their operations.

Such a fast pace of network expansion as in the case of discount stores must inevitably lead to different conflicts on economic, social or ecological grounds. Usually, the reasons are of a mixed nature. This raises the issue whether it is possible either to resolve arising conflicts or avoid new ones in the future, which should be done on the basis of legal regulations governing the functioning of this sphere, introduced in each of those countries.

3. REGULATIONS CONCERNING RETAIL TRADE IN WESTERN EUROPE AND CENTRAL EUROPEAN COUNTRIES

Despite the differences between the 'landscape' of the retail trade in individual European countries, the sector's development depends on several universal factors. COLLA (2004: 48) lists four groups of mutually interrelated factors affecting the development of the retail trade sector in a given country (Figure 2). In addition to internalization of trade and appearance of new players on the market, technological development and customers buying habits, legal regulations pertaining to the retail trade sector are still playing a significant role.

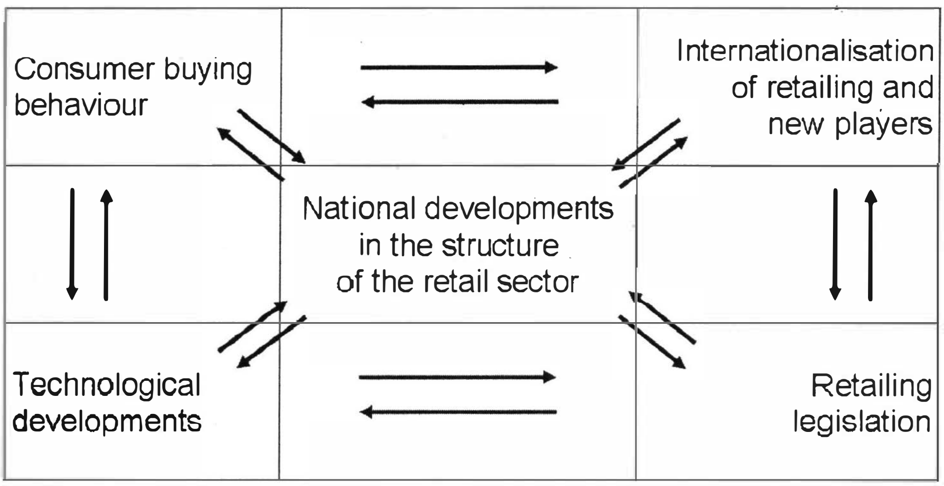

Figure 2 Factors of change in the retail sector. Source: Colla (2004: 48).

There are many circumstances that the authorities take into account in their interventions in the retail trade sector. According to Guy (1998: 964), they mainly include: increasing the efficiency of market operations, controlling the negative effects, ensuring protection or assistance on social grounds. For each of these motives (and markets), other examples of specific activities might be quoted; many of them have had serious consequences, including spatial ones.

Regulation procedures concerning retail trade can be encountered at various levels of the administration hierarchy – the central, regional and local (cities and communes). Geographical studies concerning these regulations which have been conducted so far focus in the national (central) and the local level (Wrigley, Lowe, 2002: 113). According to these authors, these regulations as a rule govern such issues as the working hours of the retail facilities, competition between retail trade enterprises and their suppliers (producers), and competition between the enterprises themselves. Looking at the current situation concerning retail trade development in Central Europe, regulations related to spatial planning and environmental protection could also be added.

Some of the above regulations are introduced by the central authorities, some rest with the local authorities, and in some cases they belong to the competencies of various administration levels. The fundamental regulations governing the competition between enterprises still rest with the central authorities. They include basic laws concerning freedom of economic activity, constraints on the dominant market position, or the power position in retailer-supplier relations. The same applies to labour market regulations (working hours, work on statutory holidays, work of women).

On the other hand, the regulations which are introduced at the local level (commune, district) as a rule pertain to spatial planning or anticipated impacts of the planned investment on the natural environment. When we compare the situation in the Western European countries (according to Howe, 2003) with the situation we can currently see in Poland, Czech Republic or Slovakia, two conclusions seem inevitable. Firstly, there is no universal model of regulations related to the location and operation of retail trade in Western European countries. In each of those countries, there is (or has been) a more or less stringent legal framework, allowing to regulate the number and size of new retail trade facilities, the decision making procedure concerning new investments or opening hours of the facilities. In most cases, the current set of regulations has evolved in response to the long term (usually spanning 20 to 30 years) development tendencies in trade.

Secondly, the regulatory frameworks in the Central European countries do not markedly differ from similar regulations in the west of Europe. For example, as regards such issues as the size of the planned retail facility whose location requires wide social consultations) the regulations in Poland are similar to those which are currently in force in Spain, Denmark or Portugal (Kłosiewicz-Górecka, Słomińska, 2001: 53). At the same time, the statutory size thresholds for new facilities for which the issue of a planning permission requires that a number of additional conditions should be fulfilled is considerably lower in France, Austria or Italy (300 – 400 m^2 of trading area). In the years 2001 – 2003 in Poland, this threshold was set at the level of 1,000 m^2 for communes with a population up to 20,000 (and 2,000 m^2 in larger communes). In the case of the Czech Republic and Slovakia, this threshold is even higher (3,000 m^2) but only entails the requirement to prepare environmental impact analyses.

The regulations imposed by the Polish Spatial Development Act of 2001 obliged the communes, before issuing a relevant planning permission, to analyse the consequences of locating a new megastore in terms of:
- the local labour market;
- the transport system;
- the existing retail network (competition);
- fulfilling the needs of the local community (consumers).

In addition to the above, also the local governments in the neighbouring communes and at the district level had the right to express their opinion on this matter. In merely two years this law was amended, and the new version does not stipulate the need to analyse the above-mentioned consequences of the location of new retail facilities. Currently, the only requirement imposed by the legislation on the local authorities is to determine, in the guidelines for the local spatial development plan, the zoning for retail facilities with a trading area in excess of 2,000 m^2.

As regards the regulations concerning the opening hours of retail outlets, the situation in Poland, the Czech Republic and Slovakia differs from the one in such countries as Germany, for example. Despite attempts made at the central level (Czech Republic) or at the local level, in individual communes (Poland), there are no restrictions on the opening hours of large format stores throughout the region.

One of the reasons for such frequent changes in the existing regulations (for example in Poland) is an attempt to adapt the legal framework to the pace of changes in the retail trade sector. In Western European countries it took much longer to achieve the current level of market penetration by modern distribution channels than in Central European countries. Such circumstances were conducive to taking informed decisions which took into account the interests of (nearly) all the stakeholders involved. A dynamic entry of huge retail trade operators onto the Polish, Czech and Slovak markets, and their rapid securing of a dominant position on these markets, has inevitably led to many conflicts in the local communities. These conflicts, however, arise from a larger number of factors than merely the pace of 'invasion' of huge companies with foreign shareholdings. In this context, some point to the weaknesses in Polish legal regulations, which do not sufficiently address several of the aspects involved (Pszczyński 2004: 531). They include wide social consultations before taking any zoning decisions for location of retail function (LSF) that could affect the local market and its development, as well as cooperation of the neighbouring communes in determining the locations for such retail outlets, and costs which need to be incurred by the local (commune) government in connection with the construction of new supermarkets or hypermarkets.

4. LOCAL CONFLICTS ACCOMPANYING THE LOCATION OF NEW LARGE FORMAT STORES

Analysis of texts published in the press about local conflicts which arise in connection with the location of new supermarkets or hypermarkets in Poland allows for certain generalizations concerning the parties involved in such conflicts, their reasons and efforts undertaken with a view to resolving them.

As regards the geographical distribution of such conflicts, it is difficult to indicate areas of their strongest concentration. At the end of 2004, hypermarkets operated in nearly 100 (94 to be exact) Polish cities. By that time, conflicts related to the location of these outlets took place in more than 50 cities, in almost all the regions. However, conflicts in every city with a hypermarket were observed only along the eastern border of Poland. As regards supermarkets and discount stores, they can be found in many more locations, and conflicts related to the planned opening of new outlets of this kind are much more common, regardless of the region of the country.

The usual parties involved in such conflicts include the local government in a commune with a prospective outlet location; investors (most frequently operators of a given retail network); local traders' community (the so-called independent trade) and ecological organizations (Figure 3). In many cases, the authorities of the communes which were against locating a large scale store in the neighbouring commune were also involved in such conflicts. Most reservations and objections were always voiced vis à vis the authorities of the commune in which the new outlet was located, which had to choose between the arguments expressed by the investors, local traders and ecologists (mainly in larger cities).

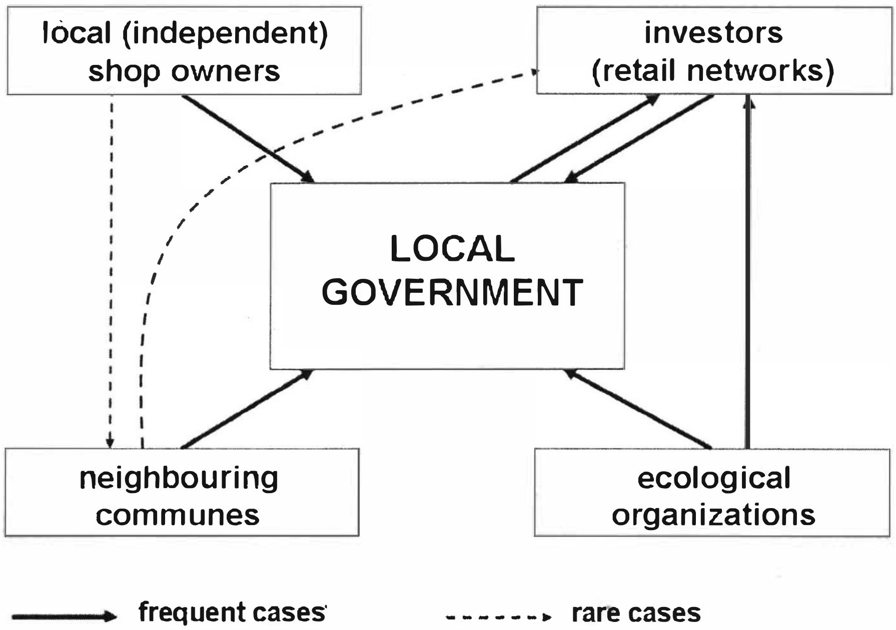

Figure 3 Parties involved in conflicts related to LSF location in a commune. Source: prepared by the author

The most common reasons for conflicts and disputes were related to different expectations of the institutions voicing complaints. Companies which were seeking permission to build new outlets blamed the local authorities for tardiness in taking administrative decisions, in some cases for changing the earlier arrangements or promises without any references to the legal grounds for such a change. Conflicts were frequently caused by different visions concerning the planned site of the outlet, in cases when the investors were interested in areas situated in the city centre or its vicinity while the local authorities would approve the investment provided it was located on the city's outskirts. Another bone of contention was the planned size of the new outlet (the local authorities were usually in favour of smaller facilities). In some cases, the local authorities would follow the suggestions of the local traders' community and repeal their earlier decisions, leading to protests of the investors and their appeals to higher-level authorities (the voivod – provincial governor), who as a rule would annul such changes as unlawful.

The complaints voiced by the local traders' community against the local authorities were as a rule caused by their concern about increased competition on the local market after the entry of a new, powerful retail operator. Protests were sometimes so strong that they resulted in blockades in the construction sites. Representatives of the local independent retail trade found it difficult to convince the local authorities and the local community, hoping for a more varied trade offer and lower prices, to their line of argumentation. There were cases however when the local authorities were able to reach a consensus with the owners of small shops; in some places (like Olsztyn) the latter have been invited to give their opinion about the planned retail projects. The concerns of independent traders, mainly their fear of increased competition, are not groundless. New outlets also bring new, more effective ways of retail trade operations. The reactions of the local traders' communities are usually defensive. In many cases, they organize so as to ensure a better representation of their interests only when the huge players – operators of retail networks – appear on the local market. It is very seldom when small entrepreneurs can afford to oppose a large retail network; it has also to be admitted that they seldom think in advance about the consequences of increased competition.[3]

The complaints voiced by ecologists and frequently publicized by the media arise on the grounds that new large format stores take up areas situated on the city outskirts and having marked natural values. On other occasions (as in Warsaw), the ground for protests is the need to maintain desirable proportions between urban development and elements of natural landscape, which are indispensable for the proper functioning of the entire city (e.g. aeration belts, water relations, etc.). Sometimes this situation leads to 'eco-terrorism', when ecological organizations block the construction of new facilities on the grounds of alleged loopholes in administrative decisions in order to raise money for their statutory activity.

The impact of new hypermarkets (or supermarkets in smaller cities) in many cases reaches beyond the boundaries of the commune (or city limits). For this reasons, many complaints are voiced by the communes neighbouring with the commune where the new outlet is located. It is difficult for them to pursue an economic policy (support to the local independent trade) when some of the existing demand is satisfied outside the commune. Small independent traders from the neighbouring communes join in those protests because the administrators of the new outlets launch free bus connections serving the outlet customers with a view to expanding the area of the outlet's impact. In many cases the bus routes run beyond the boundaries of the commune in which a given outlet is located.

New retail facilities considerably change the road traffic in the vicinity of the outlet, especially the traffic volume and direction of the main traffic streams. This is another reason for protests voiced by those who live in the direct vicinity of such facilities (noise, air pollution, etc.) and for demands expressed by local authorities to participate in the costs of the modernization of the road network near the facility.

Despite the numerous and in some cases strong protests, efforts are undertaken to resolve or at least alleviate the consequences of the opening of new large format stores.

[3] In 2002, as many as 40 per cent of independent traders in Białystok, asked by Uniconsult about their reaction to the hypermarket opening in their vicinity, admitted they had not yet thought about it; two fifths said they would close down their shop. Only one in five of the respondents intended to cut down costs and face the competition. [Supermarket News, 2002].

On the investors' side, it usually has a triple form: participation in the redevelopment of the road network, contributions to the funds aimed to support the local enterprise, and financial 'compensations' for the ecologists.

In view of the anticipated impact of new outlets on their surroundings, participation in the costs of redevelopment, modernization or construction of the road connections is included in the calculation of the total costs of the investment. Investors from the retail sector resolve to complete the project on their own account or transfer relevant funds (grants) for this purpose to the commune authorities. To appease, even partly, the protests of the local traders community, large retail networks support local loan guarantee funds, which facilitate access to capital to small businesses which have a weak position in negotiations with the banking sector. Investors, of their own accord and in consultation with the city authorities, provide funds for the loan guarantee funds. There about 20 such institutions operating across Poland, with funds made up of capital made available by huge retail networks. Funding can also tone down the protests of ecologists; this is the reason why agreements between investors and ecological organizations are more and more common.

5. CONCLUSIONS

In all places where economic development processes are taking place, conflicts will arise between different actors and stakeholders involved. Investments of Western European retailers in Central European countries can be seen as an example of a process which leads to many protests among the local communities. One of the reasons for such conflicts is the rather long time of reaction of the authorities to the need to institute changes in the legislation concerning such investments. In many cases, in all the three countries – Poland, Czech Republic and Slovakia, these regulations do not diverge widely from the current standards observable in the Western European countries. Many conflicts arise in connection with the pace of the new investment projects, creation of new distribution channels in trade and failure of the legislative processes to keep up with those changes.

In preparing new regulations and decisions at the local level, it is particularly necessary to introduce wider social consultations. Decision makers (local authorities) must bear in mind that many different types of businesses, often with conflicting interests, operate within and around the retail trade sector. Nowadays, it is also difficult to confine business activity to the boundaries of administrative units, especially as small as the communes. The problem that local authorities usually face is their weak bargaining position in negotiations with huge retail trade operators. The power of the latter (measured for example by their annual revenues) in many cases far exceeds the aggregate GDP generated not only in the commune or district, but in the entire region.

All in all, it can be said that the extent to which local authorities can influence the development of the retail sector also depends on our behaviours as consumers. If a concentration trend continues in Central European countries and the share of huge operators in the market continues to grow, they will certainly use it in their negotiations with the local governments. It can be said therefore that not only legal regulations but also shopping behaviours will shape the face of the retail trade in our region.

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Rola granic w ekspansji sieci handlowych w krajach Europy Środkowej

Resume

Postępujący proces integracji europejskiej, szczególnie w zakresie swobody podejmowania działalności gospodarczej, nasuwa pytanie o zmieniającą się rolę granic politycznych w rozwoju przedsiębiorczości. Coraz częściej w literaturze ekonomicznej i geograficznej pisze się o zmniejszaniu się zakresu suwerenności władz państwowych w decydowaniu o przebiegu procesu rozwoju gospodarczego na danym terytorium. Szczególnie podkreślany jest ekspansywny rozwój sieci gospodarczych kierowanych przez ponadnarodowe korporacje. W odniesieniu do krajów Europy Środkowej i Wschodniej jest to widoczne na przykładzie rozwoju sieci handlowych organizowanych przez operatorów zachodnioeuropejskich.

W związku z tym w tym tekście autor podejmuje się odpowiedzi na kilka pytań:

- na ile podobne są rynki Polski, Czech i Słowacji w odniesieniu do inwestycji w rozwój sieci handlowych, uwzględniając tempo, skalę i układ przestrzenny obserwowanych inwestycji;
- jakie są podobieństwa pomiędzy krajami Europy środkowej i zachodniej w zakresie regulacji prawnych dotyczących lokalizacji i działania wielkopowierzchniowych obiektów handlowych (hiper-, supermarketów, sklepów dyskontowych);
- jakiego rodzaju konflikty powstają na rynku lokalnym w przypadku pojawienia się nowych wielkopowierzchniowych obiektów handlowych (lub tylko zamiaru inwestycji).

Zasadnicza część opracowania (rozwój przestrzenny sieci handlowych) obejmuje obszar Polski, Czech i Słowacji. W analizie aktualnego poziomu rozwoju sieci handlowych i obserwowanych konfliktów na rynku lokalnym autor skoncentrował się na przykładach z rynku polskiego. Główne źródło informacji, na których podstawie dokonano uogólnienia skali, rodzajów i siły oddziaływania konfliktów rodzących się wraz z inicjatywami lokalizacji nowych placówek handlowych, stanowiła analiza prasy fachowej, handlowej (*Handel, Supermarket News, Detal Dzisiaj*) z lat 2000 – 2004 oraz lokalnych wydań prasy codziennej (*Gazeta Wyborcza*).