

TCM

Frame conditions

more info contact:

Arch. Giovanna Codato

Vice President Gecc-Lab

gcodato@gecc-lab.eu

- **demographically-spatial structure**

partner country	inhabitants	population development 2030	number of cities (own town law)
Austria	8,4 Mio	8,0 %	<p>cities above 1 Mio inhabitants 01 (Vienna/1,7 Mio)</p> <p>cities more than 100.000 inhabitants 04 (Graz/252.000; Linz/190.000; Salzburg/149.000; Innsbruck/119.000)</p> <p>cities betw. 50.000 to 100.000 inhabitants 04 cities betw. 20.000 to 50.000 inhabitants 16 cities betw. 10.000 to 20.000 inhabitants 94 "market towns" under 10.000 inhabitants 70</p> <p>and more than 2.100 other smaller villages (with own local authorities)</p>
Belgium	10,8 Mio *	10,8 % **	<p>cities above 1 Mio inhabitants 01 (Brussels/1;09 Mio)</p> <p>cities more than 100.000 inhabitants 06 (Antwerpen, Charleroi, Luik, Gent, Brugge & Namen,)</p> <p>cities betw. 50.000 to 100.000 inhabitants 15 cities betw. 20.000 to 50.000 inhabitants 45 cities betw. 10.000 to 20.000 inhabitants 43 "market towns" under 10.000 inhabitants 23</p> <p>and 456 smaller villages (with own local authorities)</p>
Italy	60.4 million	3,20%	<p>cities above 1 Mio inhabitants 02 (Rome/2,7 Mio, Milan/1,3 Mio)</p> <p>cities more than 100.000 inhabitants 46 (Napoli/0,96 Mio, Torino/0,91 Mio, Palermo/0,65 Mio, Genova/0,61 Mio, Bologna/0,38 Mio, Firenze/0,37 Mio)</p> <p>cities betw. 50.000 to 100.000 inhabitants 65 cities betw. 20.000 to 60.000 inhabitants 412 cities betw. 10.000 to 20.000 inhabitants 701 "market towns" under 10.000 inhabitants 3.354</p> <p>and 3.251 smaller villages (with own local authorities)</p>
Spain	47 million	1,3%	<p>cities above 1 Mio inhabitants 02 (Madrid/3,2 Mio, Barcelona/1,6 Mio)</p> <p>cities betw. 500.000 to 1 Mio inhabitants 04 (Valencia/0,8 Mio, Sevilla/0,7 Mio, Zaragoza/0,67 Mio,</p>

			<p>Málaga/0,56 Mio)</p> <p>cities betw. 200.000 to 500.000 inhabitants 23</p> <p>cities betw. 100.000 to 200.000 inhabitants 33</p> <p>cities betw. 50.000 to 100.000 inhabitants 83</p> <p>cities betw. 20.000 to 50.000 inhabitants 252</p> <p>cities betw. 10.000 to 20.000 inhabitants 354</p> <p>cities and small villages under 10.000 inhabitants 7363</p>
United Kingdom	62.3 million	N/A	<p>cities with population above 1 million 02 (London – 7.2 million; Birmingham – 1.02 million)</p> <p>cities with population above 200,000 >20 (Glasgow – 629.500; Liverpool – 469,017; Leeds – 443,247; Sheffield – 439,630; Edinburgh – 430,082)</p>

legal frame conditions

partner country	state system	Urban planning Competence	Chambers of commerce system
Austria	federal republic (9 states)	<p>1st level cities and towns</p> <p>2nd level State (guidelines, final approbation of "out of the town"- shopping centers,)</p> <p>no Austrian wide common planning law and guidelines</p>	<p>obligatory system</p> <p>(each enterprise has to be member of the Austrian chamber of commerce)</p> <p>one national Chamber, 9 State Chambers and in each county also one "service unit"</p>
Belgium	Federal country with 3 regions. Provincial and urban level	<p>1st level cities and towns</p> <p>2nd level province</p> <p>3rd level Flanders</p>	<p>Non-obligatory system (voluntary membership)</p> <p>Professional and interprofessional organizations who defend the interests of PME's</p>
Italy	Unitary parliamentary republic, with 20 regions, 110 provinces, 8092 municipalities	<p>1 st level national government unitary national urban planning law and major projects (i.e. Infrastructures) and frame laws on retail</p>	<p>obligatory system</p> <p>(each enterprise has to be member of the chamber of commerce)</p>

		<p>distribution</p> <p>2nd level regional government regional urban planning laws and land use planning and retail development and regulations</p> <p>3rd level provincial governments land planning and urban planning and retail planning (accessibility and environmental impact)</p> <p>4th level municipalities urban planning</p>	<p>one national Chamber, 19 regional unions of provincial chambers and 103 provincial chambers also several (100+) "service units" for different topics, 1 national research institute and 30 foreign agencies</p>
Spain	Parliament Monarchy, with 17 regions, 52 provinces, 8115 municipalities	<p>1st level national government</p> <p>2nd level regional government</p> <p>3rd level local government</p>	<p>Non-obligatory system (voluntary membership)</p> <p>Professional organizations who defend the interests of PME's</p>

economic key figures

partner country	gross domestic product	number of enterprises	un-employment rate	average annual wage level	retail trade space	overnight stays/ year
Austria	28.300 €	294.400	4,4 %	36.373 €	14,5 Mio m ² (1,7 m ² /per.)	130 Mio (7,7 % quota to the gross domestic product)
Belgium	33.240 €	514.262	6,8 %	32.400 €	17,1 Mio m ² (1,56 m ² /p.)	60,5 Mio
Italy	\$ 2.05 trillion	6.1 million	8.3%	€ 14.700,00	96.6 Mio m ² (23,7% of GDP) 1,6 m ² /p.)	309 Mio (tourism = 12% GDP)
Spain	1.117.624 € million	3.63 million	21%	22.511 €	60 Mio m ² aprox.	98,5 Mio

United Kingdom	\$2.480 trillion	4.8 million	8.3% (plus another 8% of people on long-term benefits and out of work)	£25,543	N/A	N/A
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TCM development steps

partner country	1 st professional TCM unit	main development steps
Austria	1994 in Wels	<p>in the early 1970 foundation of local advertising associations by local retailers</p> <p>beginning of the 1990`s start of TCM planning processes</p> <p>midst – end of 1990`s foundation of professional TCM units</p> <p>2000-2005 enormous increase of professionalizing of TCMs (forming of “one stop shop organizations”)</p> <p>since 2008 upcoming quarter management projects with financial support by landlords and house owners (BID similar projects)</p>
Belgium	1998 1999 2000 - 2010	<p>The Flemish Government established the Mercury Fund to revitalize urban commercial centers. The entire procedure takes place in two phases. In a first step, municipalities had to make up a strategic business plan which sketches an analysis of the current retail environment and also their plans for the future. In preparing these plans, the municipalities were given a grant of up to 40.000 euro.</p> <p>In a second phase concrete investment projects were taken into account which should fit in the strategic business plan. The best projects would be subsidized by the Flemish government through the Mercury Fund. The fund included an amount of 25 million euro.</p> <p>Given the success of the Mercury Project the Flemish Government wanted to extend this initiative. The next call was about the development and support of center management. The budget was 5 million euro. With those means, the Flemish Government took into account a part of the cost for center management: The first operating- year, 50 percent of the costs, the second year 33 percent and third year 25 percent.</p> <p>In the next decade, many Flemish cities started the center management, not always in a PPP but usually encapsulated in the urban administration. Only in the larger cities, the center manager is a full time job. In smaller cities and towns the job of TCM is combined with other economic tasks.</p>

Italy	1998	First national framework promoting creation of Natural Shopping Centres (CCN)
	1999	Regional laws start to institute CCNs and support them with public funding; all work to tie local administrations and retailer associations by binding their cooperation through regional funding programs. Last region to operate: Campania. Over 800 CCNs established. Now evolving twds TCM units
	2009	1 st TCM professional unit in Parma, now about 5
Spain (Andalusia)	1999-2003	1 st Stage: AWARENESS AND COMMISSIONING <ul style="list-style-type: none"> - 1st European Congress of Commerce and City in Torremolinos (Málaga) - 1st National Meeting of TCM in Huelva - Creation of the TCM network in Andalusia - first registration and cataloguing of TCM in Andalusia - commercial animation and Marketing actions in TCM
	2003-2007	2 nd Stage: DEVELOPMENT <ul style="list-style-type: none"> - Creation of a common brand for the TCM network in Andalusia - Development and implementation of signage for the TCM network in Andalusia - Creation of Urban Technical Staff - Strengthening the model public-private partnership - Other improvement projects in TCM
	2007-2011	3 rd Stage: MATURITY, REVIEW AND FUTURE VIABILITY MODEL <ul style="list-style-type: none"> - The Council of Andalusia published the White Book in TCM: Condition Assessment of each TCM. Classification of TCM in Andalusia according to requirements. - Laws in Andalusia adapted to the Bolkestein Directive
	2011-next years	4 th Stage: NEXT ACTIONS National government and the Retail Business Confederation of Spain (CEC) are discussing to improve TCMs in Spain and implement the system of BIDs.
United Kingdom	Initial schemes launched in Redbridge, Reading, York and Woking during 1985 and 1986	Informal grouping of TCMs met in 1989 and formed the Association of Town Centre Management in 1991 Major roll-out of the Management concept, supported by several national retailing chains such as Boots, Marks& Spencer and Sainsburys during the mid 90s First world congress held in Coventry in 1996 Launch of research into Business Improvement Districts in 2000, piloted across the country and this eventually led to the creation of primary legislation to allow them to form in the UK. To date there are more than 120 successful BID established here, largely in towns and cities Currently around 600 towns and cities enjoy the benefits of the TCM process. Further professionalization of the industry is being particularly encouraged, with continuing professional development now available through the organisation ATCM helped to create in 2006 – the Institute of Place Management.

TCM key figures

partner country	current number of professional TCM units	legal TCM forms	annual basic budgets	financial support structures (basic budget)
Austria	90 and 507 local retailer associations	limited company 55 % association 26 % local municipality depart. 14 % joint partnership 03 % other structures 02 %	cities under 20.000 inhabitants 207.000 € cities between 20-50.000 inhabitants 345.000 € cities between 50-100.000 inhabitants 680.000 € cities over 100.000 inhabitants 980.000	local municipality 62 % local tourism fee 25 % local entrepreneur associations 10 % other sources 3 %
Belgium	No exact data	Either limited company (non-profit) or local municipality department (probably > 90 %)	48% has an annual budget of less than 25.000 € 20% has an annual budget of more than 100.000 €	Mostly local municipality funding
Italy	professional units CCN	PP consortium private consortiums or associations	Avg budget 140.000€ for cities around 70.000 pop. Avg budget less than 50.000€	60% municipalities 30% private; 50% regional; rest local admin and private sponsors, membership dues
Spain	Andalusia: 114 TCMs Spain: 600 TCMs aprox.	100 % Comercial Association	40% Between 20.000 and 50.000 € 60% More than 50.000 €	60% Public 20% Partners 20% Other: local municipality funding (Council)

TCM Manager

partner country	average age and gender	average monthly gross salary	average work experience	education level
Austria	40 years 39 % female	4.530 €	7,2 years	58 % graduate degree
Belgium	Gender 50/50 35% = + 46 years	41% has a yearly salary of < 30.000 €	3 to 5 years	70% has a bachelor or master degree
Italy	46 years 31% female		3 to 5 years	
Spain (Andalusia)	38 years 50% male 50% female	28.000 € annual salary	More than 4 years	70% has a university degree