



## **Guidelines on Inter-municipal Commercial Location Development**

### **Annex**

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### Navigation advice

Please use the „Bookmarks“ in your pdf-reader to navigate to the tool or practice examples of your choice.

You may also use the entries of “Table of content” on the pages 2 and 3 for navigation. Use the link “Table of content” on the bottom of each page to return there.

Please click the button “Attachment” in the navigation tab to find the attached Excel files.



## A Inter-municipal cooperation



## Field trip “Current Practice of Inter-municipal Management of Commercial Areas”

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### Date:

5<sup>th</sup> May 2010

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## Introduction

In the framework of the kick-off in the region Alpsee-Grünthen the representatives of the municipalities agreed on the necessity to study current practices of inter-municipal management of commercial areas in detail by means of a field trip. The field trip should particularly offer the possibility to learn from existing experiences in the field of inter-municipal cooperation on commercial development by a face-to-face knowledge exchange with responsible persons of municipalities where such cooperation is already in place. It should help to clarify, which practices could be suitable models for the development in the region Alpsee-Grünthen. Generally, the field trip should give answers to questions as:

- How is the inter-municipal cooperation organized, coordinated and regulated? How are decisions taken? Which municipal tasks are transferred to the responsibility of the inter-municipal organization, which tasks remain in the responsibility of the single municipalities (e.g. spatial planning)?
- How do the municipalities regulate financial issues, how and to which extent do they share costs and revenues?
- Which models facilitate the cooperation of municipalities of different sizes, preconditions and potentials?
- Which instruments are used for marketing?
- Which are relevant sources of demand for commercial development, how do the municipalities analyze the demand within the region and from outside the region?
- Which were the requirements and preconditions for the implementation of different models of cooperation? Which locally specific obstacles or success factors hindered or favored the development?

Additionally the field trip should also highlight the benefits and advantages of cooperation in the field of CLD, which were experienced by the “practitioners”.

The two-day field trip on the 18<sup>th</sup> and 19<sup>th</sup> February 2010 lead a group of 20 persons comprising mayors and representatives of the councils and the administrations of the municipalities, participants from the district administration as well as members of the project team to visit the following examples of Inter-municipal Management of Commercial Areas<sup>1</sup>.

### 1. Gewerbepark Unterallgäu – Inter-municipal Business Park Unterallgäue

[www.gewerbepark-unterallgaeu.de](http://www.gewerbepark-unterallgaeu.de)

Strategy: Inter-municipal Business Park focusing on supply development (development of new areas without knowledge of demand) with the aim to acquire new enterprises from outside the region with a minimum demand of land of 5 hectares

The special purpose association „Industrie- und Gewerbepark Unterallgäu“ (Industry and Business park Unterallgäu) comprises the city of Mindelheim and the municipalities Ap-

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<sup>1</sup> An extensive description of the practices can be found in the respective factsheets in the annex of this report.

feltrach, Kammlach, Stetten and Unteregg. It was founded in 2003, aiming at the development of a joint business park at the motorway A 96. The business park encompasses an area of 75 hectares (partly covered by a master plan, partly already included in the municipal land utilization plan). In a first stage, an area of 15 hectares has been developed and a first enterprise could be settled.

This example, set in comparable structural conditions as Alpsee-Grünten, served to present the organizational issues of an inter-municipal business park as well as chances and limitations of this strategy.

### Conclusions:

- The realization of the inter-municipal business park strongly depended on favorable framework conditions concerning the purchase of the land. By using an option contract, which was extended several times, the municipalities could delay the purchase of the land until an investor was at hand; so the municipalities did not have to advance the costs for the purchase and development of the land.
- The demand for commercial areas was very low for several reasons. For instance, there was competition to other business parks along the motorway A 96. But also the municipalities set different criteria for the acquisition of enterprises: The minimum area of land to be sold should be 5 hectare; the settlement of stores of large retail traders being competitors for inner-city traders was excluded acquisition. So finally the first investor could be acquired in the year 2008, while the cooperation first started already in the year 2000.
- The investor required a strong support from the municipal administration, including anything from regulatory advice to public relation. Smaller municipalities would possibly have been overstrained to provide this support in a professional way.
- The long preparation period highlights the importance of sharing development costs between the municipalities.
- The reward of the efforts of the municipalities was the acquisition of one enterprise (automobile tire recycling) providing 40 new jobs while utilizing 11 hectares of land.

## 2. Stadtentwicklungsverband Ulm/Neu-Ulm – Urban development association Ulm/Neu-Ulm

[www.stadtentwicklungsverband.ulm.de](http://www.stadtentwicklungsverband.ulm.de)

Strategy: Pool for the joint marketing of commercial areas basing on joint location marketing

The urban development association Ulm/Neu-Ulm was founded in 1999/2000 as a special purpose association of the cities of Ulm and Neu-Ulm according to the Bavarian law of municipal cooperation, which allows regulations concerning financial allocations. The sharing of costs and benefits is determined by the number of inhabitants (2/3) and the amount of area in the pool (1/3). The core tasks of the association are e.g. the assignment of real estates, business development, contacts to local and regional economy, joint location marketing. Concerning real estates, the association concentrates on marketing and on finding and providing suitable sites for the inquiring businesses. The tasks of acquisition, planning, development and sale of the land remain in the authority of the municipali-

ties involved. Additionally, the association respectively the cities of Ulm and Neu-Ulm made cooperation agreements concerning the marketing of real estate with several smaller municipalities in the region Elchingen, Nersingen, Dornstadt and Blaustein. The commercial areas which are jointly marketed currently amount to 110 hectares, including large conversion areas in the city of Neu-Ulm.

#### Conclusions:

- Due to a strong atmosphere of trust between the administrations of the two cities, the tasks of the association can be fulfilled pragmatically, although the regulations laid down in the articles of the association are rather complex.
- The cooperation helped to overcome the rivalry between the cities and to pool resources.
- The settlement of enterprises is managed by one central administrative body, integrated into the existing administrative structures. The additional tasks are administered within the framework of existing entities without additional staff.
- The focus of the cooperation is set on management of local and regional enterprises concerning the extension or relocation of existing businesses; the settlement of new businesses from outside the region is of minor importance.
- The cities of Ulm and Neu-Ulm agreed on a system of balancing costs and revenues. The balancing system is rather complex, as the cities are situated in different German federal states using different municipal tax systems. So during the first years the balancing of revenues was found to be unnecessary due to a rather even and regular distribution of revenues compared to high efforts of sharing revenues. Since 2007, the distribution of revenues has become more unbalanced, so that a discussion on the methods of sharing costs and revenues has begun recently.

The basis for this agreement is a strong atmosphere of trust between the cities.

### 3. **Regionaler Gewerbeflächenpool Neckar-Alb, Regionaler Gewerbeflächenpool Villingen-Schwenningen and neighboring municipalities – Regional Pool of Commercial Areas Neckar-Alb and Villingen-Schwenningen**

[www.rvna.de](http://www.rvna.de)

Strategy: Pool of commercial areas including a comprehensive balancing of risks and benefits

In 2004, the model of the pool of commercial areas has been developed in a feasibility study in the framework of the federal program REFINA. Basically, the municipalities involved shall insert commercial areas of their territory into the pool and jointly realize the (development and) marketing of the commercial areas on the basis of a common balancing of risks and benefits. During the field trip, the implementation of the model has been displayed by to practice examples which are:

- a) 8 municipalities of the regional association Neckar-Alb, where the model was originally developed;
- b) Municipalities from the district Schwarzwald-Baar-Heuberg (e.g. Villingen-Schwenningen, Trossingen)

## Expectations and requirements

- The model of the regionally pooling commercial areas bears the general advantages of
  - easing the competition situation;
  - reducing financial burdens by sharing costs and benefits;
  - facilitating a more professional marketing of commercial areas;
  - combining financial and personnel resources;
  - pooling the services connected to the assignment of areas and the acquisition of enterprises by one administrative body (one stop shop).
- Concerning the supply of commercial areas, a regional pool features advantages concerning the portfolio of areas: The group of municipalities can offer a set of areas of different sizes, different location factors, different prices etc, fitting to the diverse needs of different enterprises.
- A regional pool can take the following tasks: development of areas, joint marketing, assignment of areas, distribution of costs and revenues; the real estate remain property of the respective municipalities
- Basic requirements: joint strategy, mechanism of distributing costs and revenues, agreement on a model of valuing the commercial areas inserted into the pool (e.g. price of sale, standard land value, inclusion of other factors as infrastructural situation, ecology etc.)
- The development process of cooperation requires a strong conviction of all municipalities towards a far-reaching cooperation. The city and municipal councils have to be informed and integrated continuously into the process.
- An atmosphere of trust is essential to find fair and transparent solutions, in particular when it comes to sharing costs and revenues.

## Conclusions

- The basic requirement for cooperation between municipalities is strong atmosphere of trust between the responsables of the municipalities involved as well as between the mayors and the respective municipal council. One precondition is continuous and open communication between these parties.
- The municipalities involved and their negotiators have to be convinced of cooperation, to share the common objectives and to be aware of the consequences of the process; otherwise they will impede the process of cooperation and set the cooperation at risk throughout the whole process. Municipalities possibly impeding the process have (to be forced) to make the decision on their further participation in the cooperation.
- Endless negotiations of detailed regulations in an early stage can block the process and the concentration on relevant aspects. The participants should aim at simple, transparent and fair problem solutions. The rules of decision making have to be transparent and possibly should allow majority votes for details of regulations.

## Exkursionsleitung

Andreas Raab, Stadt- und Regionalplaner

## Kosten der Exkursion

Die Kosten für die zweitägige Exkursion betragen 120,- Euro je Teilnehmer inklusive Busfahrt, Verpflegung (außer Getränke), Übernachtung im DZ (EZ-Zuschlag 25,- Euro), Führung.

Wir bitten um Überweisung nach Anmeldebestätigung durch die SDL auf das Konto Nr. 240 808 832, BLZ 720 501 01, Kreissparkasse Augsburg, unter Angabe des Verwendungszwecks „Alpsee-Grünten“.

## Anmeldung

Die SDL bittet um verbindliche Anmeldung bis 15.01.2010 bei Herrn Fritz Weidlich per e-mail an [fritz.weidlich@sonthofen.de](mailto:fritz.weidlich@sonthofen.de) oder per Fax an 08321/615-294.

Bitte vollständigen Namen und Adresse angeben.

*Bitte haben Sie Verständnis dafür, dass bei Abmeldung nach dem 18.01.2010 Stornogebühren anfallen bzw. bei Abmeldung innerhalb von sieben Tagen vor Veranstaltungsbeginn oder bei Nichterscheinen die volle Gebühr in Rechnung gestellt werden muss.*



## Veranstalter

Anschrift: Schule der Dorf- und Landentwicklung  
Thierhaupten e. V. (SDL)  
**im ehem. Kloster**

Klosterberg 8  
86672 Thierhaupten  
Telefon: 08271/41441  
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Email: [info@sdl-thierhaupten.de](mailto:info@sdl-thierhaupten.de)  
Internet: [www.sdl-inform.de](http://www.sdl-inform.de)

## Interkommunales Gewerbeflächenmanagement in der Praxis

Exkursion im Rahmen des Alpenraumprojektes **COMUNIS** der Region  
**Alpsee-Grünten** mit den Gemeinden  
**Blaichach**  
**Burgberg**  
**Immenstadt**  
**Rettenberg**  
**Sonthofen**

**Donnerstag / Freitag**  
**18. / 19.02.2010**

Fortbildung



Schule der Dorf- und Landentwicklung  
**Thierhaupten**



## Exkursionsinhalte

### Industrie- und Gewerbepark Unterallgäu

[www.gewerbepark-unterallgaeu.de](http://www.gewerbepark-unterallgaeu.de)

#### Strategieprofil: interkommunales Gewerbegebiet mit Schwerpunkt Angebotsorientierung

Der Zweckverband „Industrie- und Gewerbepark Unterallgäu“ mit der Stadt Mindelheim sowie den Gemeinden Apfeltrach, Kammlach, Stetten und Unteregg wurde 2003 mit dem Ziel der Entwicklung einer gemeinsamen Gewerbefläche an der A 96 gegründet. Von den insgesamt 75 ha Gewerbefläche (teils Rahmenplan, teils Flächennutzungsplan) wurden zunächst in einem ersten Bauabschnitt 15 ha entwickelt, auf denen sich inzwischen ein erster Betrieb angesiedelt hat. Das Beispiel verdeutlicht die Organisation sowie Möglichkeiten und Grenzen eines angebotsorientierten interkommunalen Gewerbegebiets auf der Basis vergleichbarer struktureller Voraussetzungen.

### Stadtentwicklungsverband Ulm/Neu-Ulm

[www.stadtentwicklungsverband.ulm.de](http://www.stadtentwicklungsverband.ulm.de)

#### Strategieprofil: Vermarktungspool auf Basis eines gemeinsamen Standortmarketings

Der Stadtentwicklungsverband Ulm wurde 1999/2000 als Zweckverband der Städte Ulm und Neu-Ulm nach bayerischem Recht (KommZG) mit den Regelungen zur Finanzierung (über Umlagen) gegründet. Kernaufgaben des Verbandes sind u.a. die Grundstücksvermittlung und –vergabe, die Wirtschaftsförderung und Bestandspflege sowie das gemeinsame Standortmarketing. Hinsichtlich der Gewerbeflächen konzentriert sich der Verband auf die Vermarktung und Vergabe – Ankauf, Planung, Erschließung und Verkauf liegen in der Kompetenz der einzelnen Kommunen. Mit den kleineren Nachbargemeinden Elchingen, Nersingen, Dornstadt und Blaustein wurde eine Kooperationsvereinbarung zur Vermarktung von Flächen getroffen. Aktuell werden insgesamt ca. 110 ha verfügbarer Gewerbeflächen (Verbands- und Kooperationsgebiet) vermarktet, u.a. wurden in Neu-Ulm umfangreiche militärische Konversionsflächen entwickelt.

### Regionaler Gewerbeflächenpool Neckar Alb und Schwarzwald-Baar-Heuberg

[www.rvna.de](http://www.rvna.de)

#### Strategieprofil: Gewerbeflächenpool mit gemeinsamem Risiko- und Vorteilsausgleich

Das Modell eines Gewerbeflächenpools wurde im Rahmen des Bundesprogramms REFINA mit der Vorlage einer Machbarkeitsstudie im Jahr 2004 entwickelt. Das Grundmodell zielt darauf ab, dass die beteiligten Gemeinden Flächen auf eigener Gemarkung in einen Pool einbringen sowie gemeinsam die Erschließung und Vermarktung auf der Basis eines gemeinsamen Risiko- und Vorteilsausgleichs betreiben. Die Anwendung des Gewerbeflächenpools wird an zwei Praxisbeispielen aufgezeigt: a) 8 Gemeinden aus dem Regionalverband Neckar-Alb (u.a. Balingen, Hechingen), auf deren Gebietsgrundlage das Modell entwickelt wurde – eine endgültige Einigung steht jedoch noch aus. b) Kommunen aus dem Kreis Schwarzwald-Baar-Heuberg (u.a. Villingen-Schwenningen, Trossingen), die bestrebt sind, den Gewerbeflächenpool gemeinsam zu entwickeln und umzusetzen. In Villingen-Schwenningen wurden umfangreiche militärische Konversionsflächen entwickelt.

## Eingeladen sind

Bürgermeister, Fraktionsvorsitzende, Stadt- und Gemeinderäte, zuständige Verwaltungsmitarbeiter der Kommunen, Vertreter des Landratsamtes Oberallgäu und Landesamtes für Umwelt sowie verantwortliche Personen der Projektbegleitung.

## Seminarablauf

### I. Exkursionstag

**08.15 Uhr Abfahrt Rathaus Sonthofen**

**10.00 Uhr Ankunft in Mindelheim Rathaus**

Vorstellung und Diskussion  
„Gewerbepark Unterallgäu“  
Herr I. Bgm. Stephan Winter,  
Verbandsvorsitzender  
Herr Ronny Herold, Geschäftsführer

**12.00 Uhr**

**Mittagessen in Mindelheim**

**13.00 Uhr**

**Weiterfahrt nach Neu-Ulm**

**14.30 Uhr**

**Ankunft in Neu-Ulm Stadtverwaltung**

Vorstellung und Diskussion  
„Stadtentwicklungsverband  
Ulm / Neu-Ulm“  
Herr Oberbürgermeister  
Gerold Noerenberg, Stadt Neu-Ulm  
Herr Günther Grimminger u.  
Herr Bernd Neidhart,  
Wirtschaftsförderung Stadt Neu-Ulm

**17.00 Uhr**

**Weiterfahrt nach Villingen-Schwenningen**

**19.00 Uhr**

**Ankunft im Übernachtungshotel**

**20.00 Uhr**

**Gemeinsames Abendessen**

### 2. Exkursionstag

**09.00 Uhr**

**Trossingen Rathaus**

Vorstellung und Diskussion  
„Gewerbeflächenpool“  
Herr I. Bgm. Dr. Clemens Maier,  
Stadt Trossingen  
Herr Henning Keune, Amtsleiter für  
Stadtentwicklung Stadt Villingen-  
Schwenningen,  
Herr I. Bgm. Hubert Schiele,  
Gemeinde Bitz  
Herr Prof. Alfred Ruther-Melis (IfSR)

**11.30 Uhr**

**Gemeinsames Fazit**

Vorläufige Einschätzung der  
Praxisbeispiele in Übertragung auf  
Alpsee-Grünten

**12.30 Uhr**

**Mittagessen in Trossingen**

**13.30 Uhr**

**Heimreise nach Sonthofen**

**17.00 Uhr**

**Ankunft in Sonthofen**  
Änderungen vorbehalten!



## B Process, components, application

### Phase 2: Analysis

Please also regard the Excel file "COMUNIS\_phase2\_BSC-analysis.xlsx" in the attachment.

## Inter-municipal analysis of the provision of commercial land

### I General Information

|                                                                                     |                                                                                 |                               |
|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|-------------------------------|
| <b>Name of Instrument</b>                                                           | Inter-municipal analysis of the provision of commercial land                    |                               |
| <b>Development / Distribution</b>                                                   |                                                                                 |                               |
| <b>Source</b>                                                                       |                                                                                 |                               |
| <b>Purpose</b>                                                                      | Determining availability as well as quantitative and qualitative supply of land |                               |
| <b>Field of activity</b><br><i>1: main purpose</i><br><i>2: secondary purposes.</i> | 1                                                                               | Land use management           |
|                                                                                     |                                                                                 | Promotion and Communication   |
|                                                                                     | 2                                                                               | Business support and services |
|                                                                                     |                                                                                 | Other:                        |

### II Description and Contents

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>       | <p>Against the background of a possible development of an inter-municipal commercial land use management, an investigation of the availability of commercial sites in the Alpsee-Grünten region was conducted by means of a questionnaire. The survey for the various municipal administrations in the region focused in particular on:</p> <ul style="list-style-type: none"> <li>- the quantitative supply of land according to development and land use plans,</li> <li>- the spatial distribution of the available areas</li> <li>- the location conditions of the available areas</li> </ul> <p>As a result, the municipalities elaborated a compilation of existing commercial land within the Alpsee-Grünten region with regard to availability and quality.</p>                                                                                                                                                                                                                                                      |
| <b>Detailed contents</b> | <p>Content of the questionnaire:</p> <ol style="list-style-type: none"> <li>1 Overall initial conditions <ol style="list-style-type: none"> <li>1.1 Functions: What do you think is the most important role of your municipality?</li> <li>1.2 Branch structures <ol style="list-style-type: none"> <li>a) Which branches are particularly represented in your municipality?</li> <li>b) Are there any approaches to company networks, value chains, clusters etc. in your municipality or in the Alpsee-Grünten region?</li> </ol> </li> <li>1.3 General location conditions: What are the most important location advantages and disadvantages of your municipality?</li> <li>1.4 Location marketing: <ol style="list-style-type: none"> <li>a) How much significance is attached to the location marketing for the development of your municipality? High, medium, low significance? Please give a short description.</li> <li>b) What measures are you taking for location marketing?</li> </ol> </li> </ol> </li> </ol> |

|  |                                                                                                                                                                                    |
|--|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | 2 Demand / demand situation                                                                                                                                                        |
|  | 2.1 Demand for land                                                                                                                                                                |
|  | a) How high do you rate the demand for land? ... in your municipality? ... in the Alpsee-Grünten region?                                                                           |
|  | b) What measures are you taking to know the demand or the requirements of the local companies?                                                                                     |
|  | 2.2 Current demand situation                                                                                                                                                       |
|  | a) Does your municipality have inquiries from companies (like handcraft, production/industry, transport/logistics, services etc.) from within (municipality) or from outside?      |
|  | b) Which location requirements correspond to the respective inquiries – what possibly are limiting factors or problems?                                                            |
|  | 2.3 Commercial location marketing: What measures, activities have you taken so far in order to generate demand or settlements from outside?                                        |
|  | 2.4 Activities and supporting benefits from your municipality                                                                                                                      |
|  | a) Which tasks and supporting benefits do you carry out within the framework of the location and commercial development?                                                           |
|  | b) Who is responsible for the location and commercial development within your municipality? How many hours a week do you work in the field of location and commercial development? |
|  | 3 Commercial land supply                                                                                                                                                           |
|  | 3.1 Updating supply with regard to sept. 2007                                                                                                                                      |
|  | 3.2 Short description of available locations of commercial areas                                                                                                                   |
|  | • name, description                                                                                                                                                                |
|  | • stage of planning and development                                                                                                                                                |
|  | • connection, location, accessibility                                                                                                                                              |
|  | • compatibility with the surrounding areas                                                                                                                                         |
|  | • land size and layout                                                                                                                                                             |
|  | • suitability of building ground                                                                                                                                                   |
|  | • development potentials                                                                                                                                                           |
|  | • infrastructural conditions                                                                                                                                                       |
|  | • overall assessment of suitability for target groups                                                                                                                              |

### III Implementation

|                         |   |                                    |
|-------------------------|---|------------------------------------|
| <b>Responsible body</b> |   | District / regional administration |
|                         |   | Municipal council                  |
|                         |   | Municipal administration           |
|                         | x | External experts                   |
|                         |   | Other:                             |

|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                    |
|--------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|
| <b>Further persons or organizations involved</b> | x                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | District / regional administration |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Municipal council                  |
|                                                  | x                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Municipal administration           |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Business Associations              |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | SMEs                               |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Resident population                |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Other:                             |
| <b>Process of implementation</b>                 | <p>To determine the available land, questionnaires have been sent out to the municipalities. In addition, municipalities were asked to depict the available land in cadastral plans, divided into short-, medium- and long-term availability at the level of the development and land use plan. Later the questionnaire has been expanded to include a detailed description of the areas with regard to usability, infrastructure, location and development potentialities. The results from the survey showed that there was hardly useful land available for a longer-term development within the region.</p> <p>In addition, two workshops within the timeframe of two months were held in order to discuss the results of questionnaire and in order to develop a strategy for an inter-municipal land use management</p> |                                    |
| <b>Duration / frequency</b>                      | <p>The survey has been carried out only once, so far. For a future collaboration it is planned to manage the supply of commercial areas and where required properties at one single office within Alpsee-Grünten. The information shall be brought together at this one central point; therefore further surveys should not be necessary.</p> <p>The timeframe for responding to the survey was two weeks and for the analysis within the two workshops a time frame of nine weeks was necessary.</p>                                                                                                                                                                                                                                                                                                                         |                                    |
| <b>Costs</b>                                     | Labor costs for the coordination of the contents of the questionnaire and the participation in the workshops. Costs for external experts arose for the workshop moderation.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                    |
| <b>Efforts</b>                                   | The workload for filling out the questionnaire lay within the municipalities. The time to answer the questionnaire was two weeks. External experts were then responsible for the analysis of the survey results. The duration of the analysis depends on the number of participating municipalities; in this case approx. 1 day was required for the analysis.                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                    |
| <b>Spatial level of implementation</b>           | Municipality, groups of municipalities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                    |

#### IV Experiences of implementation

|                  |                                                                                                                                |
|------------------|--------------------------------------------------------------------------------------------------------------------------------|
| <b>Reference</b> | <p>Fritz Weidlich</p> <p>Stadt Sonthofen</p> <p>Rathausplatz 1</p> <p>D-87527 Sonthofen</p> <p>fritz.weidlich@sonthofen.de</p> |
|------------------|--------------------------------------------------------------------------------------------------------------------------------|

|                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Experiences</b> | <p>The building authorities of each municipality were responsible for the collection of available commercial land with regard to the quantitative and qualitative supply in their municipal area. Due to subjective estimations, the evaluation of the usability of the respective land was difficult.</p> <p>During the workshops a stronger awareness has been created of the need to implement a joint and concerted land use management in the Alpsee-Grünten region. In addition, a first list of available areas in the region has been generated.</p> |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

**V Metadata / Contact:**

|                                 |                                                                                       |                       |            |
|---------------------------------|---------------------------------------------------------------------------------------|-----------------------|------------|
| <b>Author of the fact-sheet</b> | <p>Sandra Feuerstein<br/>Stadt Sonthofen<br/>Rathausplatz 1<br/>D-87527 Sonthofen</p> | <b>Date of entry:</b> | 22.11.2011 |
|---------------------------------|---------------------------------------------------------------------------------------|-----------------------|------------|

**VI Additional Material:**

|                |                      |
|----------------|----------------------|
| <b>Picture</b> | No picture available |
|----------------|----------------------|

## Land Management Database

### I General Information

|                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                  |                               |
|------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| <b>Name of Instrument</b>                                                          | Flächenmanagement-Datenbank – Land Management Database                                                                                                                                                                                                                                                                                                                                                           |                               |
| <b>Development / Distribution</b>                                                  | Bavarian State Ministry of the Environment and Public Health                                                                                                                                                                                                                                                                                                                                                     |                               |
| <b>Source</b>                                                                      | <a href="http://www.lfu.bayern.de/kommunen/flaechenmanagement/flaechenmanagement_datensbank/index.htm">http://www.lfu.bayern.de/kommunen/flaechenmanagement/flaechenmanagement_datensbank/index.htm</a><br><br>StMUG – Bayerisches Staatsministerium für Umwelt und Gesundheit & OBB – Oberste Baubehörde am Bayerischen Staatsministerium des Innern (Hrsg.) 2010: Kommunales Flächenmanagement. München, 25 S. |                               |
| <b>Purpose</b>                                                                     | Detection, management and capitalization of internal development potential                                                                                                                                                                                                                                                                                                                                       |                               |
| <b>Field of activity</b><br><i>1: main purpose</i><br><i>2: secondary purposes</i> | 1                                                                                                                                                                                                                                                                                                                                                                                                                | Land use management           |
|                                                                                    | 2                                                                                                                                                                                                                                                                                                                                                                                                                | Promotion and Communication   |
|                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                  | Business support and services |
|                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                  | Other:                        |

### II Description and Contents

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>       | <p>The Land Management Database is a comprehensive tool facilitating the detection, management and capitalization of internal development potentials. In connection with geographic information system (GIS) municipalities can display their internal development potential graphically in form of maps. The database can be used to fulfill the following tasks:</p> <ul style="list-style-type: none"> <li>• <b>Cadastre of vacant lots and brownfields:</b> In the central module of the database, you can enter, manage and evaluate the inner development potential of your municipality. In addition to vacant lots and brownfield sites, this also comprises vacant buildings and old farmsteads.</li> <li>• <b>Addressing owners:</b> The database will help you prepare and implement a written survey of owners of vacant lots and empty buildings, and evaluate the return. The result is information, for example, on the willingness for sale or the possible need for counseling.</li> <li>• <b>Land Exchange:</b> Are land for sale, information about a real estate can be presented in an exposé and prepared for an Internet-based real estate market.</li> <li>• <b>Housing land demand:</b> Additionally you also can also compare the existing land potential with the future housing land demand and create a balance. The evaluation should be used as basis for land use planning.</li> <li>• <b>Monitoring of the internal development:</b> The database accounted for and documented the annual internal development and helps you, to present and communicate your activities in land management.</li> </ul> |
| <b>Detailed contents</b> | <p>Contents to be entered into the database:</p> <p>Location: Municipality; parish; parcel of land; address; size [m<sup>2</sup>]</p> <p>Potential: Type of land; planning status (land use plan); right to build; effective municipal</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

|  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <p>development plan or statute; site occupancy ratio (Grundflächenzahl GRZ); floor space ratio (Geschossflächenzahl GFZ).</p> <p>Framing conditions: Legal status (nature conservation, tree protection statute, flooding zone, water protection zone, natural hazards zone); immissions (noise, odor, abandoned hazardous site); Buildings (historical monument protection, construction deficiencies, characteristic building); other (missing willingness to sell, owners association, difficult layout of the lot); neighboring lot required for utilization.</p> <p>Activation: year; number of accommodation units</p> <p>Other: Maps; Pictures</p> |
|--|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### III Implementation

|                                                  |                                                                                                                                                                                                                      |                                    |
|--------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|
| <b>Responsible body</b>                          |                                                                                                                                                                                                                      | District / regional administration |
|                                                  |                                                                                                                                                                                                                      | Municipal council                  |
|                                                  | x                                                                                                                                                                                                                    | Municipal administration           |
|                                                  |                                                                                                                                                                                                                      | External experts                   |
|                                                  |                                                                                                                                                                                                                      | Other:                             |
| <b>Further persons or organizations involved</b> |                                                                                                                                                                                                                      | District / regional administration |
|                                                  |                                                                                                                                                                                                                      | Municipal council                  |
|                                                  |                                                                                                                                                                                                                      | Municipal administration           |
|                                                  |                                                                                                                                                                                                                      | Business Associations              |
|                                                  |                                                                                                                                                                                                                      | SMEs                               |
|                                                  |                                                                                                                                                                                                                      | Resident population                |
|                                                  |                                                                                                                                                                                                                      | Other:                             |
| <b>Process of implementation</b>                 | Installation of the database, survey on relevant real estate (vacant lots, brownfield sites, vacant buildings, old farmsteads etc.), insertion of the data into the database, continuous management of the database. |                                    |
| <b>Duration / frequency</b>                      | Continuous management of the database                                                                                                                                                                                |                                    |
| <b>Costs</b>                                     | The database can be obtained for free at the Bavarian State Ministry of the Environment and Health. The municipalities have to bear the labor costs for building up and managing the database.                       |                                    |
| <b>Efforts</b>                                   | The municipal administration personnel have to be trained to guarantee a proper usage of the tool. The database has to be built up and continuously managed.                                                         |                                    |
| <b>Spatial level of implementation</b>           | Municipality, groups of municipalities                                                                                                                                                                               |                                    |


### IV Experiences of implementation

|                    |                |
|--------------------|----------------|
| <b>Reference</b>   |                |
| <b>Experiences</b> | No experiences |

**V Metadata / Contact:**

|                                 |                                                                                       |                       |            |
|---------------------------------|---------------------------------------------------------------------------------------|-----------------------|------------|
| <b>Author of the fact-sheet</b> | v. Andrian-Werburg<br>Bosch & Partner GmbH<br>Pettenkoferstraße 24<br>D-80336 München | <b>Date of entry:</b> | 17.03.2011 |
|---------------------------------|---------------------------------------------------------------------------------------|-----------------------|------------|

**VI Additional Material:**

|                                                                                                                          |                                                                                     |
|--------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| <p><b>Picture</b></p> <p><i>Please provide screenshots of EDP-assisted or web-based tools, pages of surveys etc.</i></p> |  |
|--------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|



## Questionnaire to determine demand of commercial land

### I General Information

|                                                                                     |                                                                                                     |                               |
|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|-------------------------------|
| <b>Name of Instrument</b>                                                           | Questionnaire to determine demand of commercial land                                                |                               |
| <b>Development / Distribution</b>                                                   | Bosch & Partner GmbH & Nürtingen Geislingen University, Institut für Stadt- und Regionalentwicklung |                               |
| <b>Source</b>                                                                       |                                                                                                     |                               |
| <b>Purpose</b>                                                                      | Determining future demand and supply of commercial land                                             |                               |
| <b>Field of activity</b><br><i>1: main purpose</i><br><i>2: secondary purposes.</i> | 1                                                                                                   | Land use management           |
|                                                                                     |                                                                                                     | Promotion and Communication   |
|                                                                                     | 2                                                                                                   | Business support and services |
|                                                                                     |                                                                                                     | Other:                        |

### II Description and Contents

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>       | <p>The questionnaire is a comprehensive tool facilitating the determination of the future demand and supply of commercial land from local enterprises in the region. The leading question of the survey was: Do we have a lack or a surplus of areas in the future? The results can give insights into the following:</p> <ul style="list-style-type: none"> <li>Potential commercial land demand in the short-, medium- and long term</li> <li>Potential availability of commercial land</li> </ul> <p>Comparing the future commercial land demand with the supply of land will help municipalities to better steer the development of commercial areas in order to avoid oversupply. The evaluation should be used as basis for a concerted, demand orientated land use management. Additionally, information about available commercial land can be presented to companies that have a demand for land. Interested companies can then choose which area is most suitable to their wants and needs.</p> |
| <b>Detailed contents</b> | <p>Content of the questionnaire:</p> <ol style="list-style-type: none"> <li>Does your company require additional land due to expansion?</li> <li>If yes, how does the land/space requirement probably look like (production-, storage-, office- or sales areas)? <ul style="list-style-type: none"> <li>Short term (1-2 years)</li> <li>Medium term (3-5 years)</li> <li>Long term (5 years and more)</li> </ul> </li> <li>How important are the following location and infrastructure conditions for your company? <ul style="list-style-type: none"> <li>Access to public transportation (motorways etc.)</li> <li>Fast and reliable broadband</li> <li>Pollution control issues</li> <li>Possibilities of using intrinsic energy (photovoltaic)</li> </ul> </li> </ol>                                                                                                                                                                                                                                 |

|  |                                                                                                                                                                                                                                                                 |
|--|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <p>4. Does your company have commercial land which is not required anymore?</p> <p>5. If yes, which areas could be available (production-, office areas etc.)?</p> <p>6. Do you wish to speak with your mayor?</p> <p>7. Please indicate your email address</p> |
|--|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### III Implementation

|                                                  |                                                                                                                                                                                                                                   |                                    |
|--------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|
| <b>Responsible body</b>                          |                                                                                                                                                                                                                                   | District / regional administration |
|                                                  | x                                                                                                                                                                                                                                 | Municipal council                  |
|                                                  |                                                                                                                                                                                                                                   | Municipal administration           |
|                                                  |                                                                                                                                                                                                                                   | External experts                   |
|                                                  |                                                                                                                                                                                                                                   | Other:                             |
| <b>Further persons or organizations involved</b> |                                                                                                                                                                                                                                   | District / regional administration |
|                                                  |                                                                                                                                                                                                                                   | Municipal council                  |
|                                                  |                                                                                                                                                                                                                                   | Municipal administration           |
|                                                  |                                                                                                                                                                                                                                   | Business Associations              |
|                                                  | X                                                                                                                                                                                                                                 | SMEs                               |
|                                                  |                                                                                                                                                                                                                                   | Resident population                |
|                                                  |                                                                                                                                                                                                                                   | Other:                             |
| <b>Process of implementation</b>                 | Developing questionnaire, sending the survey to local companies via mail or e-mail, analyzing questionnaire, results and descriptive data as a basis for further procedures, continuous update of the enterprise data.            |                                    |
| <b>Duration / frequency</b>                      | Regular repetition of the company survey (every 2 -3 years)                                                                                                                                                                       |                                    |
| <b>Costs</b>                                     | The municipalities have to bear costs for developing and adapting the questionnaire as well as the labor costs for analyzing and conducting the questionnaire. Additional costs may occur for the shipping of the questionnaires. |                                    |
| <b>Efforts</b>                                   | The municipal administration has to collect the questionnaires, contact participants in case further inquiries are needed and has to analyze the results. In addition, the enterprise data has to be continuously updated.        |                                    |
| <b>Spatial level of implementation</b>           | Municipality, groups of municipalities                                                                                                                                                                                            |                                    |

### IV Experiences of implementation

|                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reference</b>   | <p>Fritz Weidlich<br/>Stadt Sonthofen<br/>Rathausplatz 1<br/>D-87527 Sonthofen</p> <p>Phone: + 49 (0)8321/615-279<br/>fritz.weidlich@sonthofen.de</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Experiences</b> | <p>Before we send out the questionnaires we needed a list about all local companies within our region. Thus, we asked the other municipalities to provide us a list, detailing industries, retail and craft trades, as well as building and construction industries but also to exclude hotel, restaurants and catering services. After we received the company data, some lists still contained hotels and restaurants and others were not updated. Due to financial and personal restraints, an updating of the companies' lists from the municipalities could not be realized. In the future, a stronger focus on the target group will be necessary in order to obtain valid results.</p> <p>In addition, we have had a very positive experience with the mayors and the head of the district administration. In order to express the value of the survey we asked the participating mayors and the district administrator to sign the questionnaires which they supported instantly. The response rate was also positive showing the interest of companies to communicate with municipalities. In a perspective way, a raise in the return rate is striven for.</p> |

**V Metadata / Contact:**

|                                 |                                                                                       |                       |            |
|---------------------------------|---------------------------------------------------------------------------------------|-----------------------|------------|
| <b>Author of the fact-sheet</b> | <p>Sandra Feuerstein<br/>Stadt Sonthofen<br/>Rathausplatz 1<br/>D-87527 Sonthofen</p> | <b>Date of entry:</b> | 22.03.2011 |
|---------------------------------|---------------------------------------------------------------------------------------|-----------------------|------------|

**VI Additional Material:**

|                |  |
|----------------|--|
| <b>Picture</b> |  |
|----------------|--|

Stadt Sonthofen · Postfach 1655 · 87520 Sonthofen

## Stadt Sonthofen

### Fachbereich Stadtplanung

Rathausplatz 1  
87527 Sonthofen  
Telefon 08321-615-0  
Telefax 08321-615-294  
stadt@sonthofen.de  
www.sonthofen.de

11.02.2010

AZ: 8025.4 / Wei

Tel.: 615 - 279

Fax: 615 - 294

Herr Weidlich

fritz.weidlich@sonthofen.de

Zimmer-Nr.: A1

Seite 1 von 2

### Öffnungszeiten:

Mo+Mi 08.00- 12.00 Uhr  
Mo+Mi 13.30- 17.00 Uhr  
Di 08.00- 13.00 Uhr  
Do+Fr 08.00- 12.00 Uhr  
und nach Vereinbarung

## Erhebung des Gewerbeflächenbedarfs in der Region Alpsee-Grünten

Sehr geehrte Damen und Herren,

die Städte und Gemeinden Blaichach, Burgberg, Immenstadt, Rettenberg und Sonthofen beabsichtigen ein gemeinsames Gewerbeflächenmanagement in der Region Alpsee-Grünten aufzubauen.

Unser gemeinsames Ziel ist es, zum einen in Zukunft nachfragegerechte Gewerbeflächenangebote für die Wirtschaft zur Verfügung stellen zu können, zum anderen müssen wir mit unseren Flächenreserven verantwortungsbewusst umgehen.

Für unsere weitere Arbeit ist es daher wichtig, Ihren kurz-, mittel- und langfristigen Bedarf an Gewerbeflächen zu kennen und im Rahmen unserer Gewerbeflächenpolitik berücksichtigen zu können.

Wir haben hierzu einen kurz gefassten Erhebungsbogen beigelegt und bitten Sie um Ihre Rückmeldung. Ihre Angaben werden selbstverständlich vertraulich behandelt.


Mit freundlichen Grüßen



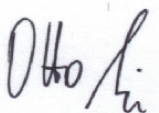
Hubert Buhl  
1. Bürgermeister Sonthofen



Armin Schaupp  
1. Bürgermeister Immenstadt



Oliver Kunz  
1. Bürgermeister Rettenberg



Otto Steiger  
1. Bürgermeister Blaichach



Dieter Fischer  
1. Bürgermeister Burgberg



Gebhard Kaiser  
Landrat

Regeln zur elektronischen  
Kommunikation:  
www.sonthofen.de

### Bankverbindung

|                  |                           |                  |                              |                          |
|------------------|---------------------------|------------------|------------------------------|--------------------------|
| Sparkasse Allgäu | HypoVereinsbank Sonthofen | Postbank München | Allgäuer Volksbank Sonthofen | Raiffeisenbank OA-Süd eG |
| Konto 315        | Konto 1 600 478           | Konto 62 147 805 | Konto 503 800                | Konto 25 003             |
| BLZ 733 500 00   | BLZ 733 223 80            | BLZ 700 100 80   | BLZ 733 900 00               | BLZ 733 699 20           |

### Steuernummern

St-Nr. 9127/114/70148  
USt-IdNr. DE128804376

**Empfänger:**

Stadt Sonthofen  
Fritz Weidlich  
Rathausplatz 1  
87527 Sonthofen

**Absender:**

Fax: (08321) 615-294  
E-Mail: fritz.weidlich@sonthofen.de

**Erhebungsbogen zum Flächenbedarf von Unternehmen**

**1. Ist für Ihr Unternehmen ein zusätzlicher Flächenbedarf für Erweiterungen o.ä. erforderlich?**

☐ Ja ☐ Nein

**2. Wenn ja, wie sieht Ihr Flächenbedarf voraussichtlich aus?**

| Flächen-<br>bedarf | Voraussichtlicher Bedarf                                        |                                  |                                    |                              |
|--------------------|-----------------------------------------------------------------|----------------------------------|------------------------------------|------------------------------|
|                    | Umfang in m²<br><br>Grundstücksflä-<br>che / Gebäude-<br>fläche | Zeitpunkt des Bedarfs und Menge  |                                    |                              |
|                    |                                                                 | kurzfristig<br>(in 1 – 2 Jahren) | mittelfristig<br>(in 3 – 5 Jahren) | langfristig<br>(ab 5 Jahren) |
| Produktionsfläche  |                                                                 |                                  |                                    |                              |
| Lagerfläche        |                                                                 |                                  |                                    |                              |
| Bürofläche         |                                                                 |                                  |                                    |                              |
| Verkaufsfläche     |                                                                 |                                  |                                    |                              |

**3. Welche Bedeutung haben für Sie folgende Standort- und Infrastrukturvoraussetzungen?**

| Bitte ankreuzen                                                      | hoch | mittel | gering |
|----------------------------------------------------------------------|------|--------|--------|
| überörtliche Verkehrsanbindung<br>(schneller Anschluss an B19)       |      |        |        |
| Hohe Datenübertragungsraten (DSL)                                    |      |        |        |
| Immissionsschutzrechtliche Belange<br>gegenüber Nachbarn oder selber |      |        |        |
| Möglichkeiten zur Eigenenergieerzeu-<br>gung (Photovoltaik)          |      |        |        |

**4. Hat Ihr Unternehmen Gewerbeflächen, die nicht mehr benötigt werden?**

☐ Ja ☐ Nein

**5. Wenn ja, welche Flächen könnten zur Verfügung gestellt werden (Frei-, Lagerflächen etc.)?**

\_\_\_\_\_

**6. Wünschen Sie ein persönliches Gespräch mit Ihrem Bürgermeister?**

☐ Ja ☐ Nein

**7. Bitte nennen Sie uns Ihre E-Mail – Adresse: \_\_\_\_\_@\_\_\_\_\_**

## Survey among businesses in the region to clarify the endogenous demand for land and premises

### I General Information

|                                                                                    |                                                                                                                      |                               |
|------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|-------------------------------|
| <b>Name of Instrument</b>                                                          | Questionnaire Foncier – Survey among businesses in the region to clarify the endogenous demand for land and premises |                               |
| <b>Development / Distribution</b>                                                  | CCIL – Délégation de Tarare                                                                                          |                               |
| <b>Source</b>                                                                      |                                                                                                                      |                               |
| <b>Purpose</b>                                                                     | Clarify the endogenous demand from local businesses for land and premises in the area of the Délégation de Tarare.   |                               |
| <b>Field of activity</b><br><i>1: main purpose</i><br><i>2: secondary purposes</i> | 1                                                                                                                    | Land use management           |
|                                                                                    |                                                                                                                      | Promotion and Communication   |
|                                                                                    | 2                                                                                                                    | Business support and services |
|                                                                                    |                                                                                                                      | Other:                        |

### II Description and Contents

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>       | <p>The objective is to identify trends and needs of businesses of the territory in terms of land and real estate in the coming years.</p> <p>Context: Local authorities are developing more and more facilities for businesses (business park, business incubator etc.); for the local authorities, this implies high cost burdens related to the investment, to debt service, and to maintenance of the infrastructures created. However the potential of the territory (in terms of attractiveness for exogenous demand), By not systematically evaluating the endogenous needs, the local authorities risk to neglect and discourage the local businesses from the area</p> <p>One of the ideas developed by the public project manager was to create a tool to identify the available land and premises that the local authorities do not have in view.</p> |
| <b>Detailed contents</b> | <p>10 questions :</p> <ol style="list-style-type: none"> <li>1. What type and what size are the current premises?</li> <li>2. Are you the owner or tenant/lessee?</li> <li>3. Does the business have business development project(s)?</li> <li>4. What is the current market of the business?</li> <li>5. Is it foreseen to change / purchase / renovate your current location?</li> <li>6. If yes, precision on the project...</li> <li>7. In which timeframe?</li> <li>8. In case your project is to purchase, what kind of structure/institutions would you go first to find an opportunity for land and/or premises? (municipality, consular, real estate agency etc...)</li> <li>9. From 1 to 5 (1 being the best mark), assess the following criteria <ul style="list-style-type: none"> <li>• Price (m²)</li> </ul> </li> </ol>                          |

|  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|--|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <ul style="list-style-type: none"> <li>• Location</li> <li>• Size / surface area</li> <li>• Availability of trade partners in the area (local network)</li> <li>• Competition in the area</li> <li>• (one criterion could be added : availability of public infrastructure)</li> </ul> <p>10. About the location, you would rather establish your business</p> <ul style="list-style-type: none"> <li>• A city center / Town center / Burg center</li> <li>• Within a business park</li> <li>• In the suburbs</li> <li>• Other...</li> <li>• In another area ....</li> </ul> |
|--|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### III Implementation

|                                                  |                                                                                                                                                                                                                        |                                    |
|--------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|
| <b>Responsible body</b>                          |                                                                                                                                                                                                                        | District / regional administration |
|                                                  |                                                                                                                                                                                                                        | Municipal council                  |
|                                                  |                                                                                                                                                                                                                        | Municipal administration           |
|                                                  |                                                                                                                                                                                                                        | External experts                   |
|                                                  | <b>X</b>                                                                                                                                                                                                               | Other: CCIL – Délégation de Tarare |
| <b>Further persons or organizations involved</b> |                                                                                                                                                                                                                        | District / regional administration |
|                                                  |                                                                                                                                                                                                                        | Municipal council                  |
|                                                  |                                                                                                                                                                                                                        | Municipal administration           |
|                                                  | <b>X</b>                                                                                                                                                                                                               | Business Associations              |
|                                                  | <b>X</b>                                                                                                                                                                                                               | SMEs                               |
|                                                  |                                                                                                                                                                                                                        | Resident population                |
|                                                  |                                                                                                                                                                                                                        | Other:                             |
| <b>Process of implementation</b>                 | <p>Developing the questionnaire and defining the targets.</p> <p>Sending the survey (or administration by phone).</p> <p>Collecting the answers, counting and analysis of answers.</p> <p>Feedback to respondents.</p> |                                    |
| <b>Duration / frequency</b>                      | Every 2 or 3 years.                                                                                                                                                                                                    |                                    |
| <b>Costs</b>                                     | Mainly labor costs... some cost for the shipping. Additional cost might be necessary for the sending of report to the respondent.                                                                                      |                                    |
| <b>Efforts</b>                                   | Except organizational effort, it is essential to keep updated the businesses listing. It represents a strong effort to first collect valuable data about the businesses, and then to keep them up to date.             |                                    |
| <b>Spatial level of implementation</b>           | 4 to 6 Communauté de communes                                                                                                                                                                                          |                                    |

#### IV Experiences of implementation

|                    |                                                                                                                                                                                                                                                                                                                               |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reference</b>   | <p>Florine GONCET<br/>CCIL-Délégation de Tarare<br/>02 rue Boucher de Perthes<br/>69170 Tarare<br/>0033 472 40 82 37<br/>goncet@lyon.cci.fr</p>                                                                                                                                                                               |
| <b>Experiences</b> | <p>This survey, as potential action to run within the COMUNIS project, wasn't agreed by the Communauté de Communes. However, it could be the opportunity to develop a tool for a better knowledge of the currently available land and premises, at short and medium term. They rather wanted us to focus on other topics.</p> |

#### V Metadata / Contact:

|                                 |                                                                                                                                                 |                       |            |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------|
| <b>Author of the fact-sheet</b> | <p>Florine GONCET<br/>CCIL-Délégation de Tarare<br/>02 rue Boucher de Perthes<br/>69170 Tarare<br/>0033 472 40 82 37<br/>goncet@lyon.cci.fr</p> | <b>Date of entry:</b> | 17/10/2011 |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------|

#### VI Additional Material:

|                |              |
|----------------|--------------|
| <b>Picture</b> | Cf. pdf-file |
|----------------|--------------|





## QUESTIONNAIRE FONCIER

FORME JURIDIQUE : ..... RAISON SOCIALE : .....

LIEU : ..... FILIERE : .....

NOM : ..... PRENOM : ..... FONCTION : .....

Q1 : Aujourd'hui, vous possédez :

### Locaux commerciaux

- ☐ Aucun
- ☐ 1
- ☐ 2
- ☐ Plus de 3
  - Surface actuelle:.....

### Locaux de production

- ☐ Aucun
- ☐ 1
- ☐ 2
- ☐ Plus de 3
  - Surface actuelle:.....

### Bureaux

- ☐ Aucun
- ☐ 1
- ☐ 2
- ☐ Plus de 3
  - Surface actuelle:.....

Q2 : Etes vous propriétaires de vos locaux?

- ☐ Oui
- ☐ Non

Q2 : Envisagez-vous des projets de développement ?

- ☐ Oui
- ☐ Non

Q3 : Vos locaux permettent-ils de mettre en œuvre des projets de développement ?

- ☐ Oui
- ☐ Non

Q4 : Actuellement, quel est la taille de votre marché ?

- ☐ Local
- ☐ Départemental
- ☐ Régional
- ☐ National
- ☐ International

Q5 : Envisagez-vous, au cours des prochaines années, d'acquérir, ou de remplacer vos locaux ?

- |                                                 |                                    |
|-------------------------------------------------|------------------------------------|
| <input type="radio"/> Oui      -> Voir Q6 et Q7 | <input type="radio"/> Location     |
| <input type="radio"/> Non                       | <input type="radio"/> Propriétaire |

➤ Q6 : Si oui, le(s)quel(s)

### Locaux commerciaux

- ☐ Relocalisation de l'activité
- ☐ Acquisition d'1 nouveau local

### Locaux de production

- ☐ Acquisition de 2 nouveaux locaux
- ☐ Relocalisation de l'activité

### Bureaux

- ☐ Acquisition d'1 nouveau local
- ☐ Acquisition de 2 nouveaux locaux



- |                                                                                                                                                                                                                                                                                                   |                                                                                                                                                          |                                                                                                                                                             |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>○ Relocalisation de l'activité<ul style="list-style-type: none"><li>➤ Surface souhaitée:.....</li><li>➤ <u>Q7 : A quel horizon ?</u></li></ul></li><li>○ Cette année</li><li>○ L'année prochaine</li><li>○ Dans 2 ou 3 ans</li><li>○ A long terme</li></ul> | <ul style="list-style-type: none"><li>○ Acquisition d'1 nouveau local<ul style="list-style-type: none"><li>➤ Surface souhaitée:.....</li></ul></li></ul> | <ul style="list-style-type: none"><li>○ Acquisition de 2 nouveaux locaux<ul style="list-style-type: none"><li>➤ Surface souhaitée:.....</li></ul></li></ul> |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|

Q8: En cas d'acquisition/relocalisation de vos locaux, vers quelle structure vous tourneriez-vous en premier lieu ?

- Mairies
- Communauté de Communes
- Agences immobilières
- Chambres Consulaires (Chambre du Commerce, Chambre des Métiers)
- Les petites annonces
- Autre(s) : Précisez : .....

Q9 : Pour vous, quels seraient les critères importants pour vos nouveaux locaux ? (Echelle de 1 à 5, par ordre croissant d'importance)

- ☐ Le prix au m<sup>2</sup>
- ☐ La localisation
- ☐ La surface
- ☐ La présence de partenaire(s) sur le même lieu
- ☐ La présence de concurrent(s)

Q10 : Concernant la localisation, vous préférez vous installer :

- En centre ville
- Dans une Zone d'Activité
- En périphérie
- Autre(s) : Précisez : .....
- Sur un autre territoire, si oui : Lequel ? : .....

Questionnaire administré par : .....

Le : .....

## Questionnaire on energy policies

### I General Information

|                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                               |
|------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| <b>Name of Instrument</b>                                                          | Questionnaire „Energy policies in Canelli, Calamandrana, Nizza Monferrato Municipalities“                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                               |
| <b>Development / Distribution</b>                                                  | Lamoro + University of Economy - ASTI                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                               |
| <b>Source</b>                                                                      | <a href="http://www.lamoro.it/comunis.php">http://www.lamoro.it/comunis.php</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                               |
| <b>Purpose</b>                                                                     | <p>Collecting information that can't be taken by public data but just directly from SMEs in order to prepare a strategy for business services connected to energetic services. The aim is to boost the competitiveness of SMEs settled in Canelli Municipality, Nizza Monferrato Municipality and Calamandrana Municipality. The questionnaire will grant:</p> <ul style="list-style-type: none"> <li>the sensibilization of enterprises about energetic challenges and management;</li> <li>the assessment of energy consumptions;</li> <li>the definition of energy saving strategies;</li> <li>the evaluation of strategic sectors where energy saving strategies could be carried out;</li> <li>the awareness of entrepreneurs.</li> </ul> |                               |
| <b>Field of activity</b><br><i>1: main purpose</i><br><i>2: secondary purposes</i> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Land use management           |
|                                                                                    | 2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Promotion and Communication   |
|                                                                                    | 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Business support and services |
|                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Other:                        |

### II Description and Contents

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>       | <p>The questionnaire has been created as a tool to collect information both at qualitative and quantitative level. It's a two pages text which contains a series of questions about relevant business data of the SMEs asking their needs and willingness concerning energetic services and potentials of their area.</p> <p>Concerning the typology of questions, multiple choice questions have been chosen, offering one or more alternatives to the interviewers. In this case, answers are fixed in advance and the interviewer cannot choose outside the answers present in the questionnaire. This setting allows the best data comparability; it directs the answer by avoiding digressions. With the questionnaire answers it is possible for the external expert to prepare a strategy for business services connected to energetic services based on COMUNIS project indications.</p> |
| <b>Detailed contents</b> | <p>The questionnaire is divided into 2 sections.</p> <p>The first one is about the SME (workers, balance sheet ...) and the second one is about more specific data with respect to the energetic policy within the SME (energy consumption data, energetic policy of the SME, investments ...)</p> <p>Some of the questions are:</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

|  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <ul style="list-style-type: none"> <li>Does the company made any kind of investments for new establishments, tools and machineries in the last 5 years?</li> <li>What is the average rate of electric consumption (Kwh and €)?</li> <li>Does the company have cogeneration plants for heat and power?</li> <li>Does the company have a photovoltaic power system?</li> <li>Did the company invest in energy saving?</li> <li>Is the company interested in projects related to energy saving?</li> </ul> |
|--|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### III Implementation

|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                               |
|--------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| <b>Responsible body</b>                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | District / regional administration                                            |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Municipal council                                                             |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Municipal administration                                                      |
|                                                  | x                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | External experts                                                              |
|                                                  | x                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Other: expert from the university + a society to distribute the questionnaire |
| <b>Further persons or organizations involved</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | District / regional administration                                            |
|                                                  | x                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Municipal council                                                             |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Municipal administration                                                      |
|                                                  | x                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Business Associations                                                         |
|                                                  | x                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | SMEs                                                                          |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Resident population                                                           |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Other:                                                                        |
| <b>Process of implementation</b>                 | The external expert has identified together with Lamoro the area in which main enterprises could be contacted. Via municipalities, a coordinated and longitudinal area inter-linked among 3 municipalities has been selected and all SMEs located on that way have been included. The questionnaire has been sent to all (via mail, fax, e-mail, by phoning etc.).                                                                                                                                                                                                                                  |                                                                               |
| <b>Duration / frequency</b>                      | The duration of the tool implementation has to be regular otherwise low results will be reached. Therefore after a first contact with the SMEs it is necessary to recall several times the reference person and ask for the compilation. Sometimes in order to get a higher answer rate it could be good to arrange a meeting. Since survey has taken several time to carry out, actually LAMORO doesn't plan to repeat the survey in a few years. Nevertheless, it could be used as a basis for future questionnaires related to Municipal analysis and/or to energetic check- up for enterprises. |                                                                               |
| <b>Costs</b>                                     | The costs that LAMORO has undertaken are related to the expert work.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                               |
| <b>Efforts</b>                                   | The main effort has been that of overcome the natural tendency to not answer to a questionnaire and to not to give away internal/private data.                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                               |
| <b>Spatial level of implementation</b>           | The area identified for this research is quite big and is included among the municipalities of Nizza Monferrato, Calamandrana and Canelli (Asti Province).                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                               |

#### IV Experiences of implementation

|                    |                                                                                                                                                                                                                                                                            |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reference</b>   | Fabio Sansalvadore<br>sansalvadore@econ.unito.it                                                                                                                                                                                                                           |
| <b>Experiences</b> | Past experiences in the field showed that in order to implement this type of instrument with high results it is necessary to follow a specific time schedule and try to talk and use all communication tools with the referring person in order to get needed information. |

#### V Metadata / Contact:

|                                 |                          |                       |             |
|---------------------------------|--------------------------|-----------------------|-------------|
| <b>Author of the fact-sheet</b> | Name: Valentina Scioneri | <b>Date of entry:</b> | 5. 05. 2011 |
|                                 | Organisation: LAMORO     |                       |             |
|                                 | Address: Via Leopardi 4  |                       |             |

#### VI Additional Material:

|                |                                           |
|----------------|-------------------------------------------|
| <b>Picture</b> | Cf. file example_lamoro_questionnaire.pdf |
|----------------|-------------------------------------------|



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# ENERGY POLICIES IN Canelli, Calamandrana, Nizza Monferrato Municipalities

## QUESTIONNAIRE

NAME OF THE COMPANY .....

DATA PROVIDED ARE RELATED TO

- ☐ The company  
☐ The plant of .....

FIELD OF ACTIVITY .....

### Qualification of the compiler

- ☐ Owner/Partner  
☐ Managing director/ Sole director  
☐ Chief executive/Financial officer/Administrative officer  
☐ Administrative operator  
☐ Consultant  
☐ Other, specify \_\_\_\_\_

CONTACT MR. ....

## ***I PART – BUSINESS SITUATION***

- 1) Does the company carried out investments in the last 5 years related to the purchase of new plants, machinery, equipments?

☐ Yes

☐ No

- 2) What is the annual turnover of your company (year 2010)? € \_\_\_\_\_  
In case of data related to the plant, please insert the turnover data produced by the plant itself, if known.

☐ Less than 1.000.000 €

☐ Between 1.000.000 and 5.000.000

☐ Between 5.000.001 and 10.000.000

☐ Up to 10.000.000

- 3) What is the amount of production costs for the company (year 2010)? € \_\_\_\_\_

In case of a plant, please insert the data related to the production cost of the plant itself, if known.

☐ Less than di 1.000.000 €

☐ Between 1.000.000 and 5.000.000

☐ Between 5.000.001 and 10.000.000

☐ Up to 10.000.000

- 4) Please insert the actual total number of employees in Your company \_\_\_\_\_

- 5) How the number of employees is changed from 2005 until today?

- It is increased ☐ -
- It is decreased ☐ -
- It is constant ☐ -

- 6) Does the company uses a structured scheme of analysis of economic data for the decisional process (as for example management accounting)?

☐ Yes

☐ No

- 7) Are they quality control systems existant in your company?

☐ Yes

☐ No

- 8) Does the company work observing management systems(more than one anwer is possible)?

- ☐ ISO 9000 certification (quality management)
- ☐ ISO 14001 certification (environmental management)
- ☐ EMAS Community Eco-Management and audit scheme
- ☐ SA 8000 certification (socio-ethic management)
- ☐ others, specify \_\_\_\_\_

## **GENERAL SECTION**

### **II PART – THE ENERGY POLICY**

1) Does the company buy electric Energy from the outside?

☐ Yes

☐ No

2) In case of positive answer, who is the electric Energy supplier for your company?

\_\_\_\_\_

3) The average electricity rate is

kw/h \_\_\_\_\_

Euro \_\_\_\_\_

- ☐ data referred to a month
- ☐ data referred to two months
- ☐ annual data
- ☐ other, specify \_\_\_\_\_

4) The electricity is used for (multiple choice)

- |                                                   |                        |
|---------------------------------------------------|------------------------|
| <input type="checkbox"/> Machinery and equipments | % of consumption _____ |
| <input type="checkbox"/> Internal lighting        | % of consumption _____ |
| <input type="checkbox"/> Room heater              | % of consumption _____ |
| <input type="checkbox"/> other, specify _____     | % of consumption _____ |

5) Does the company has energy saving cogeneration plants (combined heat and power production)?

☐ Yes

☐ No

6) Does the company has photovoltaic power system for Energy production?

☐ Yes

☐ No

7) Does the company invested in the last 5 years in Energy saving solutions (such as PV plants, less Energy absorption machineries and/ or hi-tec)?



☐ Yes

☐ No

- 8) If an internal cost economic analysis is available, Energy consumptions are periodically assessed? Nel caso in cui l'azienda disponga di un sistema interno di analisi economica dei costi, si controllano specificatamente i costi relativi ai consumi energetici

☐ Yes

☐ No

- 9) Does the company foresee investments that will be used for the decreasing of Energy consumption in the next 3 years?

☐ Yes

☐ No

- 10) Would it be possible in the future to think about renewable Energy power plants without the willingness to pay for investment costs?

☐ Yes

☐ No

- 11) In the past, does the company benefited from public grants (as for example non returnable grant, grants for interest relieves, recruitment facility, temporary lay-off)?

☐ Yes

☐ No

- 12) Is the company interested in implementing Energy saving related projects in its industrial area?

☐ Yes

☐ No

- 13) Does the company have productive areas where asbestos have to be taken away?

☐ Yes

☐ No



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# LE POLITICHE ENERGETICHE DELL'AREA Canelli, Calamandrana, Nizza monferrato

## QUESTIONARIO

NOME AZIENDA .....

DATI FORNITI NEL QUESTIONARIO RELATIVI

- ☐ All'azienda  
☐ Allo stabilimento di .....

SETTORE DI ATTIVITA' .....

**Qualifica in azienda di chi compila il questionario**

- ☐ Proprietario/Socio  
☐ Amministratore delegato/Amministratore unico  
☐ Direttore Generale/Finanziario/Amministrativo  
☐ Addetto amministrativo  
☐ Consulente  
☐ Altro, specificare \_\_\_\_\_

RIFERIMENTO AZIENDALE SIG. ....

## **PARTE I – LA REALTA' AZIENDALE**

- 1) L'azienda, negli ultimi 5 anni, ha effettuato investimenti produttivi per acquisti di nuovi impianti, macchinari, attrezzature?

☐ Si

☐ No

- 2) Qual è l'entità del fatturato dell'azienda (anno 2010)? € \_\_\_\_\_  
Nel caso di dati riferiti allo stabilimento produttivo, si inserisca, se conosciuto, il dato relativo al fatturato prodotto dallo stabilimento.

☐ Meno di 1.000.000 €

☐ Tra 1.000.000 e 5.000.000

☐ Tra 5.000.001 e 10.000.000

☐ Oltre 10.000.000

- 3) Qual è l'entità dei costi di produzione dell'azienda (anno 2010)? € \_\_\_\_\_  
Nel caso di stabilimento, si inserisca, se conosciuto, il dato relativo al fatturato prodotto dallo stabilimento.

☐ Meno di 1.000.000 €

☐ Tra 1.000.000 e 5.000.000

☐ Tra 5.000.001 e 10.000.000

☐ Oltre 10.000.000

- 4) Si indichi, attualmente, quale è il numero totale di persone occupate nella Vostra azienda \_\_\_\_\_

- 5) Il numero degli occupati totali della vostra azienda, dal 2005 ad oggi, come è variato?

- è aumentato ☐ -
- è diminuito ☐ -
- è rimasto costante ☐ -

- 6) L'azienda utilizza un sistema strutturato di analisi dei dati economici (ad esempio, contabilità analitica) a supporto delle decisioni?

☐ Sì

☐ No

- 7) Esistono sistemi di controllo della qualità

☐ Sì

☐ No

- 8) L'Azienda opera rispettando i seguenti sistemi di gestione(sono possibili più risposte)?

- ☐ certificazione ISO 9000 (gestione qualità)
- ☐ certificazione ISO 14001 (gestione ambientale)
- ☐ certificazione ambientale EMAS
- ☐ certificazione SA 8000 (qualità etico-sociale)
- ☐ altre, specificare \_\_\_\_\_

## **PARTE GENERALE**

### **PARTE II – LA POLITICA ENERGETICA**

1) L'azienda acquista energia elettrica all'esterno?

☐ Sì

☐ No

2) In caso di risposta affermativa, quale è l'operatore che attualmente fornisce energia elettrica all'azienda?

\_\_\_\_\_

3) Il consumo medio di energia elettrica è pari a kw/h \_\_\_\_\_  
Euro \_\_\_\_\_

- ☐ dato riferito ad un mese
- ☐ dato riferito ad un bimestre
- ☐ dato annuale
- ☐ altre, specificare \_\_\_\_\_

4) L'energia elettrica impiegata è utilizzata per (risposte multiple)

- |                                                                  |                     |
|------------------------------------------------------------------|---------------------|
| <input type="checkbox"/> funzionamento macchinari e attrezzature | % del consumo _____ |
| <input type="checkbox"/> illuminazione interna                   | % del consumo _____ |
| <input type="checkbox"/> riscaldamento dei locali                | % del consumo _____ |
| <input type="checkbox"/> altro, specificare _____                | % del consumo _____ |

5) L'azienda dispone di impianti di cogenerazione ad alta efficienza (produzione congiunta di energia elettrica e termica)?

☐ Sì

☐ No

6) L'azienda dispone un sistema fotovoltaico di produzione dell'energia?

☐ Sì

☐ No

7) Negli ultimi 5 anni l'azienda ha realizzato investimenti per il risparmio energetico (ad esempio, impianti fotovoltaici, macchinari con minore assorbimento di energia e/o tecnologicamente avanzati)?

☐ Sì

☐ No

- 8) Nel caso in cui l'azienda disponga di un sistema interno di analisi economica dei costi, si controllano specificatamente i costi relativi ai consumi energetici

☐ Sì

☐ No

- 9) L'azienda ha intenzione di effettuare nei prossimi 3 anni investimenti produttivi destinati a ridurre i consumi energetici?

☐ Sì

☐ No

- 10) Nel futuro, pensate che possa essere considerata come un'opportunità la dotazione di impianti di produzione di energia rinnovabile senza sostenere costi di investimento?

☐ Sì

☐ No

- 11) L'azienda ha beneficiato, nel passato, di agevolazioni pubbliche (ad esempio, contributi a fondo perduto, contributi in conto interessi, agevolazioni per nuove assunzioni, cassa integrazione)?

☐ Sì

☐ No

- 12) L'azienda è interessata a implementare progetti di risparmio energetico o di produzione energetica a livello di area industriale?

☐ Sì

☐ No

- 13) L'azienda presenta aree produttive caratterizzate dalla presenza di amianto da rimuovere?

☐ Sì

☐ No

## Questionnaire on Industrial Ecology

### I General Information

|                                                                                    |                                                                                                                                                    |                               |
|------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| <b>Name of Instrument</b>                                                          | Questionnaire on Industrial Ecology                                                                                                                |                               |
| <b>Development / Distribution</b>                                                  | <ul style="list-style-type: none"> <li>• Ville de Sierre / Promotion économique</li> <li>• Solutions for industrial ecosystems (SOFIES)</li> </ul> |                               |
| <b>Source</b>                                                                      | www.sierre.ch (rubric téléchargement, Questionnaire destiné aux entreprises concernant l'Ecologie Industrielle)                                    |                               |
| <b>Purpose</b>                                                                     | Identify priorities for future of businesses in the town of Sierre in terms of sustainable development.                                            |                               |
| <b>Field of activity</b><br><i>1: main purpose</i><br><i>2: secondary purposes</i> |                                                                                                                                                    | Land use management           |
|                                                                                    |                                                                                                                                                    | Promotion and Communication   |
|                                                                                    | 1                                                                                                                                                  | Business support and services |
|                                                                                    |                                                                                                                                                    | Other:                        |

### II Description and Contents

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>       | The project Sierre industrial synergy aims to identify trails of improvement for a more economic and environmentally friendly resource and waste management. In the context of the current financial crisis and the rising energy prices, it's about creating opportunities and ensuring a competitive position. Industrial ecology is one element that can help to achieve this dual objective. The aim of this questionnaire is to discover the interest of business and their potential within the proposed industrial synergies in Sierre.                          |
| <b>Detailed contents</b> | <ul style="list-style-type: none"> <li>• General information (name, contact person within the institution, environmental officer within the institution, activities of the institution)</li> <li>• Sustainable development in the establishment, today (existence of a environmental management system, internal valuation, sorting waste, sustainable mobility)</li> <li>• Priorities in terms of sustainable development for tomorrow</li> <li>• Industrial synergies with other institutions (existing industrial synergies, opportunities for synergies)</li> </ul> |

### III Implementation

|                         |   |                                    |
|-------------------------|---|------------------------------------|
| <b>Responsible body</b> |   | District / regional administration |
|                         |   | Municipal council                  |
|                         | x | Municipal administration           |
|                         | x | External experts                   |
|                         |   | Other:                             |

|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                    |
|--------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|
| <b>Further persons or organizations involved</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | District / regional administration |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Municipal council                  |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Municipal administration           |
|                                                  | x                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Business Associations              |
|                                                  | x                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | SMEs                               |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Resident population                |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Other:                             |
| <b>Process of implementation</b>                 | <p>In January 2009 the town of Sierre has lead a survey with approx. 1'516 businesses of the area - 44 (3% Primary), 223 (15% Secondary) and 1'249 (82% Tertiary).</p> <ul style="list-style-type: none"> <li>Defining the purpose of the investigation</li> <li>Determination of objectives and working hypotheses</li> <li>Determination of the survey population</li> <li>Drafting of the questionnaire</li> <li>Testing of the draft questionnaire</li> <li>Drafting of the final questionnaire</li> <li>Hardware realization of the investigation</li> <li>Sifting through the data</li> <li>Report writing</li> </ul> |                                    |
| <b>Duration / frequency</b>                      | <p>Frequency: single-use</p> <p>Duration: 1-2 month</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                    |
| <b>Costs</b>                                     | The cost of sending questionnaires by mail and the labor cost of recall and follow up with businesses has been important.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                    |
| <b>Efforts</b>                                   | Efforts have focused on advocacy work in industrial ecology. Numerous reminders to get the questionnaires to the companies have concentrated the rest of the efforts.                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                    |
| <b>Spatial level of implementation</b>           | Municipality                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                    |

#### IV Experiences of implementation

|                  |                                                                                                                                                                                                                                                                                                                                                                          |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reference</b> | <p><a href="http://www.sierre.ch/fr/economie/ecologie-industrielle/introduction-642-2589">http://www.sierre.ch/fr/economie/ecologie-industrielle/introduction-642-2589</a></p> <p>Ville de Sierre</p> <p>Promotion économique</p> <p><b>Serge Ballestraz</b></p> <p><b>Hôtel de ville, rue du bourg 14</b></p> <p><b>3960 Sierre</b></p> <p><b>Tel : 027 4520240</b></p> |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Experiences</b> | <p>Ideally, the survey questionnaire should be followed by meetings with companies having the greatest potential. These meetings should be set beforehand by telephone after agreement. To optimize the dynamics of trade, economic representative, ideally from the economic promotion of the city, will lead the discussion. Experts of the investigated domain should be invited to the interview in order to guide the content and ensure genuine expertise. The presence of politicians should be avoided. An interview report showing the substance of the questionnaire's results and suggesting courses of action must be presented to the companies visited.</p> <p>In July 2009, fifteen companies have been visited as part of the project of industrial ecology conducted in the town of Sierre. The objectives were to create a trust relationship with the enterprise, to obtain data on incoming and outgoing material flow, and to provide a personalized return on first results of the preliminary inquiry by questionnaire (report with list of synergies detected and the procedure in case of interest).</p> |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

**V Metadata / Contact:**

|                                 |                                                           |                       |            |
|---------------------------------|-----------------------------------------------------------|-----------------------|------------|
| <b>Author of the fact-sheet</b> | STUMM<br>HES-SO Valais<br>TechnoArk 3<br>CH - 3960 Sierre | <b>Date of entry:</b> | 13.05.2011 |
|---------------------------------|-----------------------------------------------------------|-----------------------|------------|

**VI Additional Material:**

|                |                        |
|----------------|------------------------|
| <b>Picture</b> | No additional material |
|----------------|------------------------|





# Verkehrssituation im Passeiertal

**im Rahmen des Alpine Space-Projektes  
„COMUNIS – Interkommunale Kooperation für die strategische  
Steuerung KMU-orientierter Standortentwicklung im Alpenraum“**

Fragebogen für Gemeindereferenten und  
Wirtschaftstreibende in den Gewerbegebieten

Institut für Regionalentwicklung und Standortmanagement

Miriam L. Weiß

Europäische Akademie Bozen

Drususallee 1, 39100 Bozen

Tel.: 0471-055 326

[Miriam.Weiss@eurac.edu](mailto:Miriam.Weiss@eurac.edu)

**Persönliche Angaben**

Unternehmen: \_\_\_\_\_

Name : \_\_\_\_\_

Gemeinde: \_\_\_\_\_

Gewerbegebiet: \_\_\_\_\_

**1. Güterverkehrssituation****1.1. Wo liegen aus Ihrer Sicht die vordringlichsten verkehrlichen Probleme im Tal für die Betriebe in den Gewerbegebieten? Warum?**

|                                 | Dringlichkeit            |                          |                          |                          |                          | Warum? |
|---------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------|
|                                 | Hoch<br>++               | +                        | 0                        | -                        | Keine<br>--              |        |
| Straßenführung durch das Tal    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Verkehrsaufkommen zu Stoßzeiten | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Zufahrtsstraßen Gewerbegebiete  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Leerfahrten                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Sonstige:                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |

**1.2. Welche Lösungsmöglichkeiten sehen Sie für diese/s Problem/e? Warum? Welche hätten eine große Bedeutung/positive Auswirkung auf die Verkehrssituation?**

|                                                                        | Bedeutung/Auswirkung        |                          |                          |                          |                          | Warum? |
|------------------------------------------------------------------------|-----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------|
|                                                                        | sehr hoch/<br>positiv<br>++ | +                        | 0                        | -                        | keine/<br>negativ<br>--  |        |
| Straßenumbau/-ausbau Talstraße                                         | <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Temporäres Fahrverbot für Schwerverkehr                                | <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Temporäres Fahrverbot für Leichtverkehr                                | <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Anbindungswege von Hauptstraße zum Gewerbegebiet ausbauen / optimieren | <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Bilden von Betriebs-/ Zuliefererkooperationen                          | <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Zwischengemeindliche Gütertransportbörse zur Leerfahrtenoptimierung    | <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Zentrales Güterverteilzentrum                                          | <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Wo?    |
| Sonstige:                                                              | <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |

## 2. Pendlerverkehrssituation

### 2.1. Wo liegen aus Ihrer Sicht für Pendler die vordringlichsten Verkehrsprobleme im Tal?

|                                                                          | Dringlichkeit            |                          |                          |                          |                          | Warum? |
|--------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------|
|                                                                          | Hoch<br>++               | +                        | 0                        | -                        | Keine<br>--              |        |
| Busfahrzeiten unpassend für Arbeitszeiten                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Schlechter Anschluss an ÖPNV in den Gewerbegebieten (keine Haltestellen) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Verkehrsaufkommen zu Stoßzeiten (lange Anfahrt)                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Sonstige:                                                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |

### 2.2. Welche Lösungsmöglichkeiten sehen Sie für diese/s Problem/e?

Welche hätten eine große Bedeutung / positive Auswirkung für die Pendler?

|                                                               | Bedeutung/Auswirkung     |                          |                          |                          |                          | Warum? |
|---------------------------------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------|
|                                                               | Hoch<br>++               | +                        | 0                        | -                        | Keine<br>--              |        |
| Veränderung der Linienführung                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Einführung zusätzl. Haltestellen                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Fahrplananpassung (an Arbeitszeiten)                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Zwischengemeindliche Pendlerbörse                             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Inner-/zwischenbetriebliche Pendlerbörse                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Verbesserte ÖPNV-Information (Zugang zu; Apps, Aushang, etc.) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |
| Sonstige:                                                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |        |

**Herzlichen Dank für Ihre wertvolle Mitarbeit!**

# Business Needs Survey

## [ Region 2020]



| 1. GENERAL INFORMATION                                                    |  |                                                                                                                                                                                |                                               |                                                           |
|---------------------------------------------------------------------------|--|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------|-----------------------------------------------------------|
| 1.1. Company Name:                                                        |  |                                                                                                                                                                                |                                               |                                                           |
| 1.2. Contact Person:                                                      |  |                                                                                                                                                                                | E-mail:                                       |                                                           |
| 1.3. Business Address:                                                    |  | Street:                                                                                                                                                                        | Town, post code:                              |                                                           |
| 1.4. NACE Code:                                                           |  |                                                                                                                                                                                |                                               |                                                           |
| 1.5. Year of Foundation:                                                  |  |                                                                                                                                                                                | Number of employees (of which in the region): | Total:                                                    |
|                                                                           |  |                                                                                                                                                                                |                                               | Region:                                                   |
| 1.6. Main products:                                                       |  |                                                                                                                                                                                |                                               |                                                           |
| 1.7. Main markets:                                                        |  |                                                                                                                                                                                |                                               |                                                           |
| 2. BUSINESS LOCATION                                                      |  |                                                                                                                                                                                |                                               |                                                           |
| 2.1. Is your Business                                                     |  | <input type="checkbox"/> Reallocated                                                                                                                                           | <input type="checkbox"/> Home based           | <input type="checkbox"/> This is one of several locations |
| ➤ If reallocated,...                                                      |  | From where:                                                                                                                                                                    | Why?                                          |                                                           |
| 2.2. What are the current ownership relationships of your premises?       |  | <input type="checkbox"/> Company ownership<br><input type="checkbox"/> Rent<br><input type="checkbox"/> Both: partly ownership, partly rent<br><input type="checkbox"/> Other: |                                               |                                                           |
| 2.3. Do you perceive current location [option: ] to be positive location? |  | <input type="checkbox"/> YES                                                                                                                                                   | Why?                                          |                                                           |
|                                                                           |  | <input type="checkbox"/> NO                                                                                                                                                    | Why?                                          |                                                           |
| 2.4. Do you expect to expand your facilities at region                    |  | .... Within the next 12 months                                                                                                                                                 | <input type="checkbox"/> YES                  | <input type="checkbox"/> NO                               |
|                                                                           |  | .... Within the next 2-3 years?                                                                                                                                                | <input type="checkbox"/> YES                  | <input type="checkbox"/> NO                               |
|                                                                           |  | We will downsize the business and we expect empty space.                                                                                                                       | <input type="checkbox"/> YES                  | <input type="checkbox"/> NO                               |
| ➤ If expansion is foreseen,                                               |  | where?                                                                                                                                                                         |                                               |                                                           |
|                                                                           |  | for what purposes?                                                                                                                                                             |                                               |                                                           |

|                                                                                                                |                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                | <b>what are you looking for</b>                                                              | <input type="checkbox"/> Greenfield ..... m2 and further construction<br><input type="checkbox"/> Existing modern buildings of ..... m2<br><input type="checkbox"/> An existing industrial site which can be Brownfield of..... m2<br><input type="checkbox"/> We own our own land or premises for expansion                                                                                                                                                                                                                                          |
|                                                                                                                | <b>what would be the highest price for m2 you are still willing to pay for purchasing...</b> | <input type="checkbox"/> Fully equipped Greenfield ready for construction per m2: .....€<br><input type="checkbox"/> Production space ready for moving in per m2:.....€<br><input type="checkbox"/> Office space per m2:.....€<br><input type="checkbox"/> Shop space per m2:.....€                                                                                                                                                                                                                                                                   |
| <b>2.5. Which are the threats and problems jeopardizing the expansion at one of above mentioned locations?</b> |                                                                                              | <input type="checkbox"/> Costs of land<br><input type="checkbox"/> Costs of construction<br><input type="checkbox"/> High municipal taxes<br><input type="checkbox"/> Poor public infrastructure (what precisely?)<br><input type="checkbox"/> Slow procedures related to change of land usages (spatial planning)<br><input type="checkbox"/> Slow procedures at obtaining building permits<br><input type="checkbox"/> Other administration barriers (which?)<br><input type="checkbox"/> Access to funding<br><input type="checkbox"/> Other:..... |

Remarks:

### 3. HUMAN RESOURCES

|                                                                                                         |                                                               |                                    |                                              |                                                   |
|---------------------------------------------------------------------------------------------------------|---------------------------------------------------------------|------------------------------------|----------------------------------------------|---------------------------------------------------|
| <b>3.1. Do you expect to hire more employees?</b>                                                       | <b>.... within the Next 12 months</b>                         | <input type="checkbox"/> YES       | <input type="checkbox"/> NO                  | ➤ If yes, how many:                               |
|                                                                                                         | <b>.... within the Next 2-3 years?</b>                        | <input type="checkbox"/> YES       | <input type="checkbox"/> NO                  | ➤ If yes, how many:                               |
|                                                                                                         | <b>We will downsize the business and we expect redundancy</b> | <input type="checkbox"/> YES       | <input type="checkbox"/> NO                  | ➤ If yes, how many:<br>➤ When?                    |
| <b>3.2. If employment growth is expected,</b>                                                           |                                                               |                                    |                                              |                                                   |
| ➤ <b>what level of education will be required?</b>                                                      | <input type="checkbox"/> Primary                              | <input type="checkbox"/> Secondary | <input type="checkbox"/> Tertiary: Graduated | <input type="checkbox"/> Tertiary: Post-graduates |
| ➤ <b>How many ?</b>                                                                                     | <input type="checkbox"/>                                      | <input type="checkbox"/>           | <input type="checkbox"/>                     | <input type="checkbox"/>                          |
| ➤ <b>In which job profiles?</b>                                                                         | <input type="checkbox"/>                                      | <input type="checkbox"/>           | <input type="checkbox"/>                     | <input type="checkbox"/>                          |
| <b>3.3. Do you expect the need for training and re-training of existing employees in next year's?</b>   |                                                               |                                    | <input type="checkbox"/> YES                 | <input type="checkbox"/> NO                       |
| ➤ <b>If YES, which skills and trainings are required?</b>                                               |                                                               |                                    |                                              |                                                   |
| <b>3.4. Are the local schools responding to your HR needs in terms of quality and profiles offered?</b> |                                                               |                                    | <input type="checkbox"/> YES                 | <input type="checkbox"/> NO                       |
| ➤ <b>If NO, what has to be changed?</b>                                                                 |                                                               |                                    |                                              |                                                   |

|                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>3.5. How do you organise your training and HR programmes?</b>                                                                                         | <input type="checkbox"/> Cooperation with secondary schools from the region (which one?)<br><input type="checkbox"/> Cooperation with inter-enterprise centres (MIC) – which ones<br><input type="checkbox"/> Hiring different commercial HR and training companies<br><input type="checkbox"/> Using internal resources<br><input type="checkbox"/> Using our own training centre<br><input type="checkbox"/> Cooperation with regional scholarship programmes<br><input type="checkbox"/> Other                                                                                                                                                                                                                                                                                                             |
| <b>Remarks:</b>                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <h2 style="text-align: center;">4. BUSINESS DEVELOPMENT</h2>                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>4.1. What are short-term (12 months) perspectives of your business?</b>                                                                               | <input type="checkbox"/> Significant decrease of turnover [more than - 20%]<br><input type="checkbox"/> Decrease of turnover [up to - 20%]<br><input type="checkbox"/> Keeping the existing scope of business as previous year<br><input type="checkbox"/> Slow growth by increasing the turnover up to 10%<br><input type="checkbox"/> Growth of turn over 10%                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>4.2. What are mid-term (2-3 years) perspectives of your business?</b>                                                                                 | <input type="checkbox"/> Decrease<br><input type="checkbox"/> Keeping the existing scope of business as previous year<br><input type="checkbox"/> Slow growth<br><input type="checkbox"/> Accelerated growth                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>4.3. What is holding back and jeopardising competitiveness and growth of your business? What are your weaknesses?</b>                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>4.4. What are your the major strategic developments, products, changes or technological investments foreseen within the next midterm perspective?</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>4.5. What kind of regional business services and infrastructure would help improving the competitiveness your business</b>                            | Services<br><input type="checkbox"/> Advice and information in accessing new markets<br><input type="checkbox"/> Advice in financial consolidation of company<br><input type="checkbox"/> Special advice in business optimisation and increasing the productivity<br><input type="checkbox"/> Special advice in product development and innovation<br><input type="checkbox"/> Advice in HR and career development<br><input type="checkbox"/> Supporting the transfer of know-how (R&D)<br><input type="checkbox"/> Introduction and improvements of IT<br><input type="checkbox"/> Introduction of standards (which?)<br><input type="checkbox"/> Improvement of regional image<br><input type="checkbox"/> Facilitation of setting up business networks and value chains<br><input type="checkbox"/> Other |

|                                                                      |                                                                                                                                                                                                                                     |                                                    |                                                 |
|----------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|-------------------------------------------------|
|                                                                      | <b>Infrastructure</b><br><input type="checkbox"/> Technological centre for .....<br><input type="checkbox"/> Business Incubator<br><input type="checkbox"/> Know-how transfer office<br><input type="checkbox"/> Technological park |                                                    |                                                 |
| <b>4.6. How much are you willing to pay for consulting services?</b> | <input type="checkbox"/> Up to 5.000 € per year                                                                                                                                                                                     | <input type="checkbox"/> 5.000 € - 15.000 per year | <input type="checkbox"/> Over 15.000 € per year |

Remarks:

## 5. ASSESMENT OF GENERAL BUSINESS IMAGE OF THE REGION

| 5.1. How important are the following factors for your business operation? |                                           |                                           |                                        |
|---------------------------------------------------------------------------|-------------------------------------------|-------------------------------------------|----------------------------------------|
| <b>Site availability</b>                                                  | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Cost of space</b>                                                      | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Finding relevant workforce</b>                                         | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Availability of Business support services</b>                          | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Chamber of commerce</b>                                                | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Business Associations and networks</b>                                 | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Local taxes</b>                                                        | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Traffic connections</b>                                                | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Access to highway</b>                                                  | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Access to railway</b>                                                  | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Access to airport</b>                                                  | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Number and proximity of customers</b>                                  | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Safety</b>                                                             | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Raw materials availability</b>                                         | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Proximity of Suppliers</b>                                             | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Housing Costs</b>                                                      | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |

|                                                                                                                        |                                           |                                           |                                        |
|------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|-------------------------------------------|----------------------------------------|
| <b>Housing Quality</b>                                                                                                 | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Town/municipality public utility (parking, public transport, ..)</b>                                                | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Town/municipality social services (schools, kindergarten, health centres,..)</b>                                    | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Leisure and sport facilities</b>                                                                                    | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Culture facilities and events</b>                                                                                   | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>Other factors:</b>                                                                                                  | <input type="checkbox"/> No/minor concern | <input type="checkbox"/> Moderate concern | <input type="checkbox"/> Major concern |
| <b>5.2. What are to your opinion major opportunities for economic growth of the region in the next years?</b>          |                                           |                                           |                                        |
| <b>5.3. Would you be interested of a visit of mayor and /or regional management organisation in your company? Why?</b> | <input type="checkbox"/> YES              | <input type="checkbox"/> NO               |                                        |
| <b>5.4. Would you like to obtain e-news and invitation to events organised by regional management organisation?</b>    | <input type="checkbox"/> YES              | <input type="checkbox"/> NO               |                                        |
| <b>Remarks:</b>                                                                                                        |                                           |                                           |                                        |
|                                                                                                                        |                                           |                                           |                                        |

**Thank you for your co-operation.**

Results will be published by ..... at [www.bsc-kranj.si](http://www.bsc-kranj.si)



## Potential events for businesses contacts

### I General Information

|                                                                                    |                                                                                                |                               |
|------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|-------------------------------|
| <b>Name of Instrument</b>                                                          | Potential events for businesses contacts (exemplary list)                                      |                               |
| <b>Development / Distribution</b>                                                  | CCIL                                                                                           |                               |
| <b>Source</b>                                                                      | CCIL<br>Local authorities                                                                      |                               |
| <b>Purpose</b>                                                                     | Foster networking; provide tools et services to answer businesses needs, promotion of an area. |                               |
| <b>Field of activity</b><br><i>1: main purpose</i><br><i>2: secondary purposes</i> | 2                                                                                              | Land use management           |
|                                                                                    | 1                                                                                              | Promotion and Communication   |
|                                                                                    | 2                                                                                              | Business support and services |
|                                                                                    |                                                                                                | Other:                        |

### II Description and Contents

|                                              |                                                                                                                                                                                                                                                                                                                                        |
|----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>                           | No matter who is the organizer (municipality, group of municipalities, consular chambers) the main point of organization is gathering key actors, key partners and facilitators.<br>An event might be a good opportunity to develop Public and Private partnership.                                                                    |
| <b>Detailed contents (examples of event)</b> | <b>Occasional events/Yearly event :</b><br>With a thematic focus: entrepreneurship, international development, innovation etc...<br>Businesses visits: Open House<br><br><b>Regular advice sessions with external expert, partners:</b> For instance about law, accountant, international, intellectual property right, copyright etc. |

### III Implementation

|                                                  |   |                                                                   |
|--------------------------------------------------|---|-------------------------------------------------------------------|
| <b>Responsible body</b>                          |   | District / regional administration                                |
|                                                  |   | Municipal council                                                 |
|                                                  | X | Municipal administration in accordance with the municipal council |
|                                                  |   | External experts                                                  |
|                                                  | X | Other: Consular Chambers                                          |
| <b>Further persons or organizations involved</b> |   | District / regional administration                                |
|                                                  |   | Municipal council                                                 |
|                                                  |   | Municipal administration                                          |
|                                                  | X | Business Associations                                             |
|                                                  | X | SMEs                                                              |
|                                                  |   | Resident population                                               |

|                                        |                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                        | Other:                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Process of implementation</b>       | <p>Definition of the topics / thematic focus</p> <p>Research of partners and funding</p> <p>Development of the communication tools and invitations</p> <p>Mailing / sending of invitations</p> <p>Reservation for computing, rooms etc.</p> <p>Registering the participants</p> <p>Welcoming ...</p> <p>Beware that some logistical aspects must be thought from the beginning</p>                                      |
| <b>Duration / frequency</b>            | <p>Depending on the type of event and the public concerned:</p> <p>At the scale of a municipality (or group of municipalities), it is advisable to organize one important event per year, having a different thematic focus each year (entrepreneurship, international, local businesses fair etc.)</p> <p>For regular advice session: 1 half day each month could be enough...</p>                                     |
| <b>Costs</b>                           | <p>Depending on the type of event and the public concerned:</p> <p>Labor cost related to the organization.</p> <p>Additional costs are to be foreseen concerning catering, communication and publicity, remunerated external expert, rent of material (tables, chairs, sound effects, computing etc.)</p> <p>Some of those costs could be shared between partners. It could be also possible to ask for fundings...</p> |
| <b>Efforts</b>                         | <p>Organizing an event requires a significant investment of time and financial means. The main effort will be to research the partners needed and to gather key actors and facilitators.</p>                                                                                                                                                                                                                            |
| <b>Spatial level of implementation</b> | <p>Depending on the topics and the public concerned...</p>                                                                                                                                                                                                                                                                                                                                                              |

#### IV Experiences of implementation

|                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reference</b>   | <p><i>Florine GONCET CCIL =&gt; <a href="http://www.lyon.cci.fr">www.lyon.cci.fr</a> : Agenda-des-reunions-et-manifestations-de-la-CCI-de-Lyon</i></p> <p><i>Simon PEYRACHE : Pays de Tarare (group of municipalities) =&gt; Les ECO-Rencontres</i></p> <p>Local authorities in partnership with Rhône-Alpes region, "Businesses visits" : <a href="http://www.visites-entreprises-rhone-alpes.fr/">http://www.visites-entreprises-rhone-alpes.fr/</a></p>                                                                                                                   |
| <b>Experiences</b> | <p>The potential of attending existing events should not be underestimated. Attention is needed to gauge the relevance of the event with what we wish to present. Being present everywhere and for all is not a solution, the concept of return on investment must be calculated. The "return on investment" is not only to be seen in terms of financial return but also in terms of contact made and validated, the impact on the image etc ...</p> <p>It is also advisable to carefully select the addressees, as SMEs do not like to receive too many solicitations.</p> |

**V Metadata / Contact:**

|                                 |                                                                                          |                       |            |
|---------------------------------|------------------------------------------------------------------------------------------|-----------------------|------------|
| <b>Author of the fact-sheet</b> | GONCET Florine<br>CCIL-Délégation de Tarare<br>02 rue Boucher de Perthes<br>69170 Tarare | <b>Date of entry:</b> | 20.10.2011 |
|---------------------------------|------------------------------------------------------------------------------------------|-----------------------|------------|

**VI Additional Material:**

|                |                                   |
|----------------|-----------------------------------|
| <b>Picture</b> | See table next page with examples |
|----------------|-----------------------------------|

## CCI du Lyon Events

| Events                                                                                      | Objectives                                                                                                                                                                                                                                                                                                                                                                                                    | Recurrence                                                                                       | Organization                                             | Targets                                       | Participants :<br>partners and ex-<br>perts                                                   | Participants:<br>Public (busi-<br>nesses, enter-<br>preneurs etc.)               |
|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|----------------------------------------------------------|-----------------------------------------------|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| <b>Forum de l'Inter-<br/>national</b>                                                       | <ul style="list-style-type: none"> <li>- Important event for the support to businesses for international development</li> <li>- Propose to businesses helpful solutions to conquer new markets and develop their sales in export</li> <li>- Exhibitions by partners as COFACE, UBIFRANCE, ERAI etc...</li> <li>- Meeting with experts by countries (e.g. Germany, USA, Arabic countries UAE etc.).</li> </ul> | 1 time per year since 3 years<br>12-13 avril 2011                                                | CCI LYON                                                 | Young and confirmed businesses                | 50                                                                                            | 239                                                                              |
| <b>Forum des asso-<br/>ciations d'entre-<br/>prises<br/>(businesses as-<br/>sociations)</b> | <ul style="list-style-type: none"> <li>- Discover actions and projects of businesses associations and networks established in the Rhone.</li> <li>- Meet and chat with the drivers actions, and adhere to structures.</li> </ul>                                                                                                                                                                              | 1 time per years                                                                                 | CCI LYON                                                 | Business managers and businesses associations | 33                                                                                            | 200                                                                              |
| <b>Salon des Entre-<br/>preneurs</b>                                                        | -Exhibition dedicated to entrepreneurs                                                                                                                                                                                                                                                                                                                                                                        | 1 time per year<br>15-16 june 2011                                                               | Les Echos<br>CCI de Lyon is a<br>partners                | Young and future entrepreneurs                | 150                                                                                           | 18 870                                                                           |
| <b>Club Export + Club<br/>innovation</b>                                                    | <ul style="list-style-type: none"> <li>- Exchange about your experiences abroad and innovation in a friendly atmosphere.</li> <li>- In every club comes an expert (e.g about a country, how to finance export and/or innovation ...)</li> </ul>                                                                                                                                                               | Every 2 month.<br>From 12h-14h30 with a<br>meal tray                                             | CCI Tarare                                               | Business manager,<br>export manger etc ;      | 1 or 2                                                                                        | Approx. 10 people per meeting                                                    |
| <b>Permanence INPI</b>                                                                      | Information on industrial and intellectual property in France.                                                                                                                                                                                                                                                                                                                                                | 1 time per month                                                                                 | CCI Tarare                                               | For all kind of businesses                    | 1 INPI consultant                                                                             | 5 per afternoon                                                                  |
| <b>EGE (Etat généraux<br/>des entreprises)</b>                                              | Construction and development of the new mandate plan (CCIL policy) with all (or part) of businesses throughout the CCIL.<br>Ambitious event launched by the new president of the CCIL Philippe Grillot.                                                                                                                                                                                                       | 2 big event in Lyon<br>"Proximity meeting"<br>from the 11 au 26 May<br>2011<br>Final event 22/09 | CCI Lyon<br>Meeting in Tarare<br>the 23rd et 24th<br>mai | Business managers                             | Animation by CCIL.<br>The Tarare team<br>animate the Tarare's events and in other delegations | In Tarare we are expecting<br>30 retailers and<br>60 industrials<br>and services |

## Guidelines on Commercial Location Development

### Annex

|                       |                                                                                                                                                                                                                                                                         |                                                                                    |                                                                            |                                                                                                                                                |                        |                                           |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|----------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|-------------------------------------------|
| <b>ECO Rencontres</b> | <ul style="list-style-type: none"> <li>-Gathering of all economic actors to promote the area and the mobilization, enabling businesses to promote their activities and jobs.</li> <li>- This year the thematic is dedicated to entrepreneurs and businesses.</li> </ul> | <p>1 time per year, each year under a different thematic</p> <p>Novembre 2011.</p> | <p>Communauté de Communes du Pays de Tarare. CCIL-Tarare is a partner.</p> | <p>Usually: Workers, businesses, students and schools, teachers etc...</p> <p>This year, the focus is made on entrepreneurs and businesses</p> | <p>20 participants</p> | <p>150 to 600 depending on the topic.</p> |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|----------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|-------------------------------------------|

## Analysis of local Value Chains

### I General Information

|                                                                                        |                                                                                                                                                                                                                                                                           |                               |
|----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| <b>Name of Instrument</b>                                                              | Analysis of local Value Chains (2009)                                                                                                                                                                                                                                     |                               |
| <b>Development / Distribution</b>                                                      | CCIL-Délégation de Tarare<br>Cluster Venture (external Expert)                                                                                                                                                                                                            |                               |
| <b>Source</b>                                                                          |                                                                                                                                                                                                                                                                           |                               |
| <b>Purpose</b>                                                                         | Highlight strength and weaknesses of each field of activity within a selected area (e. g food processing, wood industry etc.)<br><br>Offer a prospective and concerted vision for the economic orientation of a territory. Implement actions in line with the orientation |                               |
| <b>Field of activity</b><br><br><i>1: main purpose</i><br><i>2: secondary purposes</i> | 1                                                                                                                                                                                                                                                                         | Land use management           |
|                                                                                        |                                                                                                                                                                                                                                                                           | Promotion and Communication   |
|                                                                                        | 2                                                                                                                                                                                                                                                                         | Business support and services |
|                                                                                        |                                                                                                                                                                                                                                                                           | Other:                        |

### II Description and Contents

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>       | <p>Due to the cyclical and structural elements present and future, including the arrival of the A89 motorway, it seemed important to examine changes and adjustments to be made for now and for the coming years. It must contribute to the achievement of objectives allowing all economic stakeholders of the territory to carry out an ambitious economic strategy and attractive.</p> <p>To achieve this study, in partnership with an external consultancy, several working groups have been established. Moreover, this study has been focused on three chains of the economy representative of the Territory:</p> <ul style="list-style-type: none"> <li>→ The Food Processing Industries</li> <li>→ The Textile</li> <li>→ The wood and construction</li> </ul> |
| <b>Detailed contents</b> | <p>For methodology , please refer to the guidelines : <u>"S3C2 Analysis, 2.4 Analysis of value chains and supply chains "</u>.</p> <p>See below <u>"figure 1 to 3"</u>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

### III Implementation

|                         |   |                                    |
|-------------------------|---|------------------------------------|
| <b>Responsible body</b> |   | District / regional administration |
|                         |   | Municipal council                  |
|                         | X | Municipal administration           |
|                         | X | External experts                   |
|                         | X | Other: consular Chambers           |

|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                    |
|--------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|
| <b>Further persons or organizations involved</b> | X                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | District / regional administration |
|                                                  | X                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Municipal council                  |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Municipal administration           |
|                                                  | X                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Business Associations              |
|                                                  | X                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | SMEs                               |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Resident population                |
|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Other:                             |
| <b>Process of implementation</b>                 | <ul style="list-style-type: none"> <li>Deciphering the value chain (e.g. Following Porter's concepts and businesses workshops) (<i>see figure 2</i>)</li> <li>Identification of scenarios for the territory, (<i>see figure 1</i>). (Following political orientation and potentialities of the territory).</li> <li>Conditions for success: mainly based on benchmarking and regarding the skills and potential of the area as well as its "failure" and gap. (According to outputs from the businesses workshop).</li> <li>Definition of the spatial strategy and development plan according to the collect and identification of the concerns by local stakeholders.</li> </ul> |                                    |
| <b>Duration / frequency</b>                      | <u>Duration</u> : Between 6 months and 1 year.<br><u>Frequency</u> : Singular study                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                    |
| <b>Costs</b>                                     | Labor cost for CCIL, additional cost for the "official restitution".<br>External expert, consulting agency: depending on the study and the area concerned, the cost can get twice as much.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                    |
| <b>Efforts</b>                                   | Gather local stakeholders (private and public) to participate in discussion and debates to fulfill the diagnosis and express their needs and worries.<br>Collect valuable data about each field of activity concerned from different sources.                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                    |
| <b>Spatial level of implementation</b>           | Several municipalities<br>The whole Communauté de Communes de Tarare was concerned, 16 municipalities (approx. 22000 inhabitants)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                    |

#### IV Experiences of implementation

|                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reference</b>   | Stéphane Barral : CCIL-Délégation de Tarare<br>Franck Gautheron : <a href="#">Cluster Venture</a>                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Experiences</b> | Good involvement from the local stakeholders in discussion and debates. The outputs were oriented and structuring for further actions and projects, in which stakeholders were still committed according to their fields of activity.<br>We had no substantial written report of this study, only a power point (75 pages) and an "official restitution". A report would have been really helpful to catch all content and methodology some time after the study. |

#### V Metadata / Contact:

|                                 |                                                                                                                                                                             |                       |            |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------|
| <b>Author of the fact-sheet</b> | Florine GONCET<br>CCIL-Délégation de Tarare<br>02 rue Boucher de Perthes<br>69170 Tarare<br><a href="mailto:goncet@lyon.cci.fr">goncet@lyon.cci.fr</a><br>0033 472 40 82 37 | <b>Date of entry:</b> | 21.10.2011 |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------|

## VI Additional Material:

**Picture**

*Please provide screenshots of EDP-assisted or web-based tools, pages of surveys etc.*

**Cluster Venture**

### CONCLUSIONS SUR LES SCENARIOS

**Coûts €**

**Développement économique**

**Economie artisanale**

- Prioriser sur les marchés locaux
- Favoriser quelques marchés de niches
- Laisser faire la régulation économique

**Banlieue moderne**

- Installation résidentielle
- Excellence des modes de transports
- Service logistique de Lyon
- Confort de vie / tranquillité
- Activités de fin de semaine
- Services de proximité

**Fertilisation du territoire**

- Développer un service de soutien de proximité
- Fédérer les forces vivantes et structurer l'implication entrepreneuriale locale
- Adapter les services disponibles
- Favoriser les interactions territoriale et économique...
- Dynamiser un collectif pour développer ses spécialisations

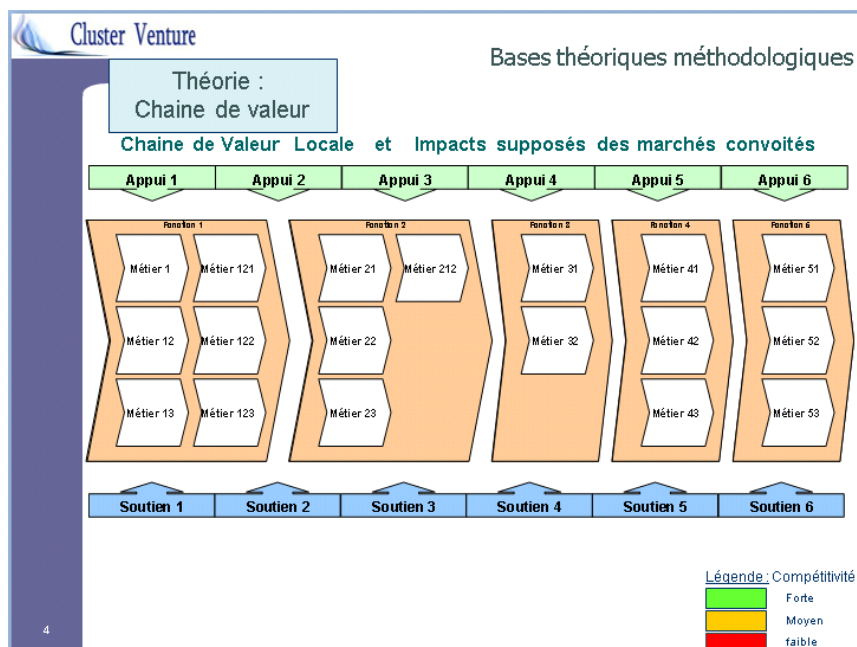
**Green Technologies**

- Infrastructure spécifique
- Proximité de la recherche et centre de formation
- Systèmes couteux d'attractivité territoriale (ex Canadien)
- Soutien politique de 1<sup>er</sup> ordre
- Budget pharaonique

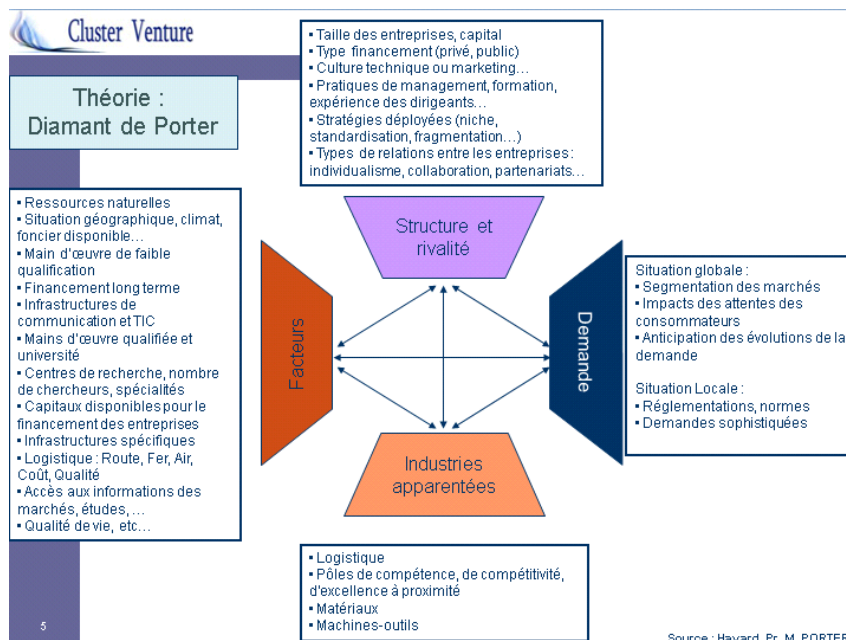
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**FIGURE 1 : SCENARIO**





**FIGURE 2 : VALUE CHAIN according to Michael PORTER**



**FIGURE 3 : PORTER'S DIAMOND**

## Image Analysis

### I General Information

|                                                                                    |                                                                                                                                                                                                                                                                                      |                                                        |
|------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|
| <b>Name of Instrument</b>                                                          | Image Analysis (Tarare)                                                                                                                                                                                                                                                              |                                                        |
| <b>Development / Distribution</b>                                                  | CCI de Lyon –Délégation de Tarare                                                                                                                                                                                                                                                    |                                                        |
| <b>Source</b>                                                                      |                                                                                                                                                                                                                                                                                      |                                                        |
| <b>Purpose</b>                                                                     | <p>Measure/ evaluate the dynamism, the atmosphere, the feeling of belonging and the image of the area.</p> <p>Obtain a critical feedback on the perception of the city, and see where and how the situation could improve on the basis of constructive discussion and hard data.</p> |                                                        |
| <b>Field of activity</b><br><i>1: main purpose</i><br><i>2: secondary purposes</i> |                                                                                                                                                                                                                                                                                      | Land use management                                    |
|                                                                                    | 1                                                                                                                                                                                                                                                                                    | Promotion and Communication                            |
|                                                                                    |                                                                                                                                                                                                                                                                                      | Business support and services                          |
|                                                                                    | 2                                                                                                                                                                                                                                                                                    | Other: Support/ partnership with local authorities.... |

### II Description and Contents

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>       | <p>This survey was initiated by the CCI of Lyon - Delegation of Tarare, after the observation that the image of the city of Tarare was/is negative. Thus, in 2009, the decision was taken to conduct a survey among city residents and outsiders.</p> <p>The “Study of the perceived image of the City of Tarare” had the objective to come to know the internal and external perception of Tarare in order to establish actions in line with the key issues and objectives of the territory.</p>                                                                                                                                                                              |
| <b>Detailed contents</b> | <p><b><i>Insiders : possible content</i></b></p> <p><u>Housing</u></p> <ul style="list-style-type: none"> <li>• Rental prices/cost (including local taxation)</li> <li>• Accessibility</li> <li>• Accessibility to ownership</li> <li>• Housing availability</li> </ul> <p><u>Power and buying behavior</u></p> <ul style="list-style-type: none"> <li>• Leisure cost</li> <li>• Cost of living</li> </ul> <p><u>Job</u></p> <ul style="list-style-type: none"> <li>• Wage level</li> <li>• Geographic situation</li> <li>• Accessibility</li> </ul> <p><u>Proximity/local services</u></p> <ul style="list-style-type: none"> <li>• Retailing</li> <li>• Education</li> </ul> |

|  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|--|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <ul style="list-style-type: none"> <li>Public services including health related services</li> <li>Culture</li> </ul> <p><u>Transport infrastructure</u></p> <ul style="list-style-type: none"> <li>Public transportation</li> <li>Traffic</li> <li>Road</li> </ul> <p><u>General location factors</u></p> <ul style="list-style-type: none"> <li>Landscape</li> <li>Esthetic and quality of the city</li> <li>Dynamism</li> <li>Want to stay or leave</li> </ul> <p><u>General information about the respondent</u></p> <ul style="list-style-type: none"> <li>Age</li> <li>Sex</li> <li>Residency</li> <li>Socio-professional category</li> </ul> <p><b><i>Outsiders: possible content</i></b></p> <p><u>General location factors</u></p> <ul style="list-style-type: none"> <li>Landscape</li> <li>Esthetic and quality of the city</li> <li>dynamism</li> <li>Attractiveness</li> </ul> <p><u>Detail about the perception</u></p> <ul style="list-style-type: none"> <li>On what basis is the perception the image of the city (professional experience, related to the communication, political point of view etc...)</li> </ul> <p><u>General information about the respondent</u></p> <ul style="list-style-type: none"> <li>Age</li> <li>Sex</li> <li>Residency</li> <li>Socio-professional category</li> </ul> <p><u>Frequenting</u></p> <ul style="list-style-type: none"> <li>Visit / journey in the city. Frequency</li> <li>Use of the city service , frequency</li> </ul> |
|--|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### III Implementation

|                  |   |                                    |
|------------------|---|------------------------------------|
| Responsible body |   | District / regional administration |
|                  |   | Municipal council                  |
|                  | X | Municipal administration           |
|                  |   | External experts                   |
|                  | X | Other: CCI                         |

|                                                  |                                                                                                                                                                                                                                                                                         |                                    |
|--------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|
| <b>Further persons or organizations involved</b> |                                                                                                                                                                                                                                                                                         | District / regional administration |
|                                                  |                                                                                                                                                                                                                                                                                         | Municipal council                  |
|                                                  |                                                                                                                                                                                                                                                                                         | Municipal administration           |
|                                                  |                                                                                                                                                                                                                                                                                         | Business Associations              |
|                                                  |                                                                                                                                                                                                                                                                                         | SMEs                               |
|                                                  | <b>X</b>                                                                                                                                                                                                                                                                                | Resident population                |
|                                                  |                                                                                                                                                                                                                                                                                         | Other:                             |
| <b>Process of implementation</b>                 | Proposition: The whole survey could be conducted by phone. As qualitative criteria were of major importance, personal contact is advisable.                                                                                                                                             |                                    |
| <b>Duration / frequency</b>                      | In order to monitor the evolution of the image, we would advise to repeat a similar survey several years after the first survey (3 to 10 years). It could be useful to assess the evolution of the image and the impact of possible actions taken.                                      |                                    |
| <b>Costs</b>                                     | Mainly labor cost. In that case, a person was working nearly fulltime on the survey. In order to achieve higher relevance and a more objective analysis, an external expert could conduct the study and analyse the results. But this would be related to significant additional costs. |                                    |
| <b>Efforts</b>                                   |                                                                                                                                                                                                                                                                                         |                                    |
| <b>Spatial level of implementation</b>           | City and suburbs, nearby areas                                                                                                                                                                                                                                                          |                                    |

#### IV Experiences of implementation

|                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reference</b>   | Ville de Tarare<br>69170 Tarare<br>France                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Experiences</b> | <p>The results of the survey were only analyzed in a simple way, displaying only the relative distribution of answers according to the classes “absolutely not” to “completely” with respect to the single questions. It would have been appropriate to conduct more demanding statistical tests concerning e.g. significance or correlation to draw more relevant conclusions. But those tests were not performed.</p> <p>Concerning the questionnaire addressed to the “insiders”, it would also have been advisable to consider the proportions of residents outside the city and those of the city to a larger extent</p> <p>In addition, the two questionnaires were quite different and did not allow a joint analysis of the results. Hence it would be advisable to write two questionnaires with closely related and similar contents in order to be able to cross the data.</p> |

**V Metadata / Contact:**

|                                 |                                                                                                                                                                                     |                       |            |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------|
| <b>Author of the fact-sheet</b> | GONCET Florine<br>CCI de LYON, Délégation de Tarare<br>02 rue Boucher de Perthes<br>69170 Tarare<br>0033 472 40 82 37<br><a href="mailto:goncet@lyon.cci.fr">goncet@lyon.cci.fr</a> | <b>Date of entry:</b> | 17.10.2011 |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------|

**VI Additional Material:**

|                |                    |
|----------------|--------------------|
| <b>Picture</b> | See questionnaires |
|----------------|--------------------|

# QUESTIONNAIRE IMAGE DE TARARE PERÇUE PAR LES HABITANTS DU PAYS DE TARARE

La Délégation de Tarare (Chambre de Commerce et d'Industrie de Lyon), la Ville de Tarare, la Communauté de Communes de Tarare et la Région mènent une étude d'analyse de l'image perçue de Tarare. Pour cela, nous invitons les habitants du Pays de Tarare à bien vouloir répondre au questionnaire suivant. Il n'y a pas de bonnes ou mauvaises réponses.

Q1. Sans aucune retenue, pouvez-vous nous citer les mots qui vous viennent à l'esprit de façon spontanée lorsque vous penser à la ville de Tarare ?

|     |     |     |
|-----|-----|-----|
| ... | ... | ... |
| ... | ... | ... |

**Veuillez répondre aux questions suivantes s'il vous plaît (cocher la case qui vous convient) :**

|                                                                                                                        | Pas du tout | Pas vraiment | Plutôt oui | Complètement | Sans opinion |
|------------------------------------------------------------------------------------------------------------------------|-------------|--------------|------------|--------------|--------------|
| Q2. Les loyers à Tarare sont-ils abordables ?                                                                          |             |              |            |              |              |
| Q3. L'accès à la propriété est-il facile à Tarare (achat de maison, appartement) ?                                     |             |              |            |              |              |
| Q4. La fiscalité de la ville de Tarare est-elle très attrayante (taxe foncière, taxe d'habitation) ?                   |             |              |            |              |              |
| Q5. Les salaires proposés par les entreprises locales (publiques/privées) sont-ils attractifs ?                        |             |              |            |              |              |
| Q6. Les prix d'entrée des lieux de loisirs (centre nautique l'aquaval, cinéma, théâtre) sont-ils raisonnables ?        |             |              |            |              |              |
| Q7. Le prix des consommations dans les restaurants / cafés sont-ils abordables ?                                       |             |              |            |              |              |
| Q8. A Tarare, le coût de la vie est-il globalement abordable ?                                                         |             |              |            |              |              |
| Q9. Y-a-t-il assez de logements à Tarare ?                                                                             |             |              |            |              |              |
| Q10. A Tarare, les logements sont-ils de qualité (spacieux, bon état) ?                                                |             |              |            |              |              |
| Q11. L'offre en emploi est-elle suffisamment diversifiée ?                                                             |             |              |            |              |              |
| Q12. A Tarare, les services administratifs sont-ils de qualité ?                                                       |             |              |            |              |              |
| Q13. La ville de Tarare est-elle géographiquement bien située en termes d'activités professionnelles ou de formation ? |             |              |            |              |              |

|                                                                                                      | <b>Pas du tout</b> | <b>Pas vraiment</b> | <b>Plutôt oui</b> | <b>Complètement</b> | <b>Sans opinion</b> |
|------------------------------------------------------------------------------------------------------|--------------------|---------------------|-------------------|---------------------|---------------------|
| Q14. A Tarare, la circulation en voiture est-elle bonne ?                                            |                    |                     |                   |                     |                     |
| Q15. A Tarare, la sécurité piétonne est-elle bonne ?                                                 |                    |                     |                   |                     |                     |
| Q16. A Tarare, est-il pratique de se déplacer à pied ?                                               |                    |                     |                   |                     |                     |
| Q17. A Tarare, est-il pratique de se déplacer en vélo ?                                              |                    |                     |                   |                     |                     |
| Q18. La région dispose-t-elle de bonnes liaisons routières externes ?                                |                    |                     |                   |                     |                     |
| Q19. Les dessertes bus/train sont-elles suffisantes ?                                                |                    |                     |                   |                     |                     |
| Q20. Y-a-t-il suffisamment de places de stationnement à Tarare ?                                     |                    |                     |                   |                     |                     |
| Q21. La sécurité physique des personnes et des biens est-elle bonne à Tarare ?                       |                    |                     |                   |                     |                     |
| Q22. A Tarare, l'offre commerciale est-elle de qualité ?                                             |                    |                     |                   |                     |                     |
| Q23. A Tarare, l'offre de garderie des enfants (crèches) est-elle satisfaisante ?                    |                    |                     |                   |                     |                     |
| Q24. A Tarare, les activités de loisirs sont-elles globalement suffisantes pour vous ?               |                    |                     |                   |                     |                     |
| Q25. A Tarare, les structures d'enseignement sont-elles de qualité ?                                 |                    |                     |                   |                     |                     |
| Q26. A Tarare, l'offre en enseignement est-elle suffisamment diversifiée ?                           |                    |                     |                   |                     |                     |
| Q27. La ville de Tarare offre-t-elle suffisamment d'espaces verts, lieux de détente ?                |                    |                     |                   |                     |                     |
| Q28. A Tarare, la qualité de l'offre médicale est-elle bonne ?                                       |                    |                     |                   |                     |                     |
| Q29. Y'a-t-il assez de lieux de divertissements (restaurants/café, vie nocturne) à Tarare ?          |                    |                     |                   |                     |                     |
| Q30. Vous sentez-vous bien informé des événements de la ville de Tarare ?                            |                    |                     |                   |                     |                     |
| Q31. Le patrimoine historique de Tarare est-il important ?                                           |                    |                     |                   |                     |                     |
| Q32. La ville de Tarare possède-t-elle des symboles forts (monuments, personnages historiques,...) ? |                    |                     |                   |                     |                     |
| Q33. Tarare est-elle accueillante ?                                                                  |                    |                     |                   |                     |                     |
| Q34. Tarare est-elle dynamique ?                                                                     |                    |                     |                   |                     |                     |
| Q35. Tarare est-elle conviviale ?                                                                    |                    |                     |                   |                     |                     |

|                                                                   | Pas du tout | Pas vraiment | Plutôt oui | Complètement | Sans opinion |
|-------------------------------------------------------------------|-------------|--------------|------------|--------------|--------------|
| Q36. Tarare est-elle vivante ?                                    |             |              |            |              |              |
| Q37. Tarare est-elle connue ?                                     |             |              |            |              |              |
| Q38. Tarare est-elle une ville calme ?                            |             |              |            |              |              |
| Q39. Tarare est-elle une ville dortoir ?                          |             |              |            |              |              |
| Q40. Tarare a-t-elle une bonne réputation ?                       |             |              |            |              |              |
| Q41. Les alentours de Tarare (paysages naturels) sont-ils beaux ? |             |              |            |              |              |
| Q42. Les bâtiments de la ville de Tarare sont-ils beaux ?         |             |              |            |              |              |
| Q43. Tarare est-elle une belle ville ?                            |             |              |            |              |              |
| Q44. L'image que vous avez de Tarare est-elle globalement bonne ? |             |              |            |              |              |

Répondez **seulement si vous habitez à Tarare** :

|                                                            | Pas du tout | Pas vraiment | Plutôt oui | Complètement | Sans opinion |
|------------------------------------------------------------|-------------|--------------|------------|--------------|--------------|
| Q45. Aimez-vous vivre à Tarare ?                           |             |              |            |              |              |
| Q46. Dans l'avenir, souhaitez-vous rester vivre à Tarare ? |             |              |            |              |              |
| Q47. Avez-vous déjà pensé à quitter Tarare ?               |             |              |            |              |              |

48. Si vous avez déjà pensé à quitter Tarare, veuillez préciser, s'il vous plaît, vos motivations principales :

...

### Fiche signalétique :

Q49. Vous êtes : ☐ une femme ☐ un homme

Q50. Vous êtes âgé de :

- ☐ Moins de 18 ans
- ☐ Entre 18 et 29 ans
- ☐ Entre 30 et 49 ans
- ☐ Entre 50 et 64 ans
- ☐ 65 ans et +

Q51. Votre profession (ou votre ancienne activité si vous êtes retraité) :

- ☐ Agriculteur
- ☐ Chef d'entreprise/commerçant/artisan
- ☐ Cadre
- ☐ Indépendant
- ☐ Employé
- ☐ Enseignant
- ☐ Ouvrier
- ☐ Homme/femme au foyer
- ☐ Etudiant/apprenti
- ☐ Sans emploi



Q52. Votre lieu d'habitation :

- |                                                 |                                                      |
|-------------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> Affoux                 | <input type="checkbox"/> Saint-Appolinaire           |
| <input type="checkbox"/> Ancy                   | <input type="checkbox"/> Saint-Clément sous Valsonne |
| <input type="checkbox"/> Dareizé                | <input type="checkbox"/> Saint-Forgeux               |
| <input type="checkbox"/> Dième                  | <input type="checkbox"/> Saint-Loup                  |
| <input type="checkbox"/> Joux                   | <input type="checkbox"/> Saint-Marcel L'Eclairé      |
| <input type="checkbox"/> Les Olmes              | <input type="checkbox"/> Saint-Romain de Popey       |
| <input type="checkbox"/> Les Sauvages           | <input type="checkbox"/> Tarare                      |
| <input type="checkbox"/> Pontcharra sur Turdine | <input type="checkbox"/> Valsonne                    |

Q53. Depuis combien de temps y-habitez-vous :

- ☐ Moins d'1 an
- ☐ Entre 1 et 5 ans
- ☐ Entre 6 et 10 ans
- ☐ Plus de 10 ans

**MERCI BEAUCOUP POUR VOTRE CONTRIBUTION !**

## QUESTIONNAIRE IMAGE PERÇUE DE TARARE DE L'EXTERIEUR

La Délégation de Tarare (Chambre de Commerce et d'Industrie de Lyon), la Ville de Tarare, la Communauté de Communes de Tarare et la Région mènent une étude d'analyse de l'image perçue de Tarare. Pour cela, nous invitons toutes les personnes extérieures à la ville et au Pays de Tarare à bien vouloir répondre au questionnaire suivant. Merci de vous abstenir si vous ne connaissez pas du tout la ville. Il n'y a pas de bonnes ou mauvaises réponses.

Q1. Sans aucune retenue, pouvez-vous nous citer les mots qui vous viennent à l'esprit de façon spontanée lorsque vous pensez à la ville de Tarare ?

|     |     |     |
|-----|-----|-----|
| ... | ... | ... |
| ... | ... | ... |

**Veuillez-nous indiquer votre degré d'accord avec les affirmations suivantes :**

|                                                                                           | Tout à fait d'accord | Plutôt d'accord | Pas d'accord | Pas du tout d'accord |
|-------------------------------------------------------------------------------------------|----------------------|-----------------|--------------|----------------------|
| Q2. Tarare est une ville où il fait « bon vivre ».                                        |                      |                 |              |                      |
| Q3. Visuellement, Tarare est une « belle » ville.                                         |                      |                 |              |                      |
| Q4. Tarare est une ville conviviale.                                                      |                      |                 |              |                      |
| Q5. Tarare est une ville dynamique au niveau économique.                                  |                      |                 |              |                      |
| Q6. Tarare est une ville dynamique au niveau culturel.                                    |                      |                 |              |                      |
| Q7. Tarare est une ville attrayante au niveau touristique.                                |                      |                 |              |                      |
| Q8. Pour des personnes qui souhaiteraient s'installer, Tarare est une ville accueillante. |                      |                 |              |                      |
| Q9. Tarare donne l'image d'une ville vieillissante.                                       |                      |                 |              |                      |
| Q10. Tarare est une ville où l'Histoire est importante.                                   |                      |                 |              |                      |
| Q11. Tarare dispose de conditions climatiques très avantageuses.                          |                      |                 |              |                      |
| Q12. Tarare est située dans une région très agréable.                                     |                      |                 |              |                      |
| Q13. Tarare dispose d'infrastructures modernes.                                           |                      |                 |              |                      |
| Q14. Tarare affiche un fort taux de chômage.                                              |                      |                 |              |                      |
| Q15. Le nombre d'entreprises investissant à Tarare baisse.                                |                      |                 |              |                      |
| Q16. Tarare est une ville sportive.                                                       |                      |                 |              |                      |
| Q17. Tarare donne l'image d'une ville joyeuse, gaie.                                      |                      |                 |              |                      |

|                                                                             | <b>Tout à fait d'accord</b> | <b>Plutôt d'accord</b> | <b>Pas d'accord</b> | <b>Pas du tout d'accord</b> |
|-----------------------------------------------------------------------------|-----------------------------|------------------------|---------------------|-----------------------------|
| Q18. Tarare est une ville dortoir.                                          |                             |                        |                     |                             |
| Q19. Tarare est une ville à laquelle je suis très attaché(e) affectivement. |                             |                        |                     |                             |
| Q20. Globalement, Tarare est une ville agréable.                            |                             |                        |                     |                             |

**A votre avis sur quoi se fonde l'image que vous avez de la ville ?**

|                                               | <b>Tout à fait d'accord</b> | <b>Plutôt d'accord</b> | <b>Pas d'accord</b> | <b>Pas du tout d'accord</b> |
|-----------------------------------------------|-----------------------------|------------------------|---------------------|-----------------------------|
| Q21. Sur mon expérience personnelle.          |                             |                        |                     |                             |
| Q22. Sur le bouche à oreille autour de moi.   |                             |                        |                     |                             |
| Q23. Sur la communication faite par la ville. |                             |                        |                     |                             |
| Q24. Sur mes opinions politiques.             |                             |                        |                     |                             |
| Q25. Autres (précisez s.v.p.) :               | ...                         |                        |                     |                             |

Q26. Si vous aviez une opportunité professionnelle à Tarare, envisageriez-vous de vous y installer ?

☐ Oui

☐ Non

Pourquoi :

.....

Q27. Vous êtes : ☐ une femme      ☐ un homme

Q28. Vous êtes âgé de :

☐ Moins de 18 ans

☐ Entre 18 et 29 ans

☐ Entre 30 et 49 ans

☐ Entre 50 et 64 ans

☐ 65 ans et +

Q29. Votre profession (ou votre ancienne activité si vous êtes retraité) :

☐ Agriculteur

☐ Enseignant

☐ Chef d'entreprise/commerçant/artisan

☐ Ouvrier

☐ Cadre

☐ Homme/femme au foyer

☐ Indépendant

☐ Etudiant/apprenti

☐ Employé

☐ Sans emploi

Q30. Vous avez déjà habité à Tarare : ☐ oui      ☐ non

Si oui, combien de temps :

☐ Moins d'1 an

☐ Entre 1 et 5 ans

☐ Entre 6 et 10 ans

☐ Plus de 10 ans

Q31. Vous habitez dans la ville de : ...

Code postal : ...

**MERCI BEAUCOUP POUR VOTRE CONTRIBUTION !**

## Phase 3: Development



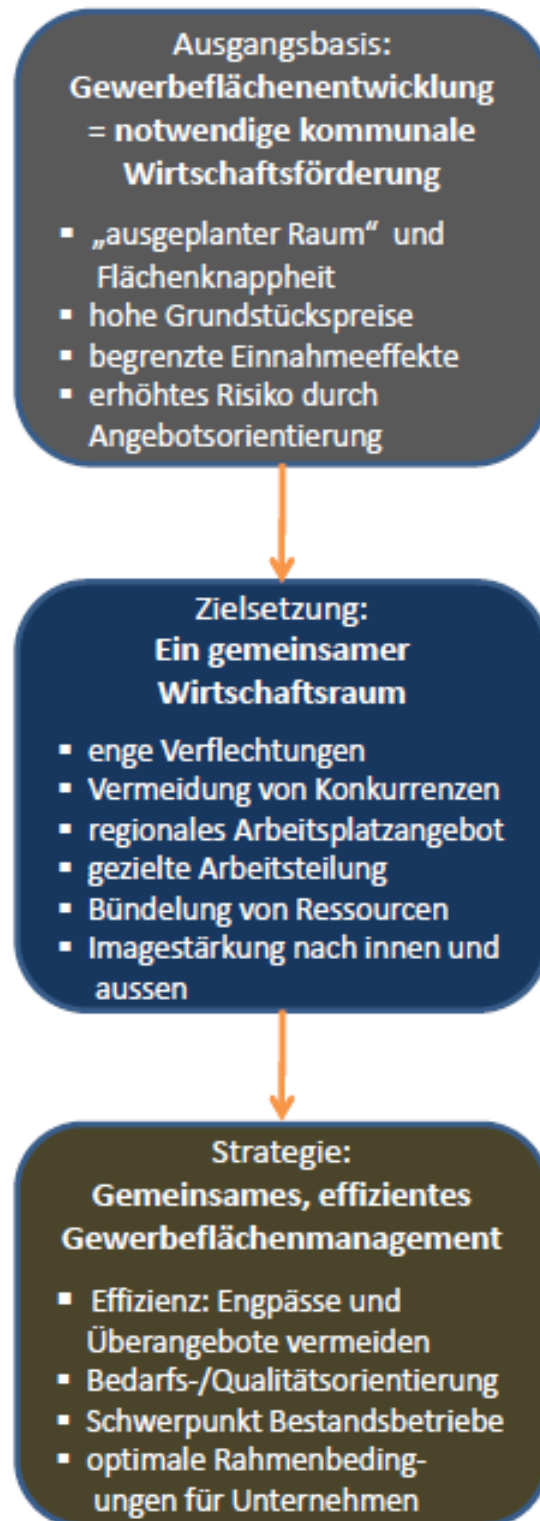
## **Argumentationslinie – Vermittlung des Ansatzes eines interkommunalen Gewerbeflä- chenmanagements für die Re- gion Alpsee-Grünten nach innen und außen**

### **Autor:**

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### **Date:**

7<sup>th</sup> December 2010



**Abb. 1: Argumentationslinie**

## Erläuterung

### 1. Ausgangsbasis

#### Gewerbeflächenentwicklung = notwendige kommunale Wirtschaftsförderung

- Die Destination Alpsee-Grünten kann als mehr oder weniger „ausgeplant“ betrachtet werden. Ausgehend von den naturräumlich starken Einschränkungen (u.a. Topographie, geologische Ausgangsbedingungen, Hochwasserschutz) werden die verbleibenden nutzbaren Flächen von einer Reihe sich teilweise überlagernder Nutzungen wie Wohnen, Gewerbe, Landwirtschaft, Versorgung/Infrastruktur, Verkehr sowie Erholung/Tourismus in Anspruch genommen.
- Letztlich sind auf lange Sicht für eine Gewerbeflächenentwicklung kaum mehr Flächen vorhanden bzw. finden sich an keiner Stelle mehr optimale Verhältnisse. Dies spiegelt auch das derzeit geringe Gewerbeflächenangebot der Kommunen wider.
- Die Kommunen sind darauf angewiesen, in den wenigen für eine Gewerbeentwicklung überhaupt geeigneten Flächen entsprechende Flächensicherungen bzw. -ankäufe vornehmen zu können. Auf Grundlage der von Haus aus vergleichsweise hohen Bodenpreise schafft dies eine Drucksituation, die die Handlungsspielräume und die Verhandlungsbasis für die Kommunen deutlich erschwert.
- Auf Grundlage der Nachkalkulation von Gewerbegebieten sowie der Kalkulation zu den in Frage kommenden Gebieten zur Entwicklung (Immenstadt-Seifen, Konversion Sonthofen) zeigt sich, dass sich unter Berücksichtigung aller wesentlichen Kosten und Einnahmen die Gewerbeflächenentwicklung in der Region Alpsee-Grünten betriebswirtschaftlich für die Kommunen kaum „rechnet“. Neben den Grundstückspreisen spielen naturräumliche Rahmenbedingungen (Hochwasserschutz etc.) sowie deren Einfluss auf die Erschließung eine wichtige Rolle.
- Eine wie bisher angebotsorientierte Flächenvorhaltung durch die einzelnen Kommunen ist in Anbetracht unterschiedlicher Standortansprüche der Unternehmen mit einer geringeren Passgenauigkeit sowie daraus folgend mit einem höheren finanziellen Aufwand und Risiko verbunden. Wie auch Erkenntnisse in anderen Gebieten (z.B. interkommunale Gewerbegebiete im Unterallgäu, Stadtentwicklungsverband Ulm/Neu-Ulm) zeigen, ist eine gewerbliche Standortentwicklung immer weniger von der Quantität sondern wesentlich von der Qualität und Bedarfsorientierung des Flächenangebots abhängig.
- Unter Berücksichtigung der besonderen Rahmenbedingungen hinsichtlich der Lage im südlichen Oberallgäu stellt die Gewerbeflächenentwicklung in der Destination Alpsee-Grünten weniger eine Sicherung kommunaler Einnahmequellen als vielmehr eine notwendige kommunale Wirtschaftsförderung für die Sicherung von Betrieben und Arbeitsplätzen dar. Letzteres ist gerade mit Blick auf die demographischen Veränderungen eine Grundvoraussetzung, um auch junge Bevölkerung vor Ort halten und die bestehende Infrastruktur auch in Zukunft auslasten zu können.

## 2. Zielsetzung

### Ein gemeinsamer Wirtschaftsraum

- Die Destination Alpsee-Grünten zeichnet sich – auch unter Berücksichtigung der südlichen Nachbargemeinden – durch einen gemeinsamen Wirtschaftsraum mit vielfältigen Verflechtungen (Verkehr, Erholung/Tourismus, Verwaltung, Wirtschaft/Arbeitsmarkt, Versorgung etc.) aus. Betriebe und Bevölkerung bewegen sich in ihren Alltagsgewohnheiten über die kommunalen Verwaltungsgrenzen hinaus.
- Wie Beispiele aus der Vergangenheit belegen, ist die gewerbliche Ansiedlungspolitik in hohem Maße von Betriebsumsiedlungen innerhalb der Destination Alpsee-Grünten geprägt. Unter Berücksichtigung der erschwerten Rahmenbedingungen führt die Konkurrenzsituation auf engstem Raum auf mittlere und lange Sicht zu Nachteilen für die Kommunen (u.a. weniger optimale Standortbedingungen, Vorhaltekosten etc.).
- Der gemeinsame Wirtschaftsraum und die naturräumlichen Rahmenbedingungen legen eine verstärkte Arbeitsteilung zwischen den fünf Kommunen nahe. So bietet sich beispielsweise eine Arbeitsteilung zwischen den Konversionsflächen in Sonthofen (kleinteiligere Entwicklung hinsichtlich Handel, Dienstleistung, Handwerk, ggf. auch Technologie, Forschung und Entwicklung) sowie dem Gebiet Immenstadt-Seifen (großflächigere Entwicklung hinsichtlich Produktion und Logistik etc.) an.
- Ausgehend von einem gemeinsamen Wirtschaftsraum und kurzen Wegen zwischen den fünf Kommunen erscheint es nicht entscheidend, an welchem konkreten Ort ein Arbeitsplatzangebot bereit gestellt wird; entscheidend ist, dass das „regionale“ Arbeitsplatzangebot für die Destination Alpsee-Grünten gesichert und entwickelt wird.
- Durch die stärkere Zusammenarbeit der Kommunen unter dem Dach eines gemeinsamen Wirtschaftsraumes ergeben sich Möglichkeiten zur Bündelung von Finanz- und Verwaltungskräften sowie davon ausgehend mittel- bis langfristig auch die Möglichkeit zur stärkeren Nutzung der betrieblichen Potenziale (Stärkung betrieblicher Wertschöpfungsketten etc.).
- Wie das Beispiel Ulm/Neu-Ulm zeigt, kann ein gemeinsamer Wirtschaftsraum und dessen offensive Präsentation nach außen zu einer Imagestärkung der Kommunen beitragen. Wenn diese geschlossen nach außen auftreten, macht dies den Raum mittel- bis langfristig auch für Investoren von innen und außen attraktiv.



### 3. Strategie:

#### Gemeinsames, effizientes Gewerbeflächenmanagement

- Das Flächenmanagement für die Region Alpsee-Grünten soll eine zielgenaue, bedarfsorientierte Gewerbeflächenentwicklung ermöglichen und Flächenengpässe bzw. -überhänge vermeiden. Flächenengpässe führen zu Nachteilen für die jeweilige Entwicklung der Betriebe, während Überangebote eine Belastung für die kommunalen Finanzen darstellen.
- Es ist davon auszugehen, dass sich die Nachfrage in hohem Maße innerhalb der Region abspielt. Gerade diese Voraussetzung erfordert eine sehr gezielte Abstimmung von Angebot und Nachfrage zwischen den Kommunen, um eine unnötige Konkurrenzsituation sowie Fehlentwicklungen bezüglich der Standortwahl oder die Schaffung von Überangeboten mit allen damit verbundenen Nachteilen zu vermeiden. Die gemeinsame Vorhaltung kurzfristig verfügbarer Flächen mittels eines gemeinsamen Gewerbeflächenmanagements bietet eine höhere Passgenauigkeit und Effizienz.
- Aufgrund der Rahmenbedingungen ist das gemeinsame Gewerbeflächenmanagement in besonderer Weise auf eine Bedarfs- und Qualitätsorientierung ausgerichtet. Das gemeinsame Angebot wäre vielfältig und könnte flexibel auf die Nachfrage der Unternehmen reagieren. Den Betrieben mit ihren unterschiedlichen Ansprüchen können optimale Rahmenbedingungen und insbesondere geeignete Standorte zur Verfügung gestellt werden (z.B. für Logistiker eine gute Verkehrsanbindung). Die Verbesserung und Optimierung von Ansiedlungsbedingungen im Zuge einer höheren Standortvarianz und eines flexibleren Standortangebots tragen unmittelbar zur Sicherstellung von Arbeitsplätzen bei. Ebenso können städtebauliche, landschafts- und erholungsbezogene Qualitäten umfassender berücksichtigt werden.
- Ein nachhaltig angelegtes, gemeinsames Gewerbeflächenmanagement setzt voraus, dass im Rahmen der Satzung und Umsetzung klare Verbindlichkeiten und Regelungen zur Kosten- und Einnahmenteilung sowie zur Bauleitplanung zugrunde gelegt werden.

## Industrial and business park Unterallgäu

|                            |                                                                                                                                                                                            |                       |            |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------|
| <b>Metadata / Contact:</b> | Stefan v. Andrian-Werburg<br><br>Bosch & Partner GmbH, Josephspitalstraße 7, D-80331 München<br><br>Andreas Raab<br><br>Regional- und Stadtplaner (SRL), Spiegelstraße 2a, D-81241 München | <b>Date of entry:</b> | 15.01.2010 |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------|

### I Description / general information on the region

As a basis for comparing the preconditions for implementing the instrument and for transferring solutions

|                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name of region / project</b> | Industrial and business park Unterallgäu<br>Several municipalities in the district of Unterallgäu                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Reference</b>                | Industrie- und Gewerbepark Unterallgäu<br>Maximilianstraße 26<br>87719 Mindelheim<br><br>Contact:<br><br>Ronny Herold<br>Tel.: 0 82 61 / 99 15-40<br><a href="mailto:info@gewerbepark-unterallgaeu.de">info@gewerbepark-unterallgaeu.de</a><br><a href="http://www.gewerbepark-unterallgaeu.de/">www.gewerbepark-unterallgaeu.de/</a>                                                                                                                                                                                                                                                                                                                                             |
| <b>Size</b>                     | Number of municipalities: 5<br><br>City of Mindelheim, municipalities Apfeltrach, Kammlach, Stetten and Unteregg (District Unterallgäu / Government District Schwaben)<br><br>Total population of the region: 19.635<br><br>Population of the different municipalities: Apfeltrach: 962, Kammlach: 1.768, Mindelheim: 14.135, Stetten: 1.353, Unteregg: 1.417<br><br>Total area of the region: 137,6 km <sup>2</sup><br><br>Area of the single municipalities / communities of municipalities included: Apfeltrach: 15,03 km <sup>2</sup> , Kammlach: 26,73 km <sup>2</sup> , Mindelheim: 56,44 km <sup>2</sup> , Stetten: 15,71 km <sup>2</sup> , Unteregg: 23,7 km <sup>2</sup> |
| <b>Structure</b>                | The city of Mindelheim is of importance for the surrounding municipalities concerning several functions, for instance: administration of the district, location of secondary schools, shopping location, importance as place of work, medical services                                                                                                                                                                                                                                                                                                                                                                                                                            |

### II Strategy / Process

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| <b>Name of strategy / instrument</b> | Inter-municipal industrial and business park                                                              |
| <b>Activities</b>                    | Joint preparation and financing concerning planning and development of an inter-municipal commercial area |

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| <b>Objectives / focus / motivation</b>             | <p>According to information from Mr. Herold, the development of the inter-municipal industrial and business park primarily aims at the acquisition of new enterprises, but also at allowing the resettlement of enterprises having a higher demand for land. The main target group is businesses of the manufacturing sector.</p> <ul style="list-style-type: none"> <li>- Safeguarding and creating of jobs in the region</li> <li>- Safeguarding of municipal financial options</li> <li>- Limitation of land use.</li> </ul> |
| <b>Process / "history"</b>                         | <p>The development was originally initiated by a discussion in the context of a study on the overall regional concept of the district Unterallgäu. This discussion also included the topic of inter-municipal cooperation to a remarkable extent.</p> <p>The preparation of the development started in 2001.</p>                                                                                                                                                                                                                |
| <b>Outcomes / achievements</b>                     | <p>Foundation of a special purpose association (Zweckverband), enactment of the association articles (Zweckverbandsatzung) in 2003;<br/>First provision of land ready for development in 2005;<br/>First commitment of settlement of an enterprise in 2008;</p>                                                                                                                                                                                                                                                                 |
| <b>External financial / administrative support</b> | <p>The initiation of the process was supported by the administration for rural development, which took a share of the planning costs of the development.</p>                                                                                                                                                                                                                                                                                                                                                                    |

### III Implementation

In this section it shall be described in detail and comprehensible for the "outsider", how the strategy is implemented, how the cooperation or the commercial development work, which instruments are used, how responsibilities are shared etc..

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| <b>Organization and financing</b>       | <p>As organizational structure of the inter-municipal business park, the municipalities founded a special purpose association named "Industrie- und Gewerbepark Unterallgäu" according to the Bavarian law on municipal cooperation (KommZG). The special purpose association is presided by a mayor of one of the participating communities.</p> <p>The municipalities are represented in the association's assembly, which takes the decisions concerning the association, by members of the local councils (city of Mindelheim, municipalities).</p> <p>The management of the special purpose association is taken by a collaborator of one participating municipality. The special purpose association itself does not possess own personnel with dedicated working time resources.</p> <p>The budget of the association is primarily used for the planning and development of the land. The financing bases on an allocation of financial means between the municipalities according to their area and resident population: Mindelheim 40%, Kammlach und Stetten 20% each, Apfeltrach 13%, Unteregg 7%;</p> |
| <b>Spatial planning and soil policy</b> | <p>The total area of the inter-municipal business park comprises 75 ha, which are partly accounted for in the municipal land use plan and partly included in an informal framework plan;</p> <p>In the first construction stage, 15 ha were developed (formal development plan, outline planning concerning the development structure); The development was partly determined by a state road, further development (sewage, water, development roads) were planned following the commitment of settlement of the first enterprise.</p> <p>The purchase of the land concentrated on the land for the first construction stage particularly as well as on the land covered by the land use plan; it was carried out by the special purpose association</p> <p>The development of the land shall remain open as far as possible to be able to flexibly react on the demand of investors and enterprises.</p>                                                                                                                                                                                                        |

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|                                                                       | The development of the land was only partly concerted with the existing provision of land (additional offer). The decision on the location was made with respect to the direct connection to the motorway and the hitherto agricultural use of the area, which is not related to existing settlement structures (Greenfield strategy). |
| <b>Identification of supply and demand for commercial development</b> | The strategy of the inter-municipal business park is mostly oriented to the supply side. I.e., the preparation of the land is carried out without an analysis of regional requirements and demands.                                                                                                                                    |
| <b>Marketing</b>                                                      | The marketing is limited to the use of a common web-based platform and the joint use of the Bavarian portal on commercial property (Sisby). There are no personnel or financial resources for any additional marketing activities.                                                                                                     |
| <b>Other instruments / methods</b>                                    | No implementation of further activities or methods.                                                                                                                                                                                                                                                                                    |

#### IV Review

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| <b>Success</b>                | The success of the development can only partly be estimated for the time being: <ul style="list-style-type: none"> <li>- The settlement of the first enterprise partly refinanced the financial expenditures and set a first positive impulse.</li> <li>- The success concerning the objectives of safeguarding jobs and municipal development options as well as of limiting space consumption cannot be estimated yet.</li> </ul> |
| <b>Difficulties</b>           | The strategy is laid out rather inflexible. The supply of land is concentrated on only one location. The lack of finances and personnel results in a lack of marketing activities and a lack of options for actions. The success mainly depends on demand and incidental requests from the outside.                                                                                                                                 |
| <b>Balancing of interests</b> | A scheme for balancing interests with respect to balancing risks, burdens and revenues has been implemented by the enactment of the association articles.<br><br>A balancing of interests concerning other marketing activities of commercial area was not included.                                                                                                                                                                |
| <b>Commitment</b>             | Although most of the municipalities are still committed to the inter-municipal business park, single municipalities tend to withdraw their activities as they do not see sufficient benefit concerning their objectives.                                                                                                                                                                                                            |

## Association on business purposes Economic Area Nürtingen

|                            |                                                                                                                                                                                                        |                       |            |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------|
| <b>Metadata / Contact:</b> | Michael Weber, Institut für Stadt- und Regionalentwicklung (IfSR) an der Hochschule Nürtingen-Geislingen<br><br>Stefan v. Andrian-Werburg, Bosch & Partner GmbH, Josephspitalstraße 7, D-80331 München | <b>Date of entry:</b> | 20.02.2010 |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------|

### I Description / general information on the region

As a basis for comparing the preconditions for implementing the instrument and for transferring solutions

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| <b>Name of region / project</b> | Association on business purposes Economic Area Nürtingen<br>Gewerbebezweckverband Wirtschaftsraum Nürtingen                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Reference</b>                | Monika Lauer, Stadt Nürtingen, Marktstraße 7, 72622 Nürtingen, Tel. 07022/75-295, wifoe.stadt@nuertingen.de, www.wirtschaftsraum-nuertingen.de                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Size</b>                     | Number of municipalities: 9<br><br>Total population of the region: approx. 80.000<br><br>Population of the single municipalities:<br>Beuren 3.372, Frickenhausen 8.780, Großbettlingen 4.123, Kohlberg 2.275, Neuffen 6.183, Nürtingen 40.274, Oberboihingen 5.408, Unterensingen 4.611, Wolfschlügen 6.285<br><br>Area: 117 km <sup>2</sup><br><br>Area of the single municipalities / communities of municipalities included:<br>Beuren 11,69 km <sup>2</sup> , Frickenhausen 11,35 km <sup>2</sup> , Großbettlingen 4,23 km <sup>2</sup> , Kohlberg 4,39 km <sup>2</sup> , Neuffen 17,45 km <sup>2</sup> , Nürtingen 46,9 km <sup>2</sup> , Oberboihingen 6,31 km <sup>2</sup> , Unterensingen 7,56 km <sup>2</sup> , Wolfschlügen 7,12 km <sup>2</sup> |
| <b>Structure</b>                | Nürtingen as the regional centre and the surrounding, partly rural municipalities form a joint economic area with close interlinkages. Nürtingen fulfils the functions of the regional centre concerning administration, health, education (Fachhochschule), and as labour market centre.<br><br>Administrative structures: Landkreis Esslingen, Bundesland Baden-Württemberg                                                                                                                                                                                                                                                                                                                                                                              |

### II Strategy / Process

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| <b>Name of strategy / instrument</b>   | Inter-municipal commercial areas                                                                                                                                                                                                                                                      |
| <b>Activities</b>                      | Joint planning, development and marketing of two commercial areas:<br>Business park Bachhalde (focus on services), approx. 10 ha, good connection to motorway<br>Industrial and commercial area Großer Forst, approx. 40 ha                                                           |
| <b>Objectives / focus / motivation</b> | Creation of sustainable conditions for the regional economy in order to safeguard and create jobs.<br><br>Preparation of large and coherent areas for commerce, industry and services at locations with good accessibility, which are suitable with respect to environment protection |

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|                                                    | and which help to avoid the development of unsuitable dispersed areas.                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Process / "history"</b>                         | The starting point of the joint actions and developments were topographic restrictions and regional planning specifications. The special purpose association was founded in 2003.                                                                                                                                                                                                                                                                              |
| <b>Outcomes / achievements</b>                     | <p>The Business Park Bachhalde has been developed in the meantime. Approx. 40% of the area has been sold. Approx. 15 small and medium sized enterprises could be settled.</p> <p>Concerning the industrial and commercial area Großer Forst, a development plan (Bebauungsplan) was set up in 2008.</p> <p>The designation and development of commercial areas in the different municipalities of the association could be lowered to a remarkable extent.</p> |
| <b>External financial / administrative support</b> | Continuous financial aid by the regional planning association Stuttgart (Zinszuschüsse)                                                                                                                                                                                                                                                                                                                                                                        |

### III Implementation

In this section it shall be described in detail and comprehensible for the "outsider", how the strategy is implemented, how the cooperation or the commercial development work, which instruments are used, how responsibilities are shared etc..

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| <b>Organization and financing</b>                                     | <p>The municipalities are organized in the form of a special purpose association. Communication, coordination and management are regulated in the constitution of the association.</p> <p>Decisions are taken in the association assembly, which consists of the mayors of the participating municipalities. The assembly meets on demand but at least once a year.</p> <p>The members of the association participate in the association corresponding to the size of their resident population. In case the expenses of the association are not covered by revenues or grants, they are financed by means of an allocation. The amount of the allocation is preliminary fixed for each budget period (year) within the budget articles, differentiated in the administrative budget (allocation of administrative and operational costs) and the asset budget (capital allocation).</p> |
| <b>Spatial planning and soil policy</b>                               | <p>Both areas are located within the boundaries of the city of Nürtingen, which holds the complete planning authority for the areas and which is also the authority concerning building law.</p> <p>The city of Nürtingen set up development plans (Bebauungspläne) for both areas.</p> <p>The special purpose association takes the responsibility for planning, developing and marketing the commercial areas. The management board of the association is taken by the business development department of the city of Nürtingen.</p>                                                                                                                                                                                                                                                                                                                                                   |
| <b>Identification of supply and demand for commercial development</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Marketing</b>                                                      | For the marketing of the areas, the following tools are used: direct contacts to entrepreneurs, business fora, Location-Communication-System of the Region Stuttgart (Standort-Kommunikations-System), internet, mailings concerning target groups, advertisements, and participation at trade fairs as for instance the Expo Real in Munich.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Other instruments /</b>                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

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| methods |  |
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#### IV Review and lessons learned

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| <b>Success</b>                | The organizational framework is regarded as suitable by the participating municipalities.<br>The sale and rent of the areas progressed rather slowly. The main reasons are seen in a general reluctance concerning the demand for commercial areas as well as in the hillside the situation of the area "Bachhalde". |
| <b>Difficulties</b>           | Originally, members of the local councils were also part of the association assembly additionally to the mayors, resulting in high organizational and coordination efforts. Since 2008 the association assembly is reduced to the mayors of the participating municipalities.                                        |
| <b>Balancing of interests</b> | From the point of view of the municipalities, there is no need for changing the system of balancing the interests.                                                                                                                                                                                                   |
| <b>Commitment</b>             | The meetings of the association assembly are public, with reports on the meetings by the local press. The association Region Stuttgart is consulting member of the association assembly.                                                                                                                             |

## 2nd Industrial Macro Lot Prato

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|----------------------------|-------------------------------------------------------------------------|-----------------------|------------|
| <b>Metadata / Contact:</b> | Maria Crea<br>Local Development Agency LAMORO<br>Via Leopardi, 4 - Asti | <b>Date of entry:</b> | 12.03.2009 |
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### I Description / general information on the region

As a basis for comparing the preconditions for implementing the instrument and for transferring solutions

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| <b>Name of region / project</b> | 2 <sup>nd</sup> Industrial Macro Lot Prato                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Reference</b>                | <a href="http://www.macrolotto2.com/main.htm">http://www.macrolotto2.com/main.htm</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Size</b>                     | Number of municipalities: 5<br>City of Prato, Campi Bisenzio, Sesto Fiorentino – Osmannoro and Florence<br>Total population of the region: 1.078.443<br>Population of the single municipalities (do the municipalities differ strongly in size?)<br>Prato: 227.886; Florence: 933.860; Campi Bisenzio: 37.249; Sesto Fiorentino: 46.054.<br>Area [km <sup>2</sup> ]: 2.400                                                                                                                                                                                                                                                                                                                                                         |
| <b>Structure</b>                | The project involves 2 Provinces (Prato and Florence) and it will be situated in the centre of gravity of 3 important Metropolitan Areas (Florence-Prato-Pistoia). The two main municipalities are Prato and Florence, which are interested only in the industrial areas, and there are two small municipalities (Campi Bisenzio and Sesto Fiorentino – Osmannoro). The main municipality involved in the project – Prato – is of great importance for the surrounding municipalities even though the presence of Florence which is the capital of the region. In Prato there is the administration of the Macro Lot, location of school at all levels, productive and commercial location, medical and social services and so on. |

### II Strategy / Process

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| <b>Name of strategy / instrument</b>   | Inter municipal Industrial Macro Lot 2                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Activities</b>                      | Identify and share innovative services that can ensure economic development and a maximum respect for the environment at the same time.<br><br>The 2 <sup>nd</sup> Industrial Macro Lot does not concern only industry. Fifteen hectares are reserved for settlement services for businesses and for people: advanced services, shopping centres, office districts, banks, community centres. Moreover in the area a park of 30 hectares will be established as a green "lung".                      |
| <b>Objectives / focus / motivation</b> | The main objectives of these Industrial Areas are: <ul style="list-style-type: none"> <li>• reduce the general social and environmental impact on the area;</li> <li>• involve also small and micro enterprises in programs for the social and environmental development of the whole area with the perspective of concrete savings;</li> <li>• represent a useful aid to policies for the conversion of the textile industry and to aid the diversification in other productive sectors;</li> </ul> |



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|                                                    | <ul style="list-style-type: none"> <li>modernize and strengthen the productive structure of Prato</li> </ul>                                                                                                                                                                                                                         |
| <b>Process / "history"</b>                         | The current process started in 1990 with the stipulation of act n.351 of 12/03/1990. With this act the City Council has approved the allotment of "Industrial Macro Lot 2 of Prato" in order to create an environmentally sustainable industrial district. The initiation of the process was supported by the Municipality of Prato. |
| <b>Outcomes / achievements</b>                     | Modernize and strengthen the productive structure of the municipalities involved paving the way of an inter-municipal cooperation and increasing industrial efficiency and quality and reduce costs.                                                                                                                                 |
| <b>External financial / administrative support</b> | The initiation of the process, supported by the Municipality of Prato, had the administrative and operational support of the Cooperative Consortium CONSER created <i>ad hoc</i> for the implementation of the district.                                                                                                             |

### III Implementation

In this section it shall be described in detail and comprehensible for the "outsider", how the strategy is implemented, how the cooperation or the commercial development work, which instruments are used, how responsibilities are shared etc..

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| <b>Organization and financing</b>                                     | <p>The task of responsibilities is allocated to the Municipality of Prato.</p> <p>According to the Agreement between the Municipality of Prato and private parties united in the Cooperative Consortium CONSER, the following tasks are in the responsibility of the Municipality of Prato:</p> <ul style="list-style-type: none"> <li>the spoils system</li> <li>the preparation of the area with buildings, structures and public works</li> <li>the planning and directing of the Macro Lot 2</li> <li>the acquisition of private property to be annexed to the project.</li> </ul> <p>All charges, instead, are up to the private parties which are obliged to join together in CONSER.</p> <p>The Cooperative Consortium CONSER is in charge for the organization of the following services:</p> <ul style="list-style-type: none"> <li>Water management</li> <li>Mobility management</li> <li>Security management</li> <li>Time management</li> <li>Training course organization</li> <li>Environmental protection activities</li> </ul> |
| <b>Spatial planning and soil policy</b>                               | The spatial planning of the 2 <sup>nd</sup> Industrial Macro lot derived from Regional Law 22 December 2003 No 61 on Ecologically equipped productive areas. The Regional Law regulated and defined in advance rules for building types, planimetries, fences, etc. to give the area an image of order and quality.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Identification of supply and demand for commercial development</b> | During the phase of design of the Macro Lot 2 the special needs of the entrepreneurs, in terms of demand of commercial development, have been investigated through special questionnaires and collected in a SWOT analyses. The Macro Lot 2, taking into account this study, has been established in order to create an industrial district which is also environmentally sustainable.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Marketing</b>                                                      | The territorial marketing strategies have been developed by the Municipality of Prato to publicize the potential economies of scale that can be obtained in an environmentally and socially equipped production area to kick off the reservation by entrepreneurs who                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

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|                                    | want to set up their business there. This point is very important as regards the possibility of attracting sponsors for the Macro Lot.                                                                                                                                                                                                                                                                                                                        |
| <b>Other instruments / methods</b> | <p>Additional Instruments for the realization of the Sustainable Industrial Macro Lot 2 are:</p> <ul style="list-style-type: none"> <li>• Environmental, economic and social assessment</li> <li>• Defining the infrastructure requirements of environmental protection, protection of safety and health of workers, economic development and social ethics</li> <li>• Definition of monitoring of environmental, economic and social performances</li> </ul> |

#### IV Review and lessons learned

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| <b>Success</b>                | The Macro Lot 2 derived from two other similar experiences, but it possesses more strengths than the previous ones. First of all, this Macro Lot is the result of the involvement of the municipalities of the area around the Municipality of Prato. Moreover, in this project agreements and conventions for the division of costs and financial planning of the area have been provided between public and private actors. Also, compared to other ecologically equipped areas, the Macro Lot 2 presents a number of infrastructure assets for boosting and sustainability of the project: a water manager, a mobility manager, manage waste, a time manager, a security manager, and finally an energy manager. |
| <b>Difficulties</b>           | Concerning the balancing of responsibilities between public and private bodies it is still embryonic; in fact almost all the responsibilities are in charge of the Municipality of Prato.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Balancing of interests</b> | The actual system of balancing of interests between public and private bodies works with respect to balancing risks, burdens and revenues.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Commitment</b>             | CONSER is committed to the Macro LOT 2 according with the consortium document. Moreover all the entrepreneurs involved in the design phase and all the municipalities territorially interested by the LOT are committed to propose development projects in the area.                                                                                                                                                                                                                                                                                                                                                                                                                                                |

## PTI Canavese Business Park

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| <b>Metadata / Contact:</b> | Maria Crea<br>Local Development Agency LAMORO<br>Via Leopardi, 4 - Asti | <b>Date of entry:</b> | 18.03.2010 |
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### I Description / general information on the region

As a basis for comparing the preconditions for implementing the instrument and for transferring solutions

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| <b>Name of region / project</b> | PTI Canavese Business Park                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Reference</b>                | Municipality of Ivrea<br>Piazza Vittorio Emanuele, 1<br>10015 IVREA (TO) Italy<br>www.comune.ivrea.it                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Size</b>                     | Number of municipalities: 31<br>Total population of the region: 93.502<br><br>Population of the single municipalities (do the municipalities differ strongly in size?)<br>Agliè: 2631, Albiano D'Ivrea: 1706, Barbania: 1557, Bollengo: 2028, Borgomasino: 826, Busano: 1437, Caluso: 7342, Candia Canavese: 1302, Caravino: 1023, Colleretto Giacosa: 615, Cossano Canavese: 544, Favria: 4779, Fiorano Canavese: 895, Foglizzo: 2223, Front: 1665, Lessolo: 1982, Lombardore: 159, Loranze: 1043, Maglione: 493, Montalto Dora: 3399, Quagliuzzo: 321, Rivarolo Canavese: 12003, Rivarossa: 1504, Rondissone: 1712, San Giorgio Canavese: 2487, San Giusto Canavese: 3174, Settimo Rottaro: 508, Strambino: 6146, Vauda Canavese: 1509, Vestignè: 869<br>Total area of the region: 2.047,61 km <sup>2</sup> |
| <b>Structure</b>                | The project involves 31 municipalities, in which territories are located 3 business district composed on poles of excellence and industrial settlements.<br><br>The main municipality involved in the project which is Ivrea, is of great importance for the surrounding municipalities in terms of type of central services offered to the Canavese territory (education services, schools, health services, administrative services, etc.) and in the region, which has chosen Ivrea as the capital of the "Canavese Business Park" within the PTI of the region.                                                                                                                                                                                                                                           |

### II Strategy / Process

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| <b>Name of strategy / instrument</b> | PTI (Integrated Territorial Programme) Business Park<br><br>The PTI is a concrete tool to implement Regional Operational Programme for the planning of structural funds to reach innovative forms of effectiveness and consultation. Obtaining the funds is a subject to the award of tender managed by a Regional Authority.                            |
| <b>Activities</b>                    | The following actions are aimed at: <ul style="list-style-type: none"> <li>• Supporting the territorial richness towards innovation.</li> <li>• Organizing procedures towards creating a meta-district as part of the multi-sector-district.</li> <li>• Building a more attractive area for businesses and individuals through territory ame-</li> </ul> |

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|                                        | <p>lioration and valorization.</p> <ul style="list-style-type: none"> <li>• Promoting practices of better project management and development of the industrial area from an environmental and social point of view with the aim of increasing the quality of work-places.</li> <li>• Promoting sustainable energy practice (beginning with the test case of the Energy Centre of the APEA (Areas of Ecologically-sound Production).</li> <li>• Promoting financing which supports new entrepreneurial projects (small business loans, etc.)</li> <li>• Highlighting the value of the area's human resources.</li> <li>• Promoting a business culture which is based on equal opportunities and social responsibility.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Objectives / focus / motivation</b> | <p>The goal of the Canavese Business Park is to valorize those business projects which will be able to effectively combine both the promotion of the inter-municipal development processes and the support of well-established industrial sectors (heavy industry, press-forging), together with the integration of new industrial processes (biotechnology, nanotechnology, IT sector, electronic and mechanotronic industry, entertainment sector).</p> <p>For the Canavese area, the multi-sector district is an innovative model of inter-municipal development; its goal is to be aware and conscious of the territory's history and identity and to develop the potentialities of the Canavese by strengthening the ties between well established and recent sectors.</p> <p>The main objectives are:</p> <ul style="list-style-type: none"> <li>• The re-valorization and diversification of the entrepreneurial system</li> <li>• The creation of new and better employment.</li> <li>• Support for innovation.</li> <li>• Consolidating the web of collaboration between business and research institutions.</li> <li>• Generational change in business.</li> <li>• Excellence nurturing to limit "brain drain".</li> </ul> |
| <b>Process / "history"</b>             | <p>The guideline under which the PTI "Canavese Business Park" was born in 2006 is summarised by the concept of "multi-vocational district", which is the unmatched strength of the Canavese area. Multi-vocational district means that the Business Park is composed by poles of excellence and industrial processes, combines different sectors, and is located across three different locations (West, East and Center Canavese). This multi-vocational district will be for the Canavese area an innovative model of business development located in the same territory in which was born Olivetti Industry, one of the main Italian industrial models, leaving an inheritance of vocation towards innovation still present today. The goal of the Canavese Business Park is to valorize those business projects which will be able to effectively combine both the promotion of the inter-municipal development processes and the support of well-established industrial sectors (heavy industry, press-forging), together with the integration of new industrial processes (biotechnology, nanotechnology, IT sector, electronic and mechanotronic industry, entertainment sector).</p>                                         |
| <b>Outcomes / achievements</b>         | <p>In 2006, the Municipalities involved founded a special association according with the Piedmont law on municipal cooperation.</p> <p>Specific actions have been implemented in order to apply for public and private funding.</p> <p>Thanks to private investment, the area of West Canavese was interested by the transfer of undertakings in the press-forging productive pole of Busano-Favria (first lot).</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

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|                                                    | In the area of the Central and West Canavese, instead the public resource have been used to public works infrastructure related to POLO PA and related to new business initiatives funded on the Strategic Plan of the Canavese area. |
| <b>External financial / administrative support</b> | The process started with the support of the Piedmont Region through a co-financing on the overall budget estimated for the activities implementation as a share of the planning costs of the development.                             |

### III Implementation

In this section it shall be described in detail and comprehensible for the “outsider”, how the strategy is implemented, how the cooperation or the commercial development work, which instruments are used, how responsibilities are shared etc..

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|--------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Organization and financing</b>          | <p>In 2006, the Municipalities involved founded a special association according with the Piedmont law on municipal cooperation. The association involves also the private bodies located in the Business Park area included in the decision making.</p> <p>The rule of the Association is to both propose initiatives to enhance the level of organization and usability of the Canavese area and to collect the proposals of investment coming from the private investors included in the decision making</p> <p>The association's management is taken by collaborators of all participating municipalities involved but the association itself does not possess own personnel with dedicated working time resource.</p> <p>The budget of the PTI Canavese Business Park is used to implement several projects of business development in the area and is composed for a 10,09% of local public resources (divided among the municipalities involved), for a 27,62% of Piedmont Region resources and for a 62,09% of private investments.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Spatial planning and soil policy</b>    | <p>Responsible of planning and realizing the development of the activities linked with the Park is the Municipality of Ivrea in the framework of the Canavese Strategic land use Plan, a free will common strategic document set up in 2005 by all the municipalities of the Canavese area under the direction of the Province of Turin (the public body responsible for the validation of the Plan) that defines in advance rules for improving the area both in terms of social and business development.</p> <p>The total area of inter-municipal business park comprises 3 main business districts:</p> <ul style="list-style-type: none"> <li>• In the <u>West Canavese</u> are situated the mechanics pole and that of press-forging, well established sectors.</li> <li>• In the <u>Central Canavese</u>, the pole of electronics and mechanics-electronics, which has its base around the city of Ivrea, has also experienced the same industrial change. However, when one focuses on the innovative aspects of industry, one finds several enterprises which engage in the development of bio- and nano-technological platforms, which are represented by the Bioindustry Park; as well as enterprises which produce innovative platforms for public administration and local government (POLO PA) which will have its base in the town of Loranze.</li> <li>• On an axis which crosses the <u>South Canavese</u> towards the West, there is a new area which is developing a pole of the entertainment sector, in particular in the zone around “Telecittà” – a company that produces programs in many media; and of Millennium Park, an initiative geared towards creating new forms of entertainment for consumers.</li> </ul> |
| <b>Identification of supply and demand</b> | During the phase of design of the Business Park the special needs of the territory, in terms of supply and demand of commercial development, have been investigated                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

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| <b>for commercial development</b>  | through special questionnaires, addressed to the land's stakeholders, acting to collect proposals for action, services and activities belonging to the guidelines of PTI and according to the above-mentioned Strategic Plan of the municipalities involved.                                                                                                                                                                                                                                                         |
| <b>Marketing</b>                   | There is no proper common marketing strategy and no personnel or financing resources for marketing activities. The tool used to spread information is the web-portal of the Municipality of Ivrea.                                                                                                                                                                                                                                                                                                                   |
| <b>Other instruments / methods</b> | In the field of the sustainable development, a collaborative study between the Province of Turin and the Ivrea Municipality was undertaken in order to define the guidelines for introducing in the Business Park the so-called APEA (Areas of Ecologically-sound Production), special areas which amplifies the concept of sustainable development by introducing the architectural amelioration of the industrial sites and a more profound understanding of the importance that a welcoming work environment has. |

#### IV Review and lessons learned

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|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Success</b>                | The success of the current business process can be estimated for the time being in terms of successful actions concerning: <ul style="list-style-type: none"> <li>• the support to the development motors chosen, with the aim of confronting in a sustainable manner the challenges of the transition of production and innovation;</li> <li>• the cross-sectorial interventions aimed at strengthening the webs of support for synergies of district specialization, innovation and the transition of production.</li> </ul> |
| <b>Difficulties</b>           | The main difficulties are connected with the external investments and resource attracting capacity linked with the marketing strategy adopted by every single municipality and carried out in a profitable way only by the Municipality of Ivrea.                                                                                                                                                                                                                                                                              |
| <b>Balancing of interests</b> | The actual system of balancing of interests between the municipalities involved works with respect to balancing risks and burdens according with the association articles. A sharing of revenues is not foreseen.                                                                                                                                                                                                                                                                                                              |
| <b>Commitment</b>             | All the municipalities are committed to the business park according with the association document. Moreover all the local social and economic actors involved in the design phase of the Business Park are committed to propose development projects in the Park's area.                                                                                                                                                                                                                                                       |

## Communautés de communes du Pays de Romans et communauté du Canton de Bourg de Péage

|                            |                                                                                                                                                                  |                       |         |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------|
| <b>Metadata / Contact:</b> | <b>Florine GONCET</b><br>CCI de Lyon - Délégation de Tarare<br>24 rue du docteur Guffon<br>69170 Tarare<br>+ 33 (0)4 72 40 82 37<br>goncet@lyon.cci.fr<br>FRANCE | <b>Date of entry:</b> | 02.2009 |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------|

### I Description / general information on the region

As a basis for comparing the preconditions for implementing the instrument and for transferring solutions

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|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name of region / project</b> | Communautés de communes du Pays de Romans et communauté du Canton de Bourg de Péage<br>Région : Rhône-Alpes<br>Département : Drôme                                                                                                                                                                                                            |
| <b>Reference</b>                | François MONTERRAT<br>General manager<br>Tel: 00 33 (0)4 75 70 87 52<br>Email : francois.monterrat@rb-expansion.org<br><a href="http://www.rbe.annuaire-eco.fr/fr/">http://www.rbe.annuaire-eco.fr/fr/</a>                                                                                                                                    |
| <b>Size</b>                     | <u>2 Communauté de Communes</u> : Pays de Roman (20 municipalities) + canton de Bourg de péage (15 municipalities).<br><u>Resident population</u> : 76500 (Pays de Roman : 49500 + Canton de Bourg de Péage : 27000)<br><u>Size of Pays de Roman</u> : 250 km <sup>2</sup><br><u>Size of Canton Bourg de Péage</u> : 273 km <sup>2</sup>      |
| <b>Structure</b>                | Roman and Bourg de Péage are adjacent and administrative center for their respective "Communauté de communes". The municipalities of both Communauté de Communes are main<br>A river, the Isère, separate both cities of Roman and Bourg de Péage.<br>This region of France is known for its specialties in shoes and leather industry/craft. |

### II Strategy / Process

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|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name of strategy / instrument</b> | Roman-Bourg de péage Expansion : RBE<br>Syndicat mixte à vocation économique : (Rough translation) Association of municipalities and Communauté de Communes for the economic development. |
|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|



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| <b>Activities</b>                                  | <p>Platform of economics services for SMEs (industry, services, retailers and craft activities) :</p> <p>Land use management</p> <ul style="list-style-type: none"> <li>• Commercial Location Development</li> </ul> <p>Welcome</p> <ul style="list-style-type: none"> <li>• Support for setting-up project</li> <li>• Support for the research of workforce and welcome of the workers.</li> <li>• Follow-up the enterprises after their setting up.</li> </ul> <p>Support the SME</p> <ul style="list-style-type: none"> <li>• Financial support for SME</li> <li>• Access to collective actions of promotion and training for SMEs</li> <li>• Support for the development of a business network.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Objectives / focus / motivation</b>             | <ul style="list-style-type: none"> <li>• Rebalancing and Diversification of the activities of the local economy</li> <li>• Maintaining and development of the local job market.</li> <li>• Revitalization of the area which suffer from the shoes industry crisis (2005)</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Process / “history”</b>                         | <p>The area is known for its specialties in the shoes industry in crisis for years.</p> <p><u>Till 2004</u>: Both cities, Roman and Bourg de Péage, are politically opposed, and were unable to cooperate.</p> <p><u>2004</u>: Municipal elections and « reconciliation » between municipalities. The will to create a metropolitan area (Communauté d’agglomération) was formulated. Till then, there were no such project, but some sharing of cost and interest on common actions.</p> <p><u>Autumn 2005</u>: The labour pool suffered a lot of the shoes and leather business crisis. The local stake holders introduce the possibility to launch a concerted economic policy.</p> <p><u>December 2005</u>: The Communauté de Communes of Roman, during a committee, approved the association of municipalities for economic development. (Syndicat mixte à vocation économique).</p> <p><u>February 2006</u>: Committee of the Communauté de Communes de Bourg de Péage which approved the status of the association.</p> <p><u>January to may 2006</u>: the municipal committees of each municipality of the ComCom of Roman approved the status of the association by a qualified majority.</p> <p><u>July 2006</u>: Both economic services join their competences to create RBE, an economic development agency. The teams moved in the same premises.</p> |
| <b>Outcomes / achievements</b>                     | <ul style="list-style-type: none"> <li>• First important achievement: There is no more “economic war” between both territories.</li> <li>• The municipalities are now able to answer endogenous demand in a qualitative way.</li> <li>• RBE manages 400 ha of commercial location of which 30 ha of rental facilities with a call option (“Bâtiments relais”).</li> <li>• Maintaining and development of the employment.</li> <li>• Formalization of a strategy and spatial planning for tourism and proximity services.</li> <li>• 150 ha in project either for creation or extension of business park (industrial and services).</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>External financial / administrative support</b> | <p>The “Prefet” (Local representative of the State) stepped in to stop the “economic war”.</p> <p>European funding (Feder) and from the state (Fisac: specific funding for retailers and craft businesses)</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

### III Implementation

In this section it shall be described in detail and comprehensible for the “outsider”, how the strategy is implemented, how the cooperation or the commercial development work, which instruments are used, how responsibilities



are shared etc..

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| <b>Organization and financing</b>                                     | <p>Election of a board of directors by and with elected representatives from each of the two territories (ComCom de Roman and Bourg de Péage).</p> <p>A general manager: Mr. Francis Monterrat</p> <p>A team of 11 people in charge of the welcome and the accompaniment of the businesses. Those people were part of the respective economic services of the two territories.</p> <p>Financing :</p> <ul style="list-style-type: none"> <li>• Sharing of the local business tax. Each municipality or communauté de communes collect the local business tax and redistribute it for the economic development among other actions as waste management...</li> <li>• External funding from the state, region and Europe.</li> </ul> |
| <b>Spatial planning and soil policy</b>                               | <ul style="list-style-type: none"> <li>• 400ha of land</li> <li>• 20ha available in short term</li> <li>• The spatial planning is part of the Urban Master Plans (SCOT) and the Urban commercial plan (SDUC)</li> <li>• RBE is now in charge of the spatial planning according to the various planning documents and the trends decided by the elected representatives.</li> </ul>                                                                                                                                                                                                                                                                                                                                                 |
| <b>Identification of supply and demand for commercial development</b> | <p>Qualitative and quantitative study for the rehabilitation and conversion of waste-land/brown fields and for the development of a center for services</p> <p>Qualitative: dialogue, meeting with business leaders and anticipation of the needs. 80% of the demands are endogenous.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Marketing</b>                                                      | <ul style="list-style-type: none"> <li>• Website</li> <li>• Participation in many conferences and seminars.</li> <li>• RBE is a good example of existing and sustainable practices. By talking about their example, RBE is also communicating about the projects, the available lands and the territories in general.</li> <li>• Businesses network.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Other instruments / methods</b>                                    | <p>RELATIO: it assists professional members of the Romans and Bourg de Péage district in seeking customers and suppliers. It provides detailed information on the companies, their activities, the number of employees, contact details; email addresses ..., and is updated on a permanent basis.</p>                                                                                                                                                                                                                                                                                                                                                                                                                             |

#### IV Review and lessons learned

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|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Success</b>                | <ul style="list-style-type: none"> <li>• Implementation of additional location for industry, craft and services.</li> <li>• Implementation of rental facilities with a call option ("bâtiments relais").</li> <li>• Qualitative answer for endogenous demand for location.</li> <li>• Creation (2009/2010) of a common tourism office to promote the area and lead a coherent tourism policy. Roman-Bourg de Péage is a public and commercial structure. The idea emerged du to the success of RBE and the gathering of both economic development services.</li> </ul> |
| <b>Difficulties</b>           | <p>There were political problem not du to the feasibility but because of "people problems"</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Balancing of interests</b> | <p>We could consider there is a good balance of interest, because there is no more "economic war". The sharing of the local business tax is equilibrated.</p> <p>The promotion of the area is equal for both territory, they develop common projects with sharing of cost and benefit.</p>                                                                                                                                                                                                                                                                             |
| <b>Commitment</b>             | <p>Strongly committed.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

## Nuovo Quartiere Cornaredo – Lugano

|                            |                                                                                    |                       |            |
|----------------------------|------------------------------------------------------------------------------------|-----------------------|------------|
| <b>Metadata / Contact:</b> | SEREC<br>François Parvex<br>Via Battaglini<br>CH-6939 Tesserete<br>parvex@serec.ch | <b>Date of entry:</b> | 12.03.2010 |
|----------------------------|------------------------------------------------------------------------------------|-----------------------|------------|

### I Description / general information on the region

As a basis for comparing the preconditions for implementing the instrument and for transferring solutions

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|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name of region / project</b> | NQC - Nuovo Quartiere Cornaredo – Lugano (Switzerland)<br>www.cornaredo.ch                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Reference</b>                | Stefano Wagner, Studi Associati SA, Via Zurigo 19, 6904 Lugano Ticino, Svizzera<br>www.sasa.ch                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Size</b>                     | Number of municipalities: 3<br>Total population of the region: 135'000<br>Population of the single municipalities (do the municipalities differ strongly in size?): Lugano: 60'000; Porza: 1'500 ; Canobbio: 1'900<br>Area [km²]: Total area of the region, where the example is located: 100 ha<br>Area of the single municipalities / communities of municipalities included: Lugano: 1170 ha; Porza: 159 ha ; Canobbio: 130 ha                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Structure</b>                | Lugano bears an urban character; Porza and Canobbio are periurban municipalities with residential characteristics. The Labour market function and other services (education, health) are mainly provided by the city of Lugano. There are large commercial and industrial zones around the city. So there are strong commuter relations directed to Lugano from the surrounding municipalities. Municipal services are provided in each municipality. The Cornaredo area includes a large amount of sports and leisure facilities including football, ice skating, cinema as well as public services like education.<br><br>The three municipalities belong to the district Lugano in the canton Ticino. The municipalities are part of the large agglomeration of Lugano where an overall district mobility plan is in force and an intermunicipal structure for the management of the Cornaredo zone (agency) will be put in exercise by 2011 (Agenzia NQC). The Cornaredo area is also part of the agglomeration where an overall district mobility plan is in force and a Regional Development Organization is being created, which will be responsible for the economic promotion, the mobility management as well as the territorial development and resources management. |

## II Strategy / Process

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| <b>Name of strategy / instrument</b>               | Inter-municipal multipurpose land use planning and commercial development strategy (positioning)?                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Activities</b>                                  | Multipurpose territorial reorganization, territorial and transport planning, reorganization of the mobility and transportation (park and ride, intermodal node).                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Objectives / focus / motivation</b>             | A new tunnel coming from the highway will transform the area into the main entrance point of the urban pole. The main aim is to develop urban agglomeration around strategic areas, served by modern transport infrastructure in order to avoid traffic in residential areas. In order to make the zone attractive for users and investors, production (services), leisure, fairs, lodging, public services (mobility) and nature shall be organized in a harmonious way. The concept has been focused on the main topic "quartiere di eventi" ("events' areal"). |
| <b>Process / "history"</b>                         | A regional mobility plan was designed. It was completed by a concept of territorial organization of the "Luganese" (COTAL) and then by a transport plan of the luganese agglomeration (PTA) where guidelines were given for the Cornaredo area.<br><br>The current process has started in 2004 on the base of the above mentioned documents.                                                                                                                                                                                                                      |
| <b>Outcomes / achievements</b>                     | The planning of the Cornaredo area has been based on following documents: Cantonal territorial development plan, regional and local transport plans.<br><br>The CLD is still in the planning phase. An international urban planning contest was done, which ended into a masterplan. The detailed land planning document, which includes an inter-municipal urban plan and management guidelines, is now in the validation phase. A private consulting company is coordinating the process, while a development agency will soon be put into function.            |
| <b>External financial / administrative support</b> | The planning has been done in close cooperation and with the support (administrative / financial) of the cantonal administration.                                                                                                                                                                                                                                                                                                                                                                                                                                 |

## III Implementation

In this section it shall be described in detail and comprehensible for the "outsider", how the strategy is implemented, how the cooperation or the commercial development work, which instruments are used, how responsibilities are shared etc..

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| <b>Organization and financing</b> | <p>Inter-municipal agreements on institutional basis have been made during planning phase (2004, 2006);<br/>"NQC Table" operates since 2005 with representatives of the 3 municipalities and the cantonal administration as joint planning co-ordination structure.</p> <p>An inter-municipal independent structure (still in the planning phase) for the management of Cornaredo development ("agency") will be put in exercise by the end of 2011 (Agenzia NQC). The new agency "Agenzia NQC" will work on a mandatory base ("mandato di prestazione") to realize the planned infrastructures in the area, estimated in about 50 mio. CHF, over the next 10 years.</p> <p>The "Agenzia NQC" will work on a 4-years plan with a global budget decided by the 3 legislative bodies of the Municipalities. The mandate will be renewed until Cornaredo development is achieved.</p> <p>The inter-municipal plan has defined a repartition key between the Municipalities based on territorial interests during building phase, while the operational phase will be managed by an overall tax accounting system of the area based on the same repartition key</p> |
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|                                                                       | (Municipalities in Switzerland collect taxes locally from inhabitants and companies).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Spatial planning and soil policy</b>                               | <p>The following planning documents were elaborated for the Cornaredo area: Cantonal territorial development plan, regional and local transport plans, international urban planning contest, masterplan, inter-municipal urban plan and management. As more than one municipality is concerned, the municipalities organized the elaboration of plans through inter-municipal cooperation.</p> <p>As usual in Switzerland, land planning happens at three levels: Confederation, cantons and municipalities. Urban plans are designed at each level and must be coordinated. The population must be informed about the planning and given the opportunity to participate. The federal government approves the cantonal plans, which then become compulsory for the federal authorities as well as the ones of the neighboring cantons. Municipalities are responsible of designing the detailed land use plan (affectation) they may do it alone or through inter-municipal cooperation for areas where more as one single municipality is concerned like the Cornaredo area.</p> <p>Masterplan, land use plan, agency, public-private-partnerships. Summary: existing sectoral and territorial plans at all three levels.</p> |
| <b>Identification of supply and demand for commercial development</b> | No activities carried out                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Marketing</b>                                                      | <p>External marketing: To be observed later.</p> <p>Internal marketing: During the planning period: <a href="http://www.cornaredo.ch">www.cornaredo.ch</a>, meetings with the land owners, public information and bottom-up participation procedure with citizens.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Other instruments / methods</b>                                    | None                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

#### IV Review

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|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Success</b>                | <p>A common understanding was created and good collaboration processes have been organized.</p> <p>"NQC Table", information and participation of the citizens and stakeholders. Neutral project management.</p> |
| <b>Difficulties</b>           |                                                                                                                                                                                                                 |
| <b>Balancing of interests</b> |                                                                                                                                                                                                                 |
| <b>Commitment</b>             |                                                                                                                                                                                                                 |

## Municipality Sulzberg

|                            |                                                                       |                       |            |
|----------------------------|-----------------------------------------------------------------------|-----------------------|------------|
| <b>Metadata / Contact:</b> | Regionalentwicklung Vorarlberg<br>Hof 19, 6861 Alberschwende, AUSTRIA | <b>Date of entry:</b> | 01.03.2010 |
|----------------------------|-----------------------------------------------------------------------|-----------------------|------------|

### I Description / general information on the region

As a basis for comparing the preconditions for implementing the instrument and for transferring solutions

|                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name of region / project</b> | Municipality Sulzberg                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Reference</b>                | Gemeinde Sulzberg, Dorf 1, 6934 Sulzberg<br>+43 5516 2213<br>gemeinde@sulzberg.at<br>http://www.sulzberg.at                                                                                                                                                                                                                                                                                                                               |
| <b>Size</b>                     | Number of municipalities: 1<br>Resident population: 1,800<br>Area [km <sup>2</sup> ]: 23                                                                                                                                                                                                                                                                                                                                                  |
| <b>Structure</b>                | Relatively small community in the rural area, located near the border with Germany, on a hill in the foothills of the Alps, also named Sulzberg; The village center is situated on the highest point and has a wonderful panoramic view. The village is therefore a popular beauty spot and touristy. In recent decades, jobs have declined in the village. Currently there are 29 farms and service facilities located in the community. |

### II Strategy / Process

|                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name of strategy / instrument</b>   | Project and Structural Cooperative Ltd. Sulzberg                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Activities</b>                      | The cooperative buys property and develops residential and commercial areas of operation. It buys objects and recycles them in the sense of a targeted development for the community. The organization operates land use-management and location-development and public relations.                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Objectives / focus / motivation</b> | For the community Sulzberg alone, the development of land (acquisition, development, exploration) is not affordable. In addition, the community leaders recognized that the political decision-making processes are too slow to provide better conditions (i.e. holdings) for their domestic industry and young entrepreneurs. For a site development it would also require a certain mobilisation and the development of a local image.                                                                                                                                                                                                                                                                                    |
| <b>Process / "history"</b>             | Due the community development process an economy initiative with an exemplary character was launched. The community Sulzberg forms with the local bank, Raiffeisen and a consultation body a cooperative that is actively engaged in land policy and commercial location development.<br><br>As part of a community economic development, the working group (municipality, economy, civil substitutes, experts) has developed a basic approach for a structured and efficient way to operate a commercial location development (2004). The model has been concluded by the municipality. The site development and management cooperative has begun to buy land, to develop spatial planning and to promote the development. |
| <b>Outcomes /</b>                      | The PSG (Project and Structural Cooperative Ltd.) was founded 2004. Commercial                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

|                                                    |                                                                                                                                                                                                                                                                                                                                                                                   |
|----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>achievements</b>                                | <p>areas were developed and companies established.</p> <p>To date, 6 ha of land were purchased and 3 private companies located. The community centre was built with public functions, a settlement area was reached and awarded for private-construction and a housing estate was developed.</p>                                                                                  |
| <b>External financial / administrative support</b> | <p>The consultant ISK has accompanied the process and is the advisory body in the operational management. The external organization performs some operations manager. The structure has no staff. The work is done by the participating.</p> <p>In the phase of designing a support came from the province of Vorarlberg. The reaction was funded by the co-operative itself.</p> |

### III Implementation

In this section it shall be described in detail and comprehensible for the “outsider”, how the strategy is implemented, how the cooperation or the commercial development work, which instruments are used, how responsibilities are shared etc..

|                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Organization and financing</b>                                     | <p>The PSG (Project and Structural Cooperative Ltd.) consists of one representative of the community, a consulting firm (professional organization) and a representative of the Raiffeisenbank.</p> <p>In the statutes the capital and the top right is enshrined equivalent. The community, the bank and the private consultancy firm are represented with one voice. In the top-vote, the community is in the minority but holds in the capital vote the majority. Both congregations require a simple majority voting.</p> <p>The organization provides value-enhancing measures, from which the organization is financed (buying and selling of land).</p> |
| <b>Spatial planning and soil policy</b>                               | <p>With the purchase of land professional planning will be done and good conditions for the settlement of companies established.</p> <p>In the first phase a spatial development and a general development concept will happen. The detailed planning is done only on demand that means with the company concerned.</p>                                                                                                                                                                                                                                                                                                                                        |
| <b>Identification of supply and demand for commercial development</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Marketing</b>                                                      | <p>Public relations, information of citizens</p> <p>Community news and public events provide insight into the activities of the organization with main focus on location management. It will be presented in the periodic information of the community and businesses that are not with the overall Confederation been in contact.</p>                                                                                                                                                                                                                                                                                                                         |
| <b>Other instruments / methods</b>                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

### IV Review

|                |                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Success</b> | <p>The success of the concept is right, and thus serves the community Sulzberg in Vorarlberg as a pilot example of a commercial site development.</p> <p>Through the activities in the past the cooperative was able to process sites professionally and open them for businesses. In a lean organization and on behalf of community policies commercial location development is carried out professionally.</p> |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                               | <p>Experience has shown that the newly developed and by the PSG offered services can perform commercial location development. Meanwhile it is known in the municipality that there is a company interested in buying land with spatial interests outside of political interference.</p> <p>Because of this professional preparation not only businesses were located but at the same time a homogeneous development in the community is obtained, which today is already visible. An important element for the community is also the development of residential areas. With this cooperative the new settlement strategy was possible to implement. Architecturally sophisticated projects will be built in beautiful areas and that ensures a high quality of living.</p> <p>Over a longer time the economic actors have complained about the lack of offered commercial space. Entrepreneurs from the municipality have settled outside the municipality. This also led to a certain pressure.</p> |
| <b>Difficulties</b>           | No serious, because of the community development process that took place with broad participation of the public, there was a broad commitment to this action.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Balancing of interests</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Commitment</b>             | The local council and the local bank are behind the concept after it was discussed at length and decided to implement it.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |



## Land readjustment and consolidation (Le remembrement parcellaire)

### I General Information

|                                                                                    |                                                                                                                                                                                                                                                                  |                               |
|------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| <b>Name of Instrument</b>                                                          | Le remembrement parcellaire (RP)                                                                                                                                                                                                                                 |                               |
| <b>Development / Distribution</b>                                                  | Canton du Valais, Département de l'économie, de l'énergie et du territoire, Service du développement territorial.                                                                                                                                                |                               |
| <b>Source</b>                                                                      | Département de l'Environnement et de l'Aménagement du territoire du Canton du Valais & Service de l'Aménagement du Territoire 1995: Les plans d'affectation spéciaux et autres instruments de l'aménagement du territoire. Guide pour les communes. Sion, 24 pp. |                               |
| <b>Purpose</b>                                                                     | Instrument available to municipalities to collect and share out again parcels that are buildable with difficulty because of their structure.                                                                                                                     |                               |
| <b>Field of activity</b><br><i>1: main purpose</i><br><i>2: secondary purposes</i> | 1                                                                                                                                                                                                                                                                | Land use management           |
|                                                                                    | 2                                                                                                                                                                                                                                                                | Promotion and Communication   |
|                                                                                    |                                                                                                                                                                                                                                                                  | Business support and services |
|                                                                                    |                                                                                                                                                                                                                                                                  | Other:                        |

### II Description and Contents

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |  |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| <b>Description</b>       | The consolidation of land consists of the pooling of real estate in a given territory and of the equitable redistribution of property and other titles associated with it. It is elaborated to allow for all owners better land use and ensure sound implementation plans for the allocation of areas.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |  |
| <b>Detailed contents</b> | <p>A sector can be classified as building area but be however not all or not easily constructible; especially when this sector has an unfavourable parcels structure. In such cases, it is advisable, or even necessary to collect and distribute plots again, e.g. when:</p> <ul style="list-style-type: none"> <li>• In one part of the building zone, many plots are not buildable anymore or difficultly buildable due to size, shape, etc. ...</li> <li>• A new road should be performed or an existing road be widened, creating remaining parcels that are not buildable</li> <li>• An area hitherto little developed must be fitted, and it is to avoid excessive expropriations at the expense of some owners</li> </ul> <p>There are types of land consolidation:</p> <ul style="list-style-type: none"> <li>• by mutual agreement</li> <li>• by creating a union</li> <li>• ex officio by decision of the council</li> </ul> |  |

### III Implementation

|                         |   |                                    |
|-------------------------|---|------------------------------------|
| <b>Responsible body</b> | x | District / regional administration |
|                         |   | Municipal council                  |
|                         |   | Municipal administration           |



|                                                  |   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|--------------------------------------------------|---|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                  |   | External experts                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|                                                  |   | Other:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Further persons or organizations involved</b> | x | District / regional administration                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|                                                  | x | Municipal council                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|                                                  | x | Municipal administration                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|                                                  |   | Business Associations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|                                                  |   | SMEs                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|                                                  | x | Resident population                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|                                                  |   | Other:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Process of implementation</b>                 |   | <ul style="list-style-type: none"> <li>• Introduction of consolidation by the council on its own initiative or at the request of owners</li> <li>• Determination of the perimeter on deferred plan and approval by the State Council</li> <li>• Preparation of the decision to introduce</li> <li>• Draft and report</li> <li>• Public inquiry (30 days)</li> <li>• Briefing</li> <li>• Review of proposals and observations</li> <li>• Introductory decision published in the Official Gazette and possibility of recourse to the state council</li> <li>• Entry under the land register</li> <li>• Establishment of the Committee of execution</li> <li>• Establishment of the old state</li> <li>• Inventory redistribution claims</li> <li>• List of wishes for the new distribution</li> <li>• Public facility plan</li> <li>• Consideration by the relevant department</li> <li>• Determination of losses or gains</li> <li>• Cost allocation and accounting</li> <li>• Public Inquiry for awareness and review</li> <li>• Possibility of appeal to the Appeal Board</li> <li>• Decision of the Appeal Board</li> <li>• Approval of new state by the State Council</li> <li>• Requisition by the Department for registration of legal changes in land register</li> <li>• Cadastral Surveying</li> </ul> |
| <b>Duration / frequency</b>                      |   | <p>Frequency: Land consolidation can be undertaken at the initiative of the council or at the request of landowners.</p> <p>Duration: min. 5 years</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

|                                        |                                                                                                                                                                                                                                                                      |
|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Costs</b>                           | The costs for the procedure are shared in unequal proportions between the municipality and the owners concerned by the consolidation.                                                                                                                                |
| <b>Efforts</b>                         | The canton is required to ensure a uniform implementation of the law and therefore comply with the directives of the Federal Office for Land Registry law and land law (OFRF) and if necessary submit to inspections under the high monitoring on the land register. |
| <b>Spatial level of implementation</b> | Municipality                                                                                                                                                                                                                                                         |

#### IV Experiences of implementation

|                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reference</b>   | <a href="http://www.vs.ch/Navig/servicedeps.asp?Language=fr">http://www.vs.ch/Navig/servicedeps.asp?Language=fr</a> or<br><a href="http://www.vs.ch/Navig/navig.asp?MenuID=241">http://www.vs.ch/Navig/navig.asp?MenuID=241</a> or<br><a href="http://www.vs.ch/navig/navig.asp?MenuID=3410&amp;RefMenuID=0&amp;RefServiceID=0">http://www.vs.ch/navig/navig.asp?MenuID=3410&amp;RefMenuID=0&amp;RefServiceID=0</a><br>Suzanne Ducrey-Lenz<br>Avenue Maurice-Troillet 260<br>1950 Sion (Châteauneuf)<br>Téléphone: 027 / 606 78 06                                                                                          |
| <b>Experiences</b> | <p>The vast area of 20.7 ha located south of the village of Gampel was divided into 400 plots in the hands of 165 owners. On the whole, only 20 parcels were buildable. The consolidation was ordered by the municipal council and executed by a union. Following the land consolidation, 200 building plots were available. Each owner had to give up some of these surfaces to achieve the roads.</p> <p>During the consolidation of the surfaces, a part of the surfaces is usually transferred by private landowners to achieve the servicing and installations of public interest related to the sector concerned.</p> |

#### V Metadata / Contact:

|                                 |                                                           |                       |            |
|---------------------------------|-----------------------------------------------------------|-----------------------|------------|
| <b>Author of the fact-sheet</b> | STUMM<br>HES-SO Valais<br>TechnoArk 3<br>CH - 3960 Sierre | <b>Date of entry:</b> | 13.05.2011 |
|---------------------------------|-----------------------------------------------------------|-----------------------|------------|

#### VI Additional Material:

|                |                        |
|----------------|------------------------|
| <b>Picture</b> | No additional material |
|----------------|------------------------|

## Regional pool of commercial areas Neckar-Alb

|                            |                                                                                                                                                                                                        |                       |            |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------|
| <b>Metadata / Contact:</b> | Michael Weber, Institut für Stadt- und Regionalentwicklung (IfSR) an der Hochschule Nürtingen-Geislingen<br><br>Stefan v. Andrian-Werburg, Bosch & Partner GmbH, Josephspitalstraße 7, D-80331 München | <b>Date of entry:</b> | 20.02.2010 |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------|

### I Description / general information on the region

As a basis for comparing the preconditions for implementing the instrument and for transferring solutions

|                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name of region / project</b> | Regional pool of commercial areas Neckar-Alb<br>Regionaler Gewerbeflächenpool Neckar-Alb (REGENA)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Reference</b>                | Bürgermeister Reinhold Schäfer, Färberstraße 2, 72336 Balingen, Telefon 07433/170-203, bmschaefer@balingen.de, www.hfwu.de/regena                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Size</b>                     | Number of municipalities: 8<br><br>Total population of the region: approx. 90.000<br><br>Population of the single municipalities:<br>Balingen 34.049, Bitz 3.728, Bodelshausen 5.786, Geislingen 6.044, Haigerloch 10.794, Hechingen 19.150, Rangendingen 5.270, Schömburg 4.675<br><br>Area: 332 km <sup>2</sup><br><br>Area of the single municipalities / communities of municipalities included:<br>Balingen 90,34 km <sup>2</sup> , Bitz 8,82 km <sup>2</sup> , Bodelshausen 13,82 km <sup>2</sup> , Geislingen 31,95 km <sup>2</sup> , Haigerloch 76,46 km <sup>2</sup> , Hechingen 66,44 km <sup>2</sup> , Rangendingen 21,68 km <sup>2</sup> , Schömburg 23,27 km <sup>2</sup> |
| <b>Structure</b>                | The cities of Balingen and Hechingen are the regional centres of the region and are thus equipped with the respective functions. The further municipalities are of rural characteristics. The main road providing transregional access is the B27.<br><br>The municipalities are situated in two counties, the Zollernalbkreis and the County Tübingen, in Baden-Württemberg                                                                                                                                                                                                                                                                                                           |

### II Strategy / Process

|                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name of strategy / instrument</b>   | Regional pool of commercial areas                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Activities</b>                      | Joint marketing of the existing commercial areas with a total size of above 100 ha. Balancing of risks on the revenue side (revenues resulting from the sale and rent of real estates, tax revenues), possibly also the joint development of new commercial areas.                                                                                                                                                               |
| <b>Objectives / focus / motivation</b> | Main objectives of the initiative are: <ul style="list-style-type: none"> <li>• to enhance the economic situation of the municipalities by balancing risks and opportunities concerning the real estate marketing and tax revenues;</li> <li>• to lower the municipal risks of purchasing and developing real estates;</li> <li>• to enhance the economic structure of the municipalities and the region by providing</li> </ul> |

|                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                | <p>an optimised portfolio of commercial areas;</p> <ul style="list-style-type: none"> <li>• to avoid the ruinous competition and rivalry between the municipalities;</li> <li>• to lower the use of land for development and to avoid the designation and development of land in ecologically sensitive areas.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Process / “history”</b>     | <p>A strong inter-municipal competition was starting point and motivation of the project. The rivalry culminated in the competition for the acquisition of a new mail distribution centre, when the municipalities of the region underpriced each other.</p> <p>Before the start of the project regional association Neckar-Alb commissioned the elaboration of a feasibility study (2002-2004), which was co-funded by the ministries of the environment and economy of Baden-Württemberg. The feasibility study was the basis of the further development process in the framework of the REFINA-project “Regionaler Gewerbeflächenpool Neckar-Alb (REGENA)” (REFINA: Forschung für die Reduzierung der Flächeninanspruchnahme und ein nachhaltiges Flächenmanagement - Research for the Reduction of Land Consumption and for Sustainable Land Management). The project started in 2004, a contract on cooperation was agreed on in 2006.</p> <p>In the past, the inter-municipal cooperation in the region was rather weak and limited to fields as sewage or waste.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Outcomes / achievements</b> | <p>The model of the pool was developed during several working meetings and “round tables”. The following rules were the basis for consensus and for the regional cooperation concerning land management:</p> <p>(1) Each municipality participating in the pool has the right to offer local enterprises an area for extension on their own territory respectively in their own commercial area. In case the enterprise refuses to use the area, the participant is obliged to call the attention of the enterprise to other areas in the pool.</p> <p><i>This shall ensure that the municipalities remain responsible for the local development of their local enterprises in the framework of their proprietary development. At the same time solidarity in the pool is demanded.</i></p> <p>(2) In case a local entrepreneur is aiming to extend his business in his home municipality and only real estates of the pool are available (or a real estate of the pool is being preferred), the municipality can extract this real estate from the pool and assign it to its own commercial areas.</p> <p><i>This regulation ensures flexibility for the development of local enterprises.</i></p> <p>(3) In case a local entrepreneur is aiming to leave the municipality, the municipality should aim at interesting the entrepreneur in real estates of the pool. In any case there shall be no obstacles for an entrepreneur, who wants to leave the municipality in favour of a real estate from the pool.</p> <p><i>In order to overcome the competition between the municipalities, the enterprise shall stay within the pool so that the municipality „losing“ the enterprise continues to benefit from the settlement of the enterprise in the region.</i></p> <p>(4) In case an external investor is inquiring for settlement in one municipality instead of addressing the pool, the municipality has the right to offer real estates of the pool on its own territory to the enterprise in the first place. If the entrepreneur does not agree with the provided real estate, the municipality is obliged to direct the attention of the entrepreneur to other real estates of the pool.</p> <p><i>Thus the municipalities still have the possibility to carry out the acquisition of enterprises. Yet the acquisition must respect the boundaries of the framework of the pool.</i></p> |

|                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                    | <p>(5) In case an external investor prefers a real estate which is not yet in the pool, the municipality concerned can provide the real estate, but has to offer the area to the pool.</p> <p><i>This regulation ensures the flexibility of the municipalities in proceedings with external investors. Yet the flexibility of the municipalities is restricted with view to the solidarity of the pool.</i></p> <p>(6) In case an external investor directly contacts the pool it is first priority to the pool administration to maintain the interest of the investor and to provide a real estate suiting his demand. Second priority (in of several options) for the pool administration is to achieve a balanced distribution within the pool.</p> <p><i>Thus it shall be ensured that all areas of the pool are considered in the frame of the acquisition policy. It shall be aimed at a suitable consideration of all municipalities in the pool.</i></p> <p>(7) The settlement of enterprises as well as possible restrictions of the land utilisation must be effected in agreement with the municipality concerned. The municipality concerned does have a veto right.</p> <p><i>This regulation ensures that no unwanted enterprises or industrial plants (garbage incineration plant, garbage dump, power station etc.) can be settled on the territory of a municipality against the will of the municipality.</i></p> <p>Additionally, the municipalities jointly developed a complex model for rating and evaluating the real estates to be integrated into the pool.</p> <p>The basic regulations as well as organisational aspects were elaborated in formulated as a draft constitution with view to the foundation of a special purpose association. In this context, the regional council (Regierungspräsidium) brought up the question of the coherence of the activities with the competition laws. In cooperation with the competition authority of Baden-Württemberg (Landeskartellbehörde) an assessment of the pool model was carried which resulted in an admission of the model in the case of the REGENA project.</p> <p>In the meantime, all municipal councils positively decided on the participation in the project and on the pool model. Yet most of these municipal decisions contain as precondition, that further municipalities, which own large reserves on commercial areas, also take part in the project. All participating municipalities designated real estates on their territory for the pool. The integration of compensation areas connected to the legislation on nature conservation is envisaged for the further development of the pool.</p> |
| <b>External financial / administrative support</b> | <p>The regional planning association Neckar-Alb is a relevant driving force in the project REGENA and accompanied the project from the very beginning. Among other activities, the regional planning association initiated the commission of the feasibility study preparing the project REGENA. The federal administration as well as Baden-Württemberg financially supported this feasibility study. The regional planning association is integrated into the process; they participate in meetings and support the cooperation process between the municipalities.</p> <p>The project REGENA was financially supported by the federal ministry of education and research BMBF in the framework of the REFINA-programme (2004 until summer 2010).</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

### III Implementation

In this section it shall be described in detail and comprehensible for the “outsider”, how the strategy is implemented, how the cooperation or the commercial development work, which instruments are used, how responsibilities are shared etc..

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| <b>Organization and financing</b>                                     | <p>The municipalities plan to organize the cooperation in form of a special purpose association. Communication, coordination and management will be regulated by the constitution of the association.</p> <p>The decisions shall be taken in the assembly of the association, which will consist of the mayors and one additional representative of the municipalities participating. The assembly shall meet twice a year. The members of the assembly shall have the following voting rights. The members receive one vote with every 10% share of the pool started, whereas a maximum of 40% of the votes may be concentrated at one municipality</p> <p>The votes of the single members of the association must be casted unitarily. The meetings of the assembly are public in general.</p> <p>The members of the association participate in the financing of the pool according to their real estates inserted in the pool. If a real estate of the pool is sold, the expenses applicable for development as well as water- and sewage contribution will be refunded from the revenues, the remaining returns will go to the pool. In case the prize realised is below the value of insertion, a minimum of 50% of the value of insertion corrected by the development costs is to be paid to the pool.</p> <p>The municipality hands over to the pool the revenues of commercial taxes, which were gained from the enterprises settled in the pool, corrected by the allocation of commercial taxes paid to the German state and the federal state</p> <p>The expenses of the association will be financed by financial allocations, as far as they are not covered by other revenues to the pool. The amount of the allocation is preliminary fixed for each budget period (year) within the budget articles, differentiated in the administrative budget (allocation of administrative and operational costs) and the asset budget (capital allocation).</p> |
| <b>Spatial planning and soil policy</b>                               | <p>The responsibility of spatial planning (land utilization plan, development plan) remains under the authority of the respective municipality. The preparation of the commercial areas (acquisition of the real estate, infrastructural development) also remains in the responsibility of the respective municipality. On demand, the special purpose association may also carry out the development of the real estates.</p> <p>Due to the joint marketing of commercial areas and the balancing of risks the utilization of new land area is slowed down, as the pressure on the municipalities to provide real estates and to keep enterprises on their own territory is lowered.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Identification of supply and demand for commercial development</b> | <p>The municipalities participating in the project estimate, that 90% of the demand for commercial area origins within the region. These enterprises are in the main focus of the continuous contacts between local administration / councils and economy (questionnaires, inquiries, business fora).</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Marketing</b>                                                      | <p>The draft constitution determines that the special purpose association will be centrally responsible for the marketing. Thus there will be only one contact in the region responsible for the marketing of the commercial areas and the acquisition of enterprises. Additionally it is planned to install a joint platform and to concentrate the activities, which are carried separately until now.</p> <p>This aspect is still under discussion, as some municipalities are of the opinion that the municipalities shall be contacted in the first place.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Other instruments / methods</b>                                    | <p>The municipalities elaborated a joint model for the rating and evaluation of the areas to be inserted into the pool, which bases on standard land values.</p> <p>Additionally, the evaluation also considers economic criteria (e.g. topography, transport and IT-infrastructure, possible utilisation according to planning documents, price, layout of the real estate), ecologic criteria (e.g. soil quality, local climate, landscape, nature</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

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|  | <p>conservation) and urban planning criteria (urban planning concept, townscape, location). According to the valuation of the criteria, the model allows to add or reduce the value of the real estate up to 10%.</p> <p>According to the estimation of the consultant accompanying the project, a detailed model of rating and evaluation consisting of a comprehensive set of criteria is not essential. Eventually, a more simple solution might be more appropriate (e.g. determination of additions or reductions of the value by an external expert), which could be also made subject of negotiations in the assembly of the association.</p> |
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#### IV Review and lessons learned

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| <b>Success</b>                | <p>In the framework of the project, the communication between the municipalities could be deepened considerably. In addition to the cooperation concerning the marketing of commercial areas, further fields of actions could be opened (compensation areas according to the legislation on nature conservation, tourism).</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Difficulties</b>           | <p>The special purpose association could not be installed yet. Some of the municipalities in the county Zollernalbkreis, which were involved in the development of the pool model and which have available large commercial areas, are reluctant to join the association. But the accession of these municipalities is seen as an essential precondition for the installation of the special purpose association by many of the other municipalities.</p> <p>Some of the municipalities reluctant to join the association would prefer a more simple form of organizing the cooperation. But one of the municipalities generally refuses to participate in the special purpose association. This municipality has available large commercial areas, which can be easily and cheaply supplied with heat by the neighbouring heat power plant. Thus the municipality considers itself rather competitive and is not willing to accede to the cooperation.</p> <p>The process of cooperation is hindered by the low experience with inter-municipal cooperation and by negative experiences in former processes.</p> |
| <b>Balancing of interests</b> | <p>To the time being, a model for the balancing of interests has been elaborated. Yet before applying this model, the special purpose association has to be founded as the basis for further cooperation.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Commitment</b>             | <p>During the process, the persons involved have changed, e.g. due to elections etc. and the persons entering the project partly have a different attitude towards cooperation. One fraction of the municipalities favors a more loose cooperation concentrating on the joint marketing of the areas; the other fraction argues that a balancing of risks concerning the revenues of the sales of commercial areas and of commercial taxes is essentially required for the cooperation.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |



## Economic Region Heilbronn – Franken

|                            |                                                                                                                                                                                                        |                       |            |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------|
| <b>Metadata / Contact:</b> | Michael Weber, Institut für Stadt- und Regionalentwicklung (IfSR) an der Hochschule Nürtingen-Geislingen<br><br>Stefan v. Andrian-Werburg, Bosch & Partner GmbH, Josephspitalstraße 7, D-80331 München | <b>Date of entry:</b> | 20.02.2010 |
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### I Description / general information on the region

As a basis for comparing the preconditions for implementing the instrument and for transferring solutions

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| <b>Name of region / project</b> | Economic Region (Wirtschaftsregion) Heilbronn – Franken                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Reference</b>                | Steffen Schoch, Wirtschaftsregion Heilbronn-Franken GmbH, Weipertstraße 8 - 10, 74076 Heilbronn, Tel. 07131/7 66 98 - 60 <a href="http://www.heilbronn-franken.com">www.heilbronn-franken.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Size</b>                     | Number of municipalities: 4 counties with a total of 85 municipalities<br><br>Total population of the region: approx. 885.000<br><br>Population of the single municipalities<br>City of Heilbronn 122.098, County Heilbronn 329.743, County Hohenlohekreis 109.499, County Schwäbisch Hall 189.158, County Main-Tauber-Kreis 134.939<br><br>Area: approx. 4.765 km <sup>2</sup><br><br>Area of the single municipalities / communities of municipalities included:<br>City of Heilbronn 99,88 km <sup>2</sup> , County Heilbronn 1.099,94 km <sup>2</sup> , County Hohenlohekreis 776,75 km <sup>2</sup> , County Schwäbisch Hall 1.484 km <sup>2</sup> , County Main-Tauber-Kreis 1.304,41 km <sup>2</sup> |
| <b>Structure</b>                | The city of Heilbronn is the regional centre. The region is crossed by four motorways. The harbours of Wertheim (river Main) and Heilbronn (river Neckar) offer a connection to the Bundeswasserstraßen Main or Rhein-Main-Donau-Kanal respectively. The region is one of the main regions of economic growth in southern Germany.                                                                                                                                                                                                                                                                                                                                                                          |

### II Strategy / Process

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| <b>Name of strategy / instrument</b>   | Joint marketing of commercial areas. Main focus is put on the joint regional location marketing.                                                                                                                                                                                                                                                                 |
| <b>Activities</b>                      | Joint location marketing and joint marketing of commercial areas, mainly realized on the basis of a joint internet platform.                                                                                                                                                                                                                                     |
| <b>Objectives / focus / motivation</b> | Receiving higher attention on the regional, national and international level by a joint presentation.                                                                                                                                                                                                                                                            |
| <b>Process / "history"</b>             | Foundation of the Wirtschaftsregion Heilbronn-Franken GmbH in 1999.                                                                                                                                                                                                                                                                                              |
| <b>Outcomes / achievements</b>         | A joint internet platform has been installed, presenting all available commercial areas in the region on a single view. Information given to describe the commercial areas comprises among other things the typology of the areas, their size and their suitability for different purposes. The joint presentation enhanced the perception from the outside, yet |



|                                                    |                                                                                                                                                              |
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|                                                    | it is not possible to measure the precise effect of the activity.<br>Further cooperation could be installed concerning the fields of education and research. |
| <b>External financial / administrative support</b> | Not known.                                                                                                                                                   |

### III Implementation

In this section it shall be described in detail and comprehensible for the “outsider”, how the strategy is implemented, how the cooperation or the commercial development work, which instruments are used, how responsibilities are shared etc..

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| <b>Organization and financing</b>                                     | Limited liability company (Ltd.)<br><br>Shareholders of the company are the countys and cities, the chambers of commerce and the regional planning association Region Heilbronn-Franken. The costs arising from the activities are financed by an allocation between the shareholders.                                                   |
| <b>Spatial planning and soil policy</b>                               | The Wirtschaftsregion Heilbronn-Franken GmbH does not take the task of spatial planning. In some parts of the region Heilbronn-Franken, municipalities developed joint land utilization plans.                                                                                                                                           |
| <b>Identification of supply and demand for commercial development</b> | There was no systematic analysis of the demand side, the supply side of commercial areas is presented on the platform.                                                                                                                                                                                                                   |
| <b>Marketing</b>                                                      | Marketing based on the internet-platform<br><a href="http://www.heilbronn-franken.com/DATA/REGION/region_freie_flaechen.php">www.heilbronn-franken.com/DATA/REGION/region_freie_flaechen.php</a><br>Additionally the Wirtschaftsregion Heilbronn-Franken presents itself jointly on trade fairs as for instance the Expo Real in Munich. |
| <b>Other instruments / methods</b>                                    |                                                                                                                                                                                                                                                                                                                                          |

### IV Review and lessons learned

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| <b>Success</b>                | The joint presentation enhanced the perception from the outside, yet it is not possible to measure the precise effect of the activity. The region is perceived as a growing and dynamic region in Baden-Württemberg and beyond federal and national borders. The ties to neighboring regions could be strengthened. There is a close cooperation with Baden-Württemberg International and with the region Stuttgart.<br><br>The organizational efforts are rather low.<br><br>A series of enterprises from the outside could be acquired and settled in the region. The good accessibility of the region is a central location factor of the region. |
| <b>Difficulties</b>           | The thematic focus and the interests of the shareholders of the Wirtschaftsregion Heilbronn-Franken differ rather strongly (education, marketing of commercial areas, tourism).                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Balancing of interests</b> | In general, the balancing of interests also concerning smaller municipalities is of highly valued within the organization.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Commitment</b>             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

## Urban Development Association Ulm/Neu-Ulm

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|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|-----------|
| <b>Metadata / Contact:</b> | Andreas Raab, Regional- und Stadtplaner<br>SRL, München<br><br>Stefan v. Andrian-Werburg, Bosch & Partner GmbH, Josephspitalstraße 7, D-80331 München | <b>Date of entry:</b> | 15.3.2010 |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|-----------|

### I Description / general information on the region

As a basis for comparing the preconditions for implementing the instrument and for transferring solutions

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| <b>Name of region / project</b> | Urban Development Association (Stadtentwicklungsverband) Ulm/Neu-Ulm                                                                                                                                                                                                                                                                                                                           |
| <b>Reference</b>                | Stadtentwicklungsverband Ulm/Neu-Ulm<br>Augsburgerstr. 15<br>89231 Neu-Ulm<br><br>Bernd Neidhart<br>Telefon: 0731/7050-103<br><a href="mailto:b.neidhart@stadt.neu-ulm.de">b.neidhart@stadt.neu-ulm.de</a><br><a href="http://www.stadtentwicklungsverband.ulm.de">www.stadtentwicklungsverband.ulm.de</a>                                                                                     |
| <b>Size</b>                     | Number of municipalities: 2, Cities of Ulm and Neu-Ulm<br><br>Total population of the region: 168.402<br><br>City of Ulm: 116.528, City of Neu-Ulm: 51.874<br><br>Area: 199,65 km <sup>2</sup>                                                                                                                                                                                                 |
| <b>Structure</b>                | The cities of Ulm and Neu-Ulm are a joint regional centre taking the central functions for the surrounding area, e.g. as: place of employment, supply of services and goods, education (university) and research, medicine etc.;<br><br>The city of Neu-Ulm (Bavaria) is county capital hosting the respective administration; the city of Ulm (Baden-Württemberg) is independent of a county. |

### II Strategy / Process

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| <b>Name of strategy / instrument</b>   | Pool of commercial areas focusing on common marketing; Regional marketing                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Activities</b>                      | The core tasks of the association are e.g. the assignment of real estates, business development, contacts to local and regional economy, joint location marketing. Concerning real estates, the association concentrates on marketing and on finding and providing suitable sites for the inquiring businesses. Additionally, the development of general municipal infrastructures has been carried out in recent times (multi-purpose town hall).                          |
| <b>Objectives / focus / motivation</b> | Building a common portfolio of commercial areas as well as setting up a common regional marketing in order to: <ul style="list-style-type: none"> <li>• Stop the situation of municipal competition and start the concentration of resources;</li> <li>• Jointly prepare for the oncoming competition of regions („Wettbewerb der Regionen“) (regional marketing);</li> <li>• Preferably maintain and develop the existing regional and local enterprises in the</li> </ul> |

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|                                                    | area                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Process / "history"</b>                         | <p>The starting point of the cooperation was a strong competition concerning the acquisition of new enterprises in the 1990s (e.g. mail sorting centre). With the experience of this strong competition, the awareness and insight rose to overcome the rivalries and to concentrate administrative and financial resources.</p> <p>The process was strongly fostered by the administrations of the two cities – private consultant and planning offices were not involved or only to a low extent.</p>                                                                                                                                                                  |
| <b>Outcomes / achievements</b>                     | <p>Foundation / enactment of the ordinance of the special purpose association in 2000;</p> <p>Commercial area sold 2000 - 2009: total: 880,8 ha; Ulm: 519,6 ha; Neu-Ulm: 361,2 ha;</p> <p>Starting in 2008, the SEV made cooperation agreements with the smaller neighbouring municipalities Elchingen, Nersingen, Dornstadt and Blaustein concerning the common marketing of commercial areas. These municipalities are "only" cooperating partners, they are not members of the SEV;</p> <p>Starting from the cooperation in the SEV, cooperation in a series of other fields evolved in the meantime, among others the joint development of a multi-purpose hall.</p> |
| <b>External financial / administrative support</b> | The process has not received governmental funding or support.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

### III Implementation

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| <b>Organization and financing</b>       | <p>Foundation of a special purpose association "Stadtentwicklungsverband Ulm/Neu-Ulm" (Urban development association) according to the Bavarian law on municipal cooperation (KommZG). The association is located in Neu-Ulm.</p> <p>The chair of the association and the management board are divided between the two cities, whereas the responsibility changes every year, i.e. one city takes the chair of the association in person of the mayor, the other city takes the management board. In the following year, these responsibilities are swapped. The association assembly is composed of 13 members of the town councils of Ulm and Neu-Ulm each, so that both cities are equally represented (independent of their size in population or area).</p> <p>The association is financed by means of an allocation of funds, which is calculated for two thirds according to the population size and for one third according to the size of the commercial areas inserted in the pool.</p> <p>The administrative offices responsible for real estates, construction and business development were left in the frame of the administrations of the two cities, in order to avoid the installation of new structures and in order to effectively use the existing resources. The association consciously was installed on a lean basis (only one additional half-time secretary). In addition to the current exchanges a jour fix taking place every two weeks was installed, serving to commonly coordinate the location of business.</p> |
| <b>Spatial planning and soil policy</b> | <p>The core element of the SEV is the coordination of supply and demand in one organizational unit, with special focus on the development of the existing local and regional businesses. The SEV can offer a diverse set of commercial areas meeting different location needs to the interested enterprises by means of the joint portfolio of commercial areas and the additional offers of areas and brownfields on the web-based commercial real estate exchange market (Objektbörse). Possible investors are offered used commercial areas firstly, referring to the web-based commercial real estate exchange market, currently containing approx. 200 objects.</p> <p>As a service for the investor, the responsible at the SEV regularly clarifies that a project</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

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|                                                                       | <p>can be permitted as planned in advance of the sale of a real estate</p> <p>Currently approx. 110 ha of commercial areas are being marketed in the area of the association and the cooperation. In Neu-Ulm extensive military conversion areas have been developed.</p>                                                                                      |
| <b>Identification of supply and demand for commercial development</b> | The strategy focuses on the actual demands and needs; the maintenance and development of existing local and regional enterprises is at the core of the cooperation.                                                                                                                                                                                            |
| <b>Marketing</b>                                                      | The task of a joint regional marketing is highly valued and bases - among other things - on a cluster strategy (comprising logistics, information technologies, Life Science). Activities of the common regional marketing are among others: website, brochures, business days, professional conventions, events, participation at business fairs (Expo REAL). |
| <b>Other instruments / methods</b>                                    | Installation of a web-based commercial real estate exchange market containing up to 200 shops, store-houses, halls, offices and areas of private vendors, which are ready for sale or rent.                                                                                                                                                                    |

#### IV Review

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| <b>Success</b>                | <ul style="list-style-type: none"> <li>• 10 years of joint and continuous development;</li> <li>• One joint agency representing the SEV;</li> <li>• Sale / rent of approx. 880 ha of commercial areas;</li> <li>• Promotion of the location Ulm/Neu-Ulm in the „competition of regions“;</li> <li>• Promotion of a common identity in the population</li> </ul> <p>The organizational basis of the SEV can be regarded as rather flexible and demand-oriented, on the one hand concerning the organizational structure of the special purpose association, on the other hand concerning the provision of commercial areas (wide portfolio of commercial areas).</p> |
| <b>Difficulties</b>           | The cooperation is being impeded by the different systems of taxation and financial allocation in the federal states concerned (Bavaria, Baden-Württemberg).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Balancing of interests</b> | Other than the allocation of the financial burdens, the allocation of commercial taxes (revenues) has not been carried out yet: until 2006, estimations revealed that effectively no allocation of revenues was necessary. The cities also refrained from carrying out a formal allocation of revenues due to the complexity of the matter owing to the fact that the cities belong to different federal states (tax systems, financial allocation regulations) and due to the different status of the two cities (The city of Ulm being independent of a county, contrary to the city of Neu-Ulm).                                                                 |
| <b>Commitment</b>             | Administration, politicians and population bear a positive attitude towards the regional sharing of the municipal activities, concerning the commercial location development as well as other areas.                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

## Business Location Südtirol – Alto Adige

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| <b>Metadata / Contact:</b> | Miriam L. Weiß<br>European Academy – Institute for Regional Development and Location Management<br>Viale Druso 1, I-39100 Bolzano<br>miriam.weiss@eurac.edu | <b>Date of entry:</b> | 29.07.2010 |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------|

### I Description / general information on the region

As a basis for comparing the preconditions for implementing the instrument and for transferring solutions

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| <b>Name of region / project</b> | BLS – Business Location Südtirol – Alto Adige<br>South Tyrol, Italy                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Reference</b>                | Verena von Delleman<br>Assistant to the Director<br><br>BLS – Business Location Südtirol · Alto Adige<br>Südtirolerstraße 58 / Via Alto Adige 58<br>I-39100 Bozen / Bolzano<br><br>Phone: +39 0471 066 602<br><a href="http://www.bls.info">http://www.bls.info</a>                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Size</b>                     | Number of municipalities concerned by the project: 116<br><br>Total population of the region: ca. 496.500<br><br>Smallest municipality <200 inhabitants (Waidbruck), biggest ca. 100.000 inhabitants (Bolzano)<br><br>Area [km <sup>2</sup> ]: 7.400km <sup>2</sup><br><br>Area of the single municipalities / communities of municipalities included: smallest 1,66km <sup>2</sup> (Kuens); biggest 302,5km <sup>2</sup> (Sarnatal)                                                                                                                                                                                                                                                                           |
| <b>Structure</b>                | The Autonomous Province of Bolzano-South Tyrol comprises 116 municipalities. It is divided into seven district communities which fulfill various supra-municipal tasks, in particular in the fields of social welfare and environment.<br><br>Bruneck, Brixen, Bolzano, and Meran are considered the regional centers of South Tyrol with the respective functions, e. g. as main places of employment and education and research centers. Many of the 116 municipalities have rural characteristics and show a high commuter ratio but are generally well equipped in terms of infrastructure and public services (schools, community halls, retirement homes, fire brigade, social and health institutions). |

### II Strategy / Process

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| <b>Name of strategy / instrument</b> | Business settlement and location marketing.                                                                                                                                                                                              |
| <b>Activities</b>                    | Location Service for businesses ("One-stop shop"):<br><ul style="list-style-type: none"><li>Supervise and offer all-round-service regarding questions related to settlement and location (for settling and settled businesses)</li></ul> |

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|                                        | <ul style="list-style-type: none"> <li>Initially consult interested businesses regarding location questions (provide information on taxes, law, promotion, financing, authorities, permits, company foundation).</li> <li>Assist with the search for appropriate commercial areas and realties in South Tyrol by using a commercial zones database.</li> <li>Mediate contacts between interested businesses and owners of commercial zones (be it the municipalities, private owners or the BLS itself) via assignment or contractual processes.</li> <li>Provide a network to organizations, service structures, and economic associations.</li> <li>Process requests for the acquisition of land.</li> <li>Promote the settlement of businesses of key branches (renewable energies, mountain, foodstuffs)</li> </ul> <p>Location Service for municipalities:</p> <ul style="list-style-type: none"> <li>Make available experts' assessment and interpretation of norms or assistance in case of implementation problems in the field of commercial areas.</li> <li>Offer the possibility to take over various services (in line with the spatial planning law): <ul style="list-style-type: none"> <li>- prepare implementation plan;</li> <li>- realize development work;</li> <li>- process assignment requests.</li> </ul> </li> <li>Develop common location strategies and measures for and with municipalities.</li> <li>Process payment/promotion requests.</li> </ul> <p>Location providing:</p> <ul style="list-style-type: none"> <li>Open, develop, and prepare properties.</li> <li>Gather available properties in a database, therewith, offer information to interested businesses.</li> </ul> <p>Location marketing:</p> <ul style="list-style-type: none"> <li>Deepen the positive image of South Tyrol as economic location and South Tyrol's key branches.</li> <li>Consolidate the brand South Tyrol on the local, national, and international levels.</li> </ul> <p>Film:</p> <ul style="list-style-type: none"> <li>Offer full service and consultation regarding South Tyrol as film location to movie and TV productions.</li> </ul> |
| <b>Objectives / focus / motivation</b> | <p>The BLS' main objectives are:</p> <ul style="list-style-type: none"> <li>Market South Tyrol as attractive economic and investment location.</li> <li>Create an offer of qualified work places.</li> <li>Purchase commercial properties and settle businesses, which promote the development of South Tyrol's economically strategic areas.</li> </ul> <p>Underlying reasons for the BLS' strategy:</p> <ul style="list-style-type: none"> <li>Remain competitive and pool resources.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

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|                                                    | <ul style="list-style-type: none"> <li>Strengthen the region's strengths.</li> <li>Preserve work places in rural areas.</li> <li>Guarantee a reasonable diffusion of work places, taking into consideration the link to spatial planning and land shortage for topographic reasons.</li> <li>Adapt the existing structures to the economic situation by taking into account the correlation of spatial planning, environment, and urban development.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Process / "history"</b>                         | <p>The spatial planning reform (August 1, 2007) stipulates the installation of the BLS agency. Due to the shortage of land and the need for qualified workers, a more strategic and active location marketing for very specific companies from key branches is required.</p> <p>The BLS was made up of the departments for commercial/crafts areas (Amt für Gewerbegebiete) and infrastructure (Amt für Infrastrukturen) of the provincial government. After having assumed work in January 2009, the economic development strategy for South Tyrol was officially presented in January 2010.</p> <p>In the upcoming months (until March 2011) the BLS is going to:</p> <ol style="list-style-type: none"> <li>Create a basis of available data of commercial/industrial/crafts zones.</li> <li>Analyze the location's strengths and weaknesses.</li> <li>Define functional areas in South Tyrol.</li> <li>Develop a common strategy and concrete measures for implementation and define clearly the distribution of roles and tasks.</li> </ol> <p>Local and regional stakeholders (municipalities, enterprises, experts) will be integrated in the process as well as existing structures and thematic links will be considered.</p> |
| <b>Outcomes / achievements</b>                     | Work is in process.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>External financial / administrative support</b> | The BLS is financed by the provincial government.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

### III Implementation

In this section it shall be described in detail and comprehensible for the "outsider", how the strategy is implemented, how the cooperation or the commercial development work, which instruments are used, how responsibilities are shared etc..

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| <b>Organization and financing</b>       | <p>The government of the Autonomous Province South Tyrol/Alto Adige presides over the BLS. The administrative board, decision-making committee, and board of management ensure the performance and efficiency of the BLS. The agency has four departments (location service, location providing, marketing, film,) and 20 employees.</p> <p>The Autonomous Province of Bolzano-South Tyrol is the sole shareholder. It additionally finances the BLS. A large part of the budget is spent on the acquisition, planning, and development of commercial/industrial/crafts zones to be available in the short term. A smaller part of the budget is spent on the agency's administration.</p> <p>In terms of organization and decision-making, the executive body and the Autonomous Province of Bolzano-South Tyrol as sole shareholder participate in the corporate meetings.</p> |
| <b>Spatial planning and soil policy</b> | The BLS primarily aims at identifying vacancies, brown fields, unused or insufficiently used areas for future commercial use in the short term. This concerns equally commercial areas of interest to the province and commercial areas of interest to the municipalities.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |



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|                                                                       | <p>In South Tyrol, there is a shortage of land caused by the topographic conditions. Thus, land use for business settlement is regulated by law. Within the framework of its tasks, the BLS adheres to and mediates these laws to potential businesses/investors.</p> <p>The municipalities have the authorization and responsibility to submit the zoning/development plans for local real estate. In case of a trade/commercial area of interest to the municipality, the costs for preparing the zone are paid for in parts by the municipality, the provincial government, and the settling businesses. The contribution of the municipality, however, is usually small.</p> |
| <b>Identification of supply and demand for commercial development</b> | <p>It is one main aim of the BLS to develop a commercial/industrial real estate/property database. To obtain the relevant data, the BLS proceeds as follows:</p> <ul style="list-style-type: none"> <li>• use existing material: analysis and evaluation of previous studies, surveys, and data;</li> <li>• question municipalities and entrepreneurs;</li> <li>• analyze the situation in the commercial areas (occupancy/vacancy rate) aimed at continuous land use monitoring;</li> <li>• exchange information with municipalities, enterprises, and experts in workshops and working groups.</li> </ul>                                                                      |
| <b>Marketing</b>                                                      | <p>In the field of marketing, the BLS envisions the following:</p> <ul style="list-style-type: none"> <li>• Deepen the positive image of South Tyrol as economic location and South Tyrol's key branches.</li> <li>• Consolidate the brand South Tyrol on the local, national, and international levels.</li> </ul>                                                                                                                                                                                                                                                                                                                                                              |
| <b>Other instruments / methods</b>                                    | <p>Evaluation of the municipalities on the basis of strengths/weaknesses profile and with regard to spatial, statistic and functional relations.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

#### IV Review

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| <b>Success</b>                | <p>For the time being, it is difficult to estimate the success of the agency as the implementation of its strategy was launched only recently.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Difficulties</b>           | <p>As the agency is still recent, various parties (e. g. mayors, economic experts) are skeptical about single aspects of the agency's economic strategy for South Tyrol. Subjects for debate are for example the delimitation of functional areas in South Tyrol and the relevance of a property database for municipal commercial/industrial/crafts zones. Interviews with mayors in the COMUNIS pilot area Passeier Valley revealed skepticism on their part as issues of spatial planning and development of commercial zones has traditionally been the municipality's competence. Additionally, most requests for developing/extending a commercial zone have come from within the municipality without a mediator on the provincial level.</p> |
| <b>Balancing of interests</b> | <p>A mechanism of balancing interests has not been established at this point.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Commitment</b>             | <p>It is difficult to assess the commitment at this point in time on the part of the municipal stakeholders. Moreover, it should be mentioned that cooperation on the part of the municipalities is not obligatory but based on voluntary cooperation. Municipalities may decide to submit information about their commercial zones to the BLS or abstain from it. On the regional level, administration and politicians have a positive attitude towards the installation of the agency, seeing a great potential for increasing the attractiveness of South Tyrol as economic location.</p>                                                                                                                                                        |



## Syndicate Passeier Economy

|                            |                                                                                                                                   |                       |                                    |
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| <b>Metadata / Contact:</b> | Miriam L. Weiß<br>European Academy – Institute for Regional Development and Location Management<br>Viale Druso 1, I-39100 Bolzano | <b>Date of entry:</b> | 07.05.2010<br>(updated March 2012) |
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### I Description / general information on the region

As a basis for comparing the preconditions for implementing the instrument and for transferring solutions

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| <b>Name of region / project</b> | Region: ca. companies and three municipalities of the Passeiertal<br>Project: Syndicate Passeier Economy (EN)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Reference</b>                | Konsortium Passeier Wirtschaft<br>Holzländestraße 15<br>I-39015 St. Leonhard in Passeier<br>Contacts:<br>Ulrich Königsrainer (local coordinator)<br>Email: <a href="mailto:info@passeier-wirtschaft.it">info@passeier-wirtschaft.it</a><br>Web: <a href="http://www.passeier-wirtschaft.it">www.passeier-wirtschaft.it</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Size</b>                     | Number of municipalities: 3<br>St. Martin in Passeier, St. Leonhard in Passeier, Moos in Passeier<br>Total population of the area: 8.761<br>Population of the different municipalities:<br>St. Martin in Passeier: 3.099 inhabitants, St. Leonhard in Passeier: 3.488 inhabitants, Moos in Passeier: 2.174 inhabitants<br>Area [km <sup>2</sup> ]: 313,39 km <sup>2</sup><br>St. Martin i. P.: 30,49km <sup>2</sup> ; St. Leonhard i. P.: 88,32km <sup>2</sup> ; Moos i. P.: 194,58km <sup>2</sup>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Structure</b>                | The municipalities are located in the upper part of the Passeier Valley. They are the furthest away from the economic center and health resort Meran (35.000 inhabitants) in contrast to the other valley municipalities. As biggest municipalities in the area with the largest industrial and crafts areas, however, they represent important places of work (two large and internationally operating companies). At the same time, many small and medium enterprises offer work places for the local population. All municipalities and companies are located in the district community <i>Bezirksgemeinschaft Burggrafenamt</i> which comprises 26 municipalities altogether.<br><br>Besides the cooperation in the <i>Konsortium</i> , the municipalities cooperate and share costs in the fields of energy and environment (e. g. common cycling tracks, waste management), social services (e. g. health, retirement homes), and recreation (e. g. sports fields, swimming pools). |

### II Strategy / Process

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| <b>Name of strategy / instrument</b> | Voluntary and mixed consortium/syndicate without a view to profit according to Art. 2612 ff. of the Italian Codice Civile.<br><br><b>German:</b> Konsortial-Genossenschaft; mit einer GmbH gleichzustellen; keine |
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|                                        | Gewinnabsichten; basiert auf italienischem Zivilgesetzbuch.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Activities</b>                      | <p>The core elements, main tasks and activities of the strategy are:</p> <ul style="list-style-type: none"> <li>• <b>Joint development</b> of an economic plan and common marketing strategy to re-position the area locally and regionally.</li> <li>• Find a realizable unique selling proposition (USP).</li> <li>• <b>Inwards and outwards representation</b> of the valley's economy.</li> <li>• Serve as <b>point of contact</b> for the municipalities and businesses and their economic interests. Deal with problems in the commercial/crafts zones. Common organization of exhibitions.</li> <li>• Organization of <b>events</b> to present and promote the local economy (a selection): <ul style="list-style-type: none"> <li>- <b>Wirtschaftsschau</b> – Passeier EXPO 2006 and 2012</li> <li>- <b>Holz-Tage Passeier</b>, April/May 2010</li> <li>- <b>Workshop Holz Passeier</b>, February 2011</li> <li>- <b>Holz Passeier – Dendrochronologie</b>, September 2011</li> <li>- <b>Passeierer Holzschätze</b>, October 2011</li> <li>- <b>Erfolg mit Produkten aus Holz</b>, January 2012</li> </ul> </li> <li>• Organization of <b>further education</b> (foreign languages, safety at work, etc.)</li> </ul> |
| <b>Objectives / focus / motivation</b> | <p>The <i>Konsortium</i> aims at promoting the Passeier economy in general and the promotion of the activities of the participating companies in particular in order to enhance their efficiency and competitiveness.</p> <p>The members of the consortium pursue the following common goals:</p> <ul style="list-style-type: none"> <li>• Underline the attractiveness of the Passeier economy.</li> <li>• Revalue the economic area Passeier.</li> <li>• Demonstrate the economic capabilities in the valley.</li> <li>• Increase the awareness for Passeier companies.</li> <li>• Carry out image-advertising for the participating companies.</li> <li>• Promote the harmonization process of environment and economy.</li> <li>• Show the traffic problems and present solutions.</li> <li>• Offer and organize apprenticeships and advanced trainings of entrepreneurs and their employees.</li> <li>• Revalue the work place Passeier.</li> <li>• Promote the employees of the member companies.</li> <li>• Maintain ongoing media-presence.</li> <li>• Represent and enforce the interests of Passeier Wirtschaft in the valley and beyond.</li> </ul>                                                               |
| <b>Process / “history”</b>             | <p>The <i>Konsortium</i> was founded on 15 June 2005. It is a cooperation of 40 local companies, which aim at commonly increasing their renownedness regionally and improve their ability to realize goals and interests by appearing uniformly and in a coordinated way. It is an innovation in the valley as for the first time all economic sectors are represented in the form of enterprises (crafts, industry, manufacturing industry, services) as well as local stakeholders (agriculture, tourism, hospitality industry, trade). Its doors are open for other businesses.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

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|                                                    | <p>After the Economic Exposition (EXPO) in 2006, it was questionable whether and how the <i>Konsortium</i> would persist.</p> <p>Over time, working groups were formed (see III Implementation, Organization and financing).</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Outcomes / achievements</b>                     | <ul style="list-style-type: none"> <li>Implementation of advanced training sessions (foreign languages, safety at work, workshops, etc.).</li> <li>The <b>initiative “Best of Passeier”</b> is oriented towards the idea of best practices. Regularly, innovative companies are nominated by the consortium to represent themselves, thereby giving other firms the opportunity to learn from them about innovative ideas, different production methods or business models, etc.</li> <li>Lengthy discussions about regional value chains and the willingness to be more innovative and attractive resulted in the decision to concentrate on and use the wood available in the area (so far, most wood is being imported from other parts of South Tyrol or other European countries!). If realized, this initiative will imply a common marketing strategy as well.<br/><b>Result: “Holz-Tage Passeier”, April/May 2010</b></li> <li>Speaking with one voice may have also contributed to accelerating the process of receiving broadband in the valley.</li> </ul> |
| <b>External financial / administrative support</b> | <p>The <i>Konsortium</i> is without a view to profit but it may make money in order to sustain itself and its activities. The Board of Directors receives a commonly set remuneration.</p> <p>In the beginning, member fees were high in order to sustain the organization. Recently, the fees were revised since they were not entirely used. They were reduced to one-tenth of the original fee. Sources of other public contributions are sponsors (banks, municipalities, assurance) and course participation fees.</p> <p>In case of events, required consultancy, and the organization and implementation of courses, the <i>Konsortium</i> submits an application for contributions from the province (if admitted, these contributions can amount to 40-50% of the total costs).</p>                                                                                                                                                                                                                                                                          |

### III Implementation

In this section it shall be described in detail and comprehensible for the “outsider”, how the strategy is implemented, how the cooperation or the commercial development work, which instruments are used, how responsibilities are shared etc..

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| <b>Organization and financing</b> | <p>The <i>Konsortium</i>’s managing committee is made up of three to five members and is presided over by the President. A local coordinator is elected who assumes organizational and logistic tasks and serves as point of contact for interested businesses and the concerns of the members.</p> <p>The number of members is unlimited. Companies, associations, private and public entities can join, which – due to their relation to the economy – can contribute to the promotion of the valley’s economy.</p> <p>Decisions are taken in the assembly (all members) by members whose share in the syndicate make up an absolute or a two-thirds-majority. The decisions are carried out by the Board of Directors.</p> <p>The <i>Konsortium</i> is without a view to profit but it may make money in order to sustain itself and its activities. The <i>Konsortium</i> is fully financed by the sponsors (municipalities, banks, assurance). The Board of Directors receives a commonly set remuneration.</p> <p>The <i>Konsortium</i> is subdivided in two working groups:</p> <ol style="list-style-type: none"> <li>1. Economic Exposition (<i>Wirtschaftsschau</i>)</li> </ol> |
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|                                                                       | <p>2. Communication (<i>Kommunikation</i>)</p> <p>The “initiative Wood” (<i>Holz</i>) led to establishing two working groups.</p> <ol style="list-style-type: none"> <li>1. Procurement of wood (<i>Holzbeschaffung</i>)</li> <li>2. Architecture wood (<i>Architektur Holz</i>)</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Spatial planning and soil policy</b>                               | <p>This initiative primarily refers to economic development. Spatial planning and soil policy do not play a role at the moment. If it wanted, the <i>Konsortium</i> could acquire ground, too, but it does not want to take this entrepreneurial stand. However, following a request of businesses, municipalities can consult the <i>Konsortium</i> and ask for its opinion, e.g. on the development of a new commercial/crafts zone.</p> <p>A cooperation of the <i>Konsortium</i> with the agency <i>Business Location Südtirol/Alto Adige (BLS)</i> is considered possible. Regarding the importance of wood for the valley, the BLS could serve as mediator for finding and settling a sawmill in the valley (from within or outside the region) in order to extend this branch.</p> |
| <b>Identification of supply and demand for commercial development</b> | <p>In the beginning, interviews were conducted and questionnaires were distributed to identify the demands of the businesses. However, businesses as well as the <i>Konsortium</i> are rather small. Human resources are missing to institutionalize certain activities. Demand for commercial ground is settled case by case and individually in the municipalities. Moreover, inter-municipal commercial location development is not an objective of the <i>Konsortium</i>.</p>                                                                                                                                                                                                                                                                                                         |
| <b>Marketing</b>                                                      | <p>The <i>Konsortium</i> has engaged an external local press agency which carries out four to five orders per year focusing on a particular theme: energy, further training, wood, outward image of the area. The local coordinator functions as link between the press and the businesses. Additionally, the <i>Konsortium</i> presents itself, its projects, and activities on a website and regularly releases articles in the local and regional press.</p>                                                                                                                                                                                                                                                                                                                           |
| <b>Other instruments / methods</b>                                    | <p>In the beginning, a survey was conducted to identify the demand for and aims of the <i>Konsortium</i>. It was established how the businesses were situated economically. As the single economic branches are rather small and businesses diverse, however, they were difficult to compare with each other. Nevertheless, the survey revealed a high number of businesses working with wood. Therefore, in 2009, a study was conducted among those businesses to identify the valley’s strengths in this field. Results were presented at the plenary assembly in fall 2009.</p>                                                                                                                                                                                                        |

#### IV Review

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| <b>Success</b>      | <p>According to the <i>Konsortium</i>’s local coordinator, continuity was decisive for the success and continuation of the association. Initially, after the economic exposition “Passeier EXPO 2006”, the development was uncertain. It was decided to reduce the program offer but events, courses, etc. took place continuously.</p> <p>One important step was certainly taken by identifying wood as a material that can be used for different purposes in the private and public sectors in areas of social, political and economic life. It remains to be seen in how far this approach is realizable and will pay off as farmers are unwilling to cut down the trees and because the wood is – in relative terms – not of highest quality.</p> |
| <b>Difficulties</b> | <p>At the beginning, there were some difficulties (formal defects, misunderstandings) because an external consultant was employed. The <i>Konsortium</i> realized the necessity to make use of the region’s own know-how and endogenous potential. Among other things, this produced the wood-initiative.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                         |

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|                               | <p>Recently, the sponsors demanded a contribution (<i>Führungsbeitrag</i>) to the working costs from the member businesses. Upon entering the <i>Konsortium</i> as a member, a business pays a certain amount into the share capital, which cannot be touched/used by the <i>Konsortium</i> – it is not working capital. This necessitates a reconsideration of the type of company.</p>                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Balancing of interests</b> | <p>In fall, a general assembly is organized to exchange ideas and discuss the aims for the upcoming year after having balanced interests and conferred about costs and benefits of individual measures (e. g. in the past, money was spent on further education while there was no demand for it).</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Commitment</b>             | <p>Some member businesses and individuals consider the <i>Konsortium</i> as being very important for the local development and promotion on the regional level. The organization is well-known in other South Tyrolean valley communities. These businesses are very interested in participating in the next economic exposition (EXPO) and recognize the benefits from common representation.</p> <p>Recently, the EU-project “Kooperation im Bereich Technologien der KMU in Passeier zur Entwicklung lokaler Technologie-orientierter Wertschöpfungsketten” which resulted in the wood innovation initiative. It is intended to start the implementation phase with even less external consultation and by sponsorship on the part of the province.</p> |

## Economy centre of Gorenjska region

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| <b>Metadata / Contact:</b> | Helena Cvenkel<br>BSC Kranj | <b>Date of entry:</b> | 30.05.2010 |
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### I Description / general information on the region

As a basis for comparing the preconditions for implementing the instrument and for transferring solutions

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| <b>Name of region</b> | Gorenjska                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Reference</b>      | BSC Kranj (responsible for the preparation of the strategy)<br>Contact:<br>M.Sc. Bogo Filipič, Tel.: 00386 4 281 72 30<br>bogo.filipic@bsc-kranj.si                                                                                                                                                                                                                                                         |
| <b>Size</b>           | Number of municipalities: 18<br>Total population of the region: 200.000<br>Population and size in km <sup>2</sup> of the different municipalities is very diverse (the smallest local community less than 500 inhabitants, then growing to the 20.000 and up to less than 100.000 inhabitants) Local communities with Nature 2000 are mostly bigger in size (km <sup>2</sup> ) but very scarcely populated. |
| <b>Structure</b>      | The cities Kranj, Škofja Loka and Jesenice are major centres in the region with important functions and services (school centres (e.g. secondary schools, faculties,...), administrative public bodies (e.g. different permits,...), health facilities,..., concentration of different branches,...)                                                                                                        |

### II Strategy and Process

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| <b>Name of strategy / instrument</b>   | Economy centre of Gorenjska region                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Objectives / focus / motivation</b> | <p>The strategy was prepared for the regional development program 2007-2013 and was upgraded in 2008-2010. It consists of;</p> <ul style="list-style-type: none"> <li>→ network of business zones (according to the concentration of branches, key connections)</li> <li>→ new technology parks (ICT, medicine)</li> <li>→ network of support incubators</li> </ul> <p>and it is strongly connected to the development of educational system in the region (connected to the knowledge needed in growing industries (e.g. ICT, materials, tourism, new technologies).</p> <p>Main goal of the strategy was;</p> <ul style="list-style-type: none"> <li>→ offering the SME.s the opportunity to grow and create added value with neighboring SME.s (including the job opportunities)</li> <li>→ determining the "land use" for economy centre</li> <li>→ finding the optimal way of financing and ownership of the support measures in the strategy</li> </ul> |

|                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Preceding process / "history"</b>      | The development was initiated by a regional development program 2007-2013. It includes discussions on different level (expert, inhabitants, local communities' experts + policy level (mayors). Important topic which was discussed in the period more than 1.5 year was of inter-municipal cooperation, that brings to the conclusions where certain zones, parks and incubators will be located including the discussion and decisions from which local communities the SME.s will be forwarded to which zone, park,... |
| <b>Duration of current process</b>        | Preparation of the development started in 2005<br>Regional studies prepared in 2007, upgraded till 2010.<br>First provision of land ready for development in 2007<br>First construction activities in business zones in 2008, while other activities (parks, incubators are still under preparation)                                                                                                                                                                                                                      |
| <b>Financial / administrative Support</b> | The initiation of the process was supported by the national ministry for self government and regional development which supported the preparation and initiation phase for zones; while parks are to be supported from other national/EU funds.                                                                                                                                                                                                                                                                           |

### III Activities

|                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|--------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Organization and financing</b>          | Organization and financing are as follows; Organization is basically on the contractual level, based on the prepared strategy.<br><br>Local communities (policy level) decide for the each priority in the strategy (when and how it will be implemented) and give consensus to each investment. For zones the financial contributions comes from national/EU level (ERDF) and local level (local communities), in some cases part of the co-financing comes from the SME.s that are investing in the zone. In some cases private "manager" is hired to work on the coordination of the development of zone (e.g. with knowledge of architecture, law...). Public money is used mostly only for the planning and development of infrastructure at the "future zone". |
| <b>Spatial planning and soil policy</b>    | The total area of the inter-municipal zones is 100 ha, which are now in different stage of development (e.g. already under construction (infrastructure (electricity, roads, water, sewage system,...) with mostly known which SME.s will enter the zone, some still in preparation of the documentation, while land is mostly publicly owned)<br>In some cases the land is already determined to be "zone" but partly still in private ownership, so the "zone" will be growing by steps (with the new purchase of land new zone areas will be available). The "infrastructure" is usually discussed with possible private investors SME-s to as much as possible get closer to the "ideas and needs" of SME.s that are going to be located in the zone.            |
| <b>Identification of supply and demand</b> | The strategy of the inter-municipal zones is mostly oriented to the supply side, although the "red line – materials, ICT...) are strongly supported.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Marketing</b>                           | The marketing is limited to the contact persons at the local communities responsible for development of the zone and sometimes some advertisement is included. There are no personnel or financial means for any additional marketing activities.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Other activities / methods</b>          | No implementation of further activities or methods.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

### IV Status Quo

|                |                                                                                                       |
|----------------|-------------------------------------------------------------------------------------------------------|
| <b>Success</b> | The success of the development is already in some "zones" visible;<br>- some zones are already "full" |
|----------------|-------------------------------------------------------------------------------------------------------|



|                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                 | <ul style="list-style-type: none"> <li>- the long term effect cannot be measured yet (e.g. consequences for local communities budget in sense of part of taxes coming from SME.s and employees in the zones, securing and growing the number of jobs, securing and growing the number of SME's with higher added value)</li> </ul>                                                                                                                                                                          |
| <b>Balancing of interests</b>   | A scheme for balancing interests with respect to balancing risks, burdens and revenues has been prepared in some zones (e.g. including the contributions and costs of SME-s entering and staying in the zone).                                                                                                                                                                                                                                                                                              |
| <b>Flexibility / commitment</b> | <p>The organizational structure is rather flexible in itself, enabling different special structure if needed and are usually used also in other development issues.</p> <p>Strategy is rather flexible since zones, parks and incubators are scattered in the whole region. Although there still bottlenecks considering "money shortage", planning issues (e.g. environmental and other issues, marketing issues).</p> <p>Due to the shortage of the "money" some "strategy" must have been postponed.</p> |



## The Ark – Regional cooperation on business development

|                            |                                                   |                       |            |
|----------------------------|---------------------------------------------------|-----------------------|------------|
| <b>Metadata / Contact:</b> | Nathalie Stumm<br>TechnoArk 3<br>CH – 3960 Sierre | <b>Date of entry:</b> | 11.11.2009 |
|----------------------------|---------------------------------------------------|-----------------------|------------|

### I Description / general information on the region

As a basis for comparing the preconditions for implementing the instrument and for transferring solutions

|                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name of region / project</b> | State of Valais - the axis Martigny-Sion-Sierre<br>Strategy « The Ark »                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Reference</b>                | Department of economy, energy and spatial development<br>Contact : Dominique Luyet<br>Tel.: 027 / 606 73 63<br>dominique.luyet@admin.vs.ch<br><a href="http://www.vs.ch/Navig/navig.asp?MenuID=17143">http://www.vs.ch/Navig/navig.asp?MenuID=17143</a>                                                                                                                                                                                                                   |
| <b>Size</b>                     | Number of municipalities: 3<br>Resident population: 55.000, total population of the canton of Valais: 300'000<br>Population of the different municipalities: Martigny 14'360, Sion 27170, Sierre 14.130<br>Area: 800 km <sup>2</sup><br>Martigny 263 km <sup>2</sup> , Sion 125 km <sup>2</sup> , Sierre 419 km <sup>2</sup> ; Total area of the canton of Valais: 5.225 km <sup>2</sup>                                                                                  |
| <b>Structure</b>                | These three cities are the main axis of the french speaking part of the state of Valais along the Rhone valley. They represent the centers for services and administration (especially in Martigny and Sion), industrial, and academic activities (especially in Sierre). People (commuters) living all around, in villages and in the lateral valleys, are working in these cities, and also buying in the commercial centers that are located in the surrounding areas. |

### II Strategy / Process

|                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name of strategy / instrument</b>   | The Ark - Regional cooperation on business development                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Activities</b>                      | Economic development (Support for start-up (coaching, facilities ...)). Territorial management (matching between economic activity and space allocation)                                                                                                                                                                                                                                                                                                                                                              |
| <b>Objectives / focus / motivation</b> | The Ark is the application of the local authorities' strategy of creating a science and technology park in the Valais. The goal of "The Ark" strategy is to diversify and stimulate the economy of the canton of Valais. It focuses on the potentials and the know-how of the different regions and promotes the development of new companies and businesses in defined sectors which are:<br><br>- Life sciences (BioArk, PhytoArk)<br><br>- Information and communication technologies sciences (TechnoArk, IdeArk) |

|                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                    | <p>- Engineering sciences (BlueArk, TeleArk)</p> <p>Incubators and accelerators allow people to bring innovation from research to the market, placing the projects in the center of networks that allow synergies.</p> <p>Innovative projects and business models are hosted in the incubators, from the very beginning of the idea up to its way to the commercialization.</p> <p>The Ark's Incubator offers professional support to start-up companies. It provides entrepreneurs with practical, appropriate support, to maximise their chances of success. It offers them professional mentoring and appropriate facilities, enabling them to improve their business plan and gather the necessary resources to accelerate their growth</p> |
| <b>Process / "history"</b>                         | <p>The canton of Valais has had for a long time an image of a region living on two main activities which were tourism and agriculture. This image was not reflecting the reality of this canton, whose economy is based, besides agriculture and tourism, also on industry, energy and services.</p> <p>Considering the strong knowledge of its workforce in highly technical branches, and its place as the second most important center of the chemical industry in Switzerland, the State of Valais started diversifying its economic make-up. In doing so, it launched the strategy The Ark, which took place approximately 8 years ago. It was implemented step by step on the different axes, the first being Life sciences.</p>          |
| <b>Outcomes / achievements</b>                     | <p>The Ark benefits the whole regions around the clusters; it brings companies on the available industrial and commercial lands, and also contributes to the venue of workers who can live in the surroundings. All the clusters are not at the same stage of their development, some of them are hosting numerous start-ups, and other ones are still in an implementation phase.</p>                                                                                                                                                                                                                                                                                                                                                          |
| <b>External financial / administrative support</b> | <p>Both Confederation and State of Valais contribute in the financing to the support of economic projects developed thanks to The Ark.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

### III Implementation

In this section it shall be described in detail and comprehensible for the "outsider", how the strategy is implemented, how the cooperation or the commercial development work, which instruments are used, how responsibilities are shared etc..

|                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Organization and financing</b> | <p>The Ark financing in 2008:</p> <p>Total: Fr. 3'274'709.-</p> <p>( 7% The Ark Found</p> <p>( 31% State of Valais</p> <p>( 13% municipalities</p> <p>( 9% Loterie romande</p> <p>( 40% Swiss Confederation</p> <p><u>Organization</u></p> <p>The Council of foundation of The Ark is constituted of the mayors of the 6 main cities of the Valais, the head of the Economic Development Office, the directors of R&amp;D of the Valais Universities of applied sciences and of the entity in charge of the management of The Ark.</p> <p>It is in charge of the strategical management and the consistency of the actions which</p> |
|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                       | <p>are undertaken by each site of The Ark.</p> <p>Each of the six sites has appointed a representative on the committee that decides the financial resources allocated to projects, in line with the strategy adopted by the Board.</p> <p>Each city involved in The Ark hosts a cluster of a different branch of activities, thus avoiding competition between sites.</p>                                                                                                                                                                                                                       |
| <b>Spatial planning and soil policy</b>                               | <p>The city in which the “cluster” is located is the owner of the spaces, buildings and facilities. The strategy for the development of each cluster is coordinated with the vision of the canton for its territorial and economic development, and supervised by the department in charge of the economy.</p> <p>The decision to expand the dedicated infrastructures to match the increasing needs is in charge of the city which hosts the cluster.</p> <p>All activities related to spatial development, on the cantonal level, are subject to a cantonal directive plan.</p>                |
| <b>Identification of supply and demand for commercial development</b> | <p>Monitoring their development, the cities in charge of a cluster have made provision of its development, and of the necessary spaces. For example, the TechnoArk, located in Sierre, started in a single building, and has had three successive extensions (in 2000, 2004 and 2008), bringing its capacity up to 15'000m<sup>2</sup>.</p> <p>The city managers are in charge of attracting the companies that are the most suitable for each site, in terms of type of activities, needs (for spaces), and size.</p>                                                                           |
| <b>Marketing</b>                                                      | <p>There is a common marketing strategy for all the clusters belonging to The Ark. The goal is to give a coherent image of a canton in which technology and know-how are promoted, focusing on high potential and high value added axes. Different supports are elaborated (website, flyers, documentation, ...)</p> <p>The economic promotion of the canton, which is in charge of exogenous promotion, is contributing to the promotion of the clusters by attracting companies active in the sectors of activity of The Ark, and proposing available land space or commercial facilities.</p> |
| <b>Other instruments / methods</b>                                    | <p>A database has been developed at the cantonal level, in order to collect information on available (for rent or sale) industrial areas and commercial spaces, their equipment, price. Only the biggest municipalities, which have a dedicated workforce for their economic development, didn't give the data related to their territory; the reason is that they want to stay able to steer the development of their municipality, choosing which type of companies they want to locate on each part of their territory.</p>                                                                   |

#### IV Review

|                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Success</b>                | <p>In 2008, 48 projects were supported by the Foundation, for a global amount of approximately CHF 3.2 millions. These 48 projects had an impact on the development of the sites, contributed to reinforce the image of the Valais in technological branches, and above all to value 11 inventions of technologies that were developed on the sites, to support the creation of 10 new companies and to initiate projects in 19 SMEs.</p> <p>One important aspect also lies in the fact that the support of projects by the Ark Foundation facilitates the access to other sources of financing.</p> |
| <b>Difficulties</b>           | <p>The main difficulty is related to the fact that the development of the different branches of The Ark (PhytoArk, BlueArk ...) depends on the involvement of municipal authorities, and due to this, all the sites are not being developed at the same speed.</p>                                                                                                                                                                                                                                                                                                                                   |
| <b>Balancing of interests</b> | <p>The balancing of interests between Canton and cities works very well, with a good co-operation. On the level of the cities, a large autonomy and a natural competition be-</p>                                                                                                                                                                                                                                                                                                                                                                                                                    |

|                   |                                                                                                                                                                                                                                               |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | tween sites explains a lighter cooperation.                                                                                                                                                                                                   |
| <b>Commitment</b> | The local and regional stakeholders are fully committed to the process, having seized the opportunity to give a new impulse to their economical development. The organization is now well established and can be built on stable foundations. |

## Phase 4: Implementation

Please also regard the Excel file "COMUNIS\_phase4\_model-calculation.xlsx" in the attachment.

## Strategic Environmental Assessment – data sheets

### I General Information

|                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                               |
|--------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| <b>Name of Instrument</b>                                                | Data sheets on Strategic Environmental Assessment (SEA)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                               |
| <b>Development / Distribution</b>                                        | Bosch & Partner GmbH, in the context of the SEA process for the preparation and adoption of the land use plan 2020+ of the city of Wolfsburg                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                               |
| <b>Source</b>                                                            | <p>BALLA S., PETERS H.-J. &amp; K. WULFERT 2010: Leitfaden zur Strategischen Umweltprüfung im Auftrag des Umweltbundesamtes. Dessau.</p> <p>BOSCH &amp; PARTNER GMBH (2010): Umweltbericht zur Neuaufstellung des Flächennutzungsplans 2020plus der Stadt Wolfsburg.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                               |
| <b>Purpose</b>                                                           | <p>Strategic Environmental Assessment (SEA) is a tool allowing the consideration of environmental aspects within planning processes. It can facilitate a proactive approach to ensuring that environmental and sustainability considerations are taken into account during early stages of strategic decision-making processes, e.g. within commercial site development.</p> <p>Using a concerted data sheet for the documentation of SEA (partial) results helps to safeguard that all relevant environmental aspects are considered, the data sheet thus may serve as a checklist. Applied within the context of commercial site development an alternatives assessment can make transparent the different impacts of alternative options for the site development. The comparison of alternatives can thus support the decision-making process.</p> |                               |
| <b>Field of activity</b><br><br>1: main purpose<br>2: secondary purposes | 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Land use management           |
|                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Promotion and Communication   |
|                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Business support and services |
|                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Other:                        |

### II Description and Contents

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>       | <p>By using data sheets all relevant facts of the assessment can be documented and summarised and made available for the decision-making process. Data sheets can be adapted to the specific assessment, i.e. the data sheets can be developed to the level of details that a specific assessment requires. If SEA is applied voluntary – like in the context of commercial site development – the assessment can be focused on the most relevant steps of SEA (cf. below: Process of implementation).</p> <p>It is not the purpose of an SEA to generate new data. Instead, information (which might include analysis as well as data) available at different sources (environment administration etc.) shall be collected and used for the assessment. Moreover, information obtained in other decision-making processes, such as plans or programmes in other sectors, like nature management plans, flood management plans, agricultural or energy plans can be used.</p> |
| <b>Detailed contents</b> | <p>The data sheet may contain the following aspects:</p> <ul style="list-style-type: none"> <li>main characteristics of the assessed site: location, size and character of use, protected sites, general description</li> <li>specific environmental objectives: details from the ecological development concept and from the landscape plan</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

|  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <ul style="list-style-type: none"> <li>• consideration of alternatives</li> <li>• findings of the baseline analysis and findings of the environmental impact analysis concerning the relevant environmental factors: population / human health, fauna / flora / biodiversity, soil, water, climate / air, landscape, cultural / material assets</li> <li>• proposals for avoidance and mitigation of adverse effects as well as compensation measures</li> <li>• monitoring measures.</li> </ul> |
|--|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### III Implementation

|                                                  |   |                                    |
|--------------------------------------------------|---|------------------------------------|
| <b>Responsible body</b>                          |   | District / regional administration |
|                                                  |   | Municipal council                  |
|                                                  | x | Municipal administration           |
|                                                  |   | External experts                   |
|                                                  |   | Other:                             |
| <b>Further persons or organizations involved</b> | x | District / regional administration |
|                                                  |   | Municipal council                  |
|                                                  | x | Municipal administration           |
|                                                  |   | Business Associations              |
|                                                  |   | SMEs                               |
|                                                  | x | Resident population                |
|                                                  | x | Other: External experts            |

|                                  |                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                              |
|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Process of implementation</b> | The following table shows an overview of the SEA process:                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                              |
|                                  | <b>Stage</b>                                                                                                                                                                                                                         | <b>Key considerations</b>                                                                                                                                                                                                                                                                                                    |
|                                  | Screening process                                                                                                                                                                                                                    | Examine aims and objectives of plan and its overall purpose. Consider whether plan is likely to have significant environmental effects. If so, SEA required.                                                                                                                                                                 |
|                                  | Scoping process                                                                                                                                                                                                                      | Consider whether plan meets requirements of relevant policies, environmental protection objectives, international targets, etc. Based on objectives of plan, identify key environmental issues central to particular plan being assessed.                                                                                    |
|                                  | Select SEA objectives/criteria                                                                                                                                                                                                       | Develop series of SEA objectives/criteria against which performance of plan will be predicted. Targets and indicators based on these criteria can be used as basis of a strategy to monitor implementation of plan.                                                                                                          |
|                                  | Consideration of alternatives                                                                                                                                                                                                        | Identify costs, benefits and environmental impacts of other realistic alternatives to meeting plan's objectives. Choice between alternatives ultimately a political decision.                                                                                                                                                |
|                                  | Collect baseline environmental data                                                                                                                                                                                                  | Target data gathering effort on issues identified during scoping. (These may change in light of new information obtained.) Provides platform to examine predicted impacts against anticipated changes in future environment without plan.                                                                                    |
|                                  | Undertake impact prediction                                                                                                                                                                                                          | Using SEA objectives and criteria as a guide identify impacts of plan policies. Predictions should be made using baseline environmental data where available. Where possible, focus on cumulative, synergistic, secondary and long term impacts to increase comprehensiveness. Involves subjective and objective assessment. |
|                                  | Undertake impact evaluation                                                                                                                                                                                                          | Consider acceptability of plan and alternatives, looking at significance of predicted environmental impacts.                                                                                                                                                                                                                 |
|                                  | Develop a mitigation strategy                                                                                                                                                                                                        | Not explicit stage, as mitigation should be considered throughout SEA process, enabling continual refinement of plan. Nevertheless, residual impacts of chosen alternative must be addressed.                                                                                                                                |
|                                  | Develop a monitoring strategy                                                                                                                                                                                                        | Relate monitoring strategy back to environmental targets and indicators identified during scoping. Consider whether plan is achieving its objectives and if mitigation measures are working effectively. Amendments to plan may result.                                                                                      |
|                                  | Prepare an environmental report                                                                                                                                                                                                      | A publicly available SEA report should be prepared to document main findings of SEA. This should include a non-technical summary.                                                                                                                                                                                            |
|                                  | Instigate a review mechanism                                                                                                                                                                                                         | Consider whether information provided by SEA and included in the SEA report is sufficient for decision making. In order to maintain objectivity, some form of independent review necessary.                                                                                                                                  |
|                                  | Consultation and public participation                                                                                                                                                                                                | Not separate stage, as relevant authorities and public should be involved at various stages during SEA. External involvement important at early SEA stages (scoping and selection of objectives/criteria), and prior to plan adoption but after impact evaluation.                                                           |
| <b>Duration / frequency</b>      | Frequency: In timely relation to the planning process of the commercial site. The environmental assessment may be further specified in the following steps of the planning and project process (EIA)<br><br>Duration: several months |                                                                                                                                                                                                                                                                                                                              |
| <b>Costs</b>                     | Costs may arise from commissioning the SEA to external experts partially or in total.                                                                                                                                                |                                                                                                                                                                                                                                                                                                                              |
| <b>Efforts</b>                   | A first effort is to be made to consolidate the relevant aspects to be considered in the assessment. The main efforts are to collect the information necessary to assess the current situation and the impacts of the project.       |                                                                                                                                                                                                                                                                                                                              |



|                                        |                                                              |
|----------------------------------------|--------------------------------------------------------------|
| <b>Spatial level of implementation</b> | Related to the territory considered in the planning process. |
|----------------------------------------|--------------------------------------------------------------|

#### IV Experiences of implementation



|                    |                                                                                                                                                                               |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reference</b>   | Marie Hanusch<br>Bosch & Partner GmbH<br>Lister Damm 1<br>30163 Hannover                                                                                                      |
| <b>Experiences</b> | The data sheets contributed to achieving a sound documentation of the possible impacts of the commercial site development and a fair assessment of several alternative sites. |

#### V Metadata / Contact:

|                                 |                                                                                              |                       |            |
|---------------------------------|----------------------------------------------------------------------------------------------|-----------------------|------------|
| <b>Author of the fact-sheet</b> | Stefan v. Andrian-Werburg<br>Bosch & Partner GmbH<br>Pettenkoferstraße 24<br>D-80336 München | <b>Date of entry:</b> | 16.02.2012 |
|---------------------------------|----------------------------------------------------------------------------------------------|-----------------------|------------|

#### VI Additional Material:

|                |           |
|----------------|-----------|
| <b>Picture</b> | See below |
|----------------|-----------|

| <b>Commercial Site – XY</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                               | <b>Nr. G 1</b>                                                                      |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| <b>Character of site</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                               |                                                                                     |
| <p><u>Location:</u><br/>North West of town XY; South of canal XY</p> <p><u>Size and character of use:</u><br/>rd. 9,4 ha commercial site</p> <p><u>Description:</u><br/>Agricultural land, bordered by two roads and a watercourse.</p> <p><u>Natura 2000 sites and other protected sites:</u><br/>Not affected</p>                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                               |   |
| <b>Specific environmental objectives</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                               |                                                                                     |
| <p><u>Details from the ecological development concept:</u><br/>Medium conflict intensity:</p> <ul style="list-style-type: none"> <li>• Proposal for a landscape protection area</li> <li>• Proposal for a biotope network</li> <li>• Proposal for mitigation measures in the Northern part</li> </ul> <p><u>Details from the landscape plan:</u></p> <ul style="list-style-type: none"> <li>• Improvement of water quality</li> <li>• Proposal for a landscape protection area</li> <li>• Key area for landscape development</li> </ul> |                                                                                                                                                                                                                                                                                                                                                                               |  |
| <b>Alternative assessment (site alternatives)</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                               |                                                                                     |
| No alternatives on this site, due to bordering land uses (traffic, watercourse)                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                               |                                                                                     |
| <b>Affected environmental factors</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                               |                                                                                     |
| <b>Population/ human health</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <u>Current state of the environment:</u> Sites without specific protection functions                                                                                                                                                                                                                                                                                          |                                                                                     |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <u>Likely impacts:</u> No significant impacts expected                                                                                                                                                                                                                                                                                                                        |                                                                                     |
| <b>Fauna/flora/biodiversity</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <p><u>Current state of the environment:</u><br/>Wide-ranging structured arable land, watercourse and forest in the South. Breeding birds on arable land including field lark, grey partridge and quail. Due to the character of the site no high population density expected. Hunting habitat for bats. Exposure to intense agricultural use and bordering traffic sites.</p> |                                                                                     |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <u>Likely impacts:</u> No significant impacts expected; possible loss of habitat for breeding birds.                                                                                                                                                                                                                                                                          |                                                                                     |
| <b>Soil</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <u>Current state of the environment:</u> Sites without specific protection functions                                                                                                                                                                                                                                                                                          |                                                                                     |

| Commercial Site – XY                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                         | Nr. G 1 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <u>Likely impacts:</u> Loss of natural soil functions                                                                                                                                                   |         |
| Water                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <u>Current state of the environment:</u><br>Ground water: Soils with little and medium binding strength of surface soil<br>Watercourses : River water quality II, medium polluted, artificial character |         |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <u>Likely impacts:</u> Impacts on the river due to durch surface drainage and sealing                                                                                                                   |         |
| Climate/ Air                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <u>Current state of the environment:</u><br>Exposure to bordering traffic sites (air pollutant / dust emission)                                                                                         |         |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <u>Likely impacts:</u> No significant impacts expected                                                                                                                                                  |         |
| Landscape                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <u>Current state of the environment:</u> Sites without specific protection functions                                                                                                                    |         |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <u>Likely impacts:</u> No significant impacts expected                                                                                                                                                  |         |
| Cultural/ material assets                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <u>Current state of the environment:</u> No listed cultural sited or material assets                                                                                                                    |         |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <u>Likely impacts:</u> No significant impacts expected                                                                                                                                                  |         |
| Proposals for avoidance and mitigation of adverse effects                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                         |         |
| Take account of an adequate distance to the river/ watercourse (riparian stripes),<br>No discharge of surface water in the river/ watercourse<br>Actions of avoidance for likely impacts on species conservation: construction period restrictions, map potential bat colonies.<br>Public bodies have to be informed about discovered contaminated deposits.                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                         |         |
| Proposals for compensation of adverse effects                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                         |         |
| Measures of advanced compensation to prognosticated impacts on species conservation: Measures to save the regional ecological functions for field birds.<br>Compensation of adverse effects is not possible in the area sufficiently (eco-account).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                         |         |
| Summarizing assessment and recommendations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                         |         |
| No environmentally relevant concerns. Legal challenges due to species protection legislation can be avoided by advanced measures of compensation.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                         |         |
| Notes on monitoring                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                         |         |
| The monitoring is carried out twice during the term of ten years. The first monitoring step is carried out for the building site after five years. Subject of monitoring is the approved and realized building. On the basis of knowledge gained from the monitoring it can be decided if a plan amendment is necessary. The second monitoring is finally carried out during the revision of the plan or the preparation of a new plan.<br>Subject of monitoring are those environmental impacts which are classified likely significant, have an uncertain forecast and which have been indicated by other authorities and the public. Moreover it is to check whether the planned actions of avoidance and mitigation are efficient. |                                                                                                                                                                                                         |         |

Bosch & Partner GmbH (2010): adapted from: Umweltbericht zur Neuaufstellung des Flächennutzungsplans 2020plus der Stadt Wolfsburg

## 1. Strategic Environmental Assessment – additional information

### 1.1. Environmental report

The environmental report is the central part for documenting the results of the environmental assessment. It also forms the main basis for monitoring the significant effects of the implementation of the plan.

The report begins with an outline of the contents, main objectives of the plan and relationship with other relevant plans and programs. Following the relevant aspects of the current state of the environment and the likely evolution thereof without implementation of the plan are described. The report also gives information on the environmental characteristics of areas likely to be significantly affected as well as any existing environmental problems which are relevant to the plan including, in particular, those relating to any areas of a particular environmental importance. In addition, the environmental protection objectives, established at international, Community or Member State level, which are relevant to the plan are presented.

The central task of the environmental report is to identify, describe and evaluate the likely significant effects on the environment of the plan and its reasonable alternatives. This covers the likely significant effects on issues such as biodiversity, population, human health, fauna, flora, soil, water, air, climatic factors, material assets, cultural heritage including architectural and archaeological heritage, landscape and the interrelationship between the above factors (Annex 1 SEA Directive). These effects should include secondary, cumulative, synergistic, short, medium and long-term permanent and temporary, positive and negative effects. The report also has to provide the measures envisaged to prevent, reduce and as fully as possible offset any significant adverse effects on the environment of implementing the plan.

Moreover the report must include an outline of the reasons for selecting the alternatives dealt with, and a description of how the assessment was undertaken including any difficulties (such as technical deficiencies or lack of know-how) encountered in compiling the required information.

Finally the measures envisaged concerning monitoring have to be described and a non-technical summary of the information has to be provided.

Tab. 1 shows an example of the structure of an environmental report.

**Tab. 1: Structure of the environmental report (German SEA-Guidance, Balla et al. 2010)**

| 1 Introduction             |                                                                                                                                                                                                                 |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.1                        | Abstract of plan/program <ul style="list-style-type: none"> <li>• Aims and rationale</li> <li>• Main contents</li> <li>• Relation to other relevant plans and programs</li> </ul>                               |
| 1.2                        | Scope of investigation <ul style="list-style-type: none"> <li>• Investigation site</li> <li>• Investigation program and data source</li> <li>• Methodological approach</li> </ul>                               |
| 1.3                        | Explanations to the planning process (procedural steps and participation)                                                                                                                                       |
| 2 Environmental objectives |                                                                                                                                                                                                                 |
| 2.1                        | Description of valid environmental objectives <ul style="list-style-type: none"> <li>• Objectives by law</li> <li>• Objectives by relevant plans and programmes</li> <li>• Other relevant objectives</li> </ul> |

- 2.2 Description how objectives / considerations are taken into account during elaboration the plan / program

### **3 Environmental characteristics, current state of environment, state of environment in case of no implementation of the plan / programme and environmental problems**

Current state of environment in the entire region  
Initial level of environmental damage in the entire region  
Expected changes of the environmental state in the entire region in case of no implementation of the plan / program

### **4 Environmental impacts (positive/ negative)**

- 4.1 Abstract of considered alternatives  
4.2 Environmental impacts of individual plan designations and the assessed alternatives  
Description of environmental impacts  
Measures of avoidance / mitigation and compensation  
Appraisal proposal  
4.3 Environmental impacts of the plan / programme in all (and the assessed alternatives, as far as it is no subject of 4.2)  
Description of environmental impacts in all  
Measures to avoid / mitigate and compensate  
Assessment proposal

### **5 Notes on difficulties at assembling the information**

### **6 Planed monitoring measures**

### **7 Generally understandable, non-technical summary**

## **1.2. Possible mitigation measures**

The following Tab. 2 presents standard measures to avoid and mitigate negative effects.

**Tab. 2: Measures to avoid and mitigate negative effects**

| <b>Measures to avoid and mitigate negative effects</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Reduction of construction sites on minimum number; appropriate use of construction vehicles and material.</li> <li>• Ban on forest destruction and cleaning: 1. March to 30. September.</li> <li>• Taking the protection of nesting places into account: 1. February to 30. September.</li> <li>• Carry out protective measures in accordance to the DIN-Norm (for example: in case of bordering, ecological sensitive areas).</li> <li>• Limitation of sealing on a minimum necessary measure.</li> <li>• Reduction of excavations, fillings and ploughing on a minimum necessary measure.</li> <li>• Clarify the groundwater conditions: no construction under middle groundwater-flood level.</li> <li>• Conservation of waters and riparian stripes or restore not natural sections.</li> <li>• Conservation of biotopes with high- and highest grade.</li> <li>• Keeping minimum distances to forest areas or to bordering, ecological sensible biotopes.</li> <li>• Priority of retention of unloaded rain in the local and bordering area.</li> <li>• Integrating new industrial areas in the landscape with local plants (for example: roof-greening, greening areas).</li> <li>• Minimizing the immission of noxious substances, particularly by carrying out an extensive cultivation of future green areas, excluding soil- and waterdamging land uses / excluding determined land uses in the development plan in sensitive areas.</li> <li>• Adapt the vertical height and density of the development as well as the arrangement and adjustment of the buildings with regard to ventilation requirements.</li> <li>• Protection of sensitive land uses by structuring the area (distance regulations...).</li> <li>• If necessary: Fixing emission-restrictions for firms or technical plants, fixing structural or other technical pre-</li> </ul> |

#### Measures to avoid and mitigate negative effects

- cautions to avoid harmful environmental impacts (for example sound isolation requirements).
- Reduce illuminated advertising in open landscapes.
  - Reduce the use of high-pressure mercury lamps to illuminate the streets.
  - Energy-optimized construction methods, construction forms and adjustment as well as environmentally friendly infrastructure (energy-supply, traffic connection)

## Phase 5: Evaluation

Please also regard the Excel file "COMUNIS\_phase5\_evaluation\_grid.xlsx" in the attachment.

