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DEVELOPMENT OF SHOPPING CENTERS IN POLAND AGAINST THE BACKGROUND OF KEY STAKEHOLDERS' REQUIREMENTS

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Abstract

Shopping centers have been a permanent element of the landscape of many Polish cities for over twenty years now. Their operation as large commercial facilities, and therefore essential elements of the urban logistics system, poses many challenges. In addition, it is related to the existence and manifestation of the requirements of their key stakeholders. The purpose of the article is to outline the process of development of shopping centers in Poland against the background of European trends, and in addition, to draw attention to the existence of various types of shopping centers, the regularities related to their operation and the expectations of their major stakeholders. The article also discusses selected latest trends affecting the current perception of shopping centers and significantly affecting the formation of requirements of the stakeholders associated with them.

Key words: shopping centers, stakeholders, modern retail spaces, city logistics

Introduction

Shopping centers appeared in Polish cities already more than twenty years ago changing the shopping habits of Poles. At the present time they are to be found not only in major metropolitan areas, but in smaller urban centers as well. Over the time they have become a specific new quality in the way of shopping and the way of spending free time, often threatening the existence of other local traders and providers of services. Furthermore, shopping centers have created new common urban spaces. Their construction has contributed to a change in the nature of certain urban quarters. At the same time increased pedestrian and road traffic can be observed around them. It should be noted that the role and perception of these facilities has been changing along with the progress of new trends. Currently an evolution of the existing or appearance of new objectives and specific activities taken by their major stakeholders can be observed. This concept should encompass several various groups of entities. Representatives of each of them have slightly different reasons and goals related to the establishment and operation of a shopping center. Important trends setting a further direction of the development of shopping centers can be observed recently. They have been outlined in the course of the considerations.

1. The issue of shopping center stakeholders

Modern cities, as extremely complex structures, are subject to constant changes. The source of these changes lies, *inter alia*, in the need for providing numerous functions for various groups of recipients on a relatively limited area. Various stakeholders with different goals and expectations (including residents, municipal authorities, retailers, service providers and manufacturers based in cities) are involved in the process. When specific investments and projects carried out in cities are analyzed, the concept of their stakeholders should be considered. A stakeholder is an entity (including, *inter alia*, a natural person, an organization, an authority) which may influence a given project or be affected by it. A type of a project with long-term consequences for the functioning of cities is the development of shopping centers. Such shopping centers comprise important retail facilities, elements of the city logistics system, integrating urban flows of goods and people. They are also a place where numerous services are provided.

In the literature of the subject the issue of stakeholders is raised in the context of different aspects of the functioning of cities and city logistics. Witkowski and Kiba-Janiak refer to this concept with respect to the process of city logistics modeling and considering the expectations of the various stakeholders (freight carriers, shippers, residents, administrators – local governments, public transport operators) in the process[1]. Taniguchi and Tamagawa analyze the measures considering the behavior of several stakeholders associated with urban freight transport (freight carriers, shippers, residents, administrators, urban expressway operators)[2]. Furthermore, Oliveira and Oliveira mention carriers, retailers, residents and administrators as major stakeholders involved in the distribution of goods, the authors study the "stakeholders' preferences and perceptions regarding city logistics schemes"[3].

An analysis of different detailed areas of city logistics allows various stakeholder groups and their various goals which may even be mutually contradicting to emerge. One of such areas is undoubtedly the establishment and functioning of concentrated retail features - shopping centers in urban areas. The process of their formation in Poland already has its own history and their further development continues to bring many challenges. The building and operation of shopping centers is a process affecting and involving various groups of actors.

Shopping centers are erected in these central points of cities which concentrate flows of pedestrian, automobile, tramway, bus or railway traffic. Consequently, the construction of shopping centers in central urban districts is a process interfering with the already existing structures (as they are constructed in the vicinity of compact urban development). Such large building structures may hinder urban functions and are bothersome for residents. According to Parteka the appearance of facilities of this type in the Polish cities is an important urban trend.

[1] J. Witkowski, M. Kiba-Janiak, *The role of stakeholders in a developing reference model of city logistics versus the quality of citizens' life*, „Logistyka" 2012, No 2, pp. 1065-1067; J. Witkowski, M. Kiba-Janiak, *Interesariusze w procesie modelowania logistyki miejskiej*, „Logistyka" 2012, No 3, pp. 28-29.

[2] E. Taniguchi, D. Tamagawa, *Evaluating city logistics measures considering the behavior of several stakeholders*, "Journal of the Eastern Asia Society for Transportation Studies", 2005, Vol. 6, pp. 3062-3076.

[3] G. F. de Oliveira, L. K. de Oliveira, *Stakeholder´s perceptions of city logistics: An exploratory study in Brazil*, "Transportation Research Procedia", 2016, No 12, pp. 339-347.

Unfortunately, in many urban centers, this process occurs in a disordered manner due to the lack of zoning in the development plans[4].

Shopping centers create increased mobility in the immediate vicinity and give rise to other transport issues. Hence, these facilities are referred to as traffic emitters[5]. The creation of urban shopping centers is also related to other general spatial, social and environmental issues. These include, among other things, the nuisance for local residents related to their operations, or the problem of eliminating smaller retailers located in their environment. There are also new challenges and factors that come into being with time, significantly affecting the shopping centers (including, *inter alia*, the development of e-commerce or ageing of the society). These trends are materialized by the behavior of various groups of stakeholders of shopping centers. Such key stakeholders[6] should include:

– owners and operators of shopping centers – seeking to position the shopping center in an attractive location; interested in creating a facility capable of facing the competition of other emerging shopping centers for a long time; having influence on the selection of tenants and the location of the commercial space rented by them in the center; trying to secure long-term lease agreements and having influence on the lease rent rates; undertaking various activities aimed at promoting and maintaining the customers of the center; striving to meet the expectations of co-financiers of the shopping center development (e.g. banks);
– tenants of retail space – expecting attractive location of a retail point in the center (in a well exposed place to be frequently visited by customers); interested in having retail premises in a shopping center that is well managed and promoted; expecting reasonable rent rates;
– municipal authorities – having influence, by way of the issued decisions and acts of local law, on both the possibility and the conditions of the shopping center location at a specific venue; cooperating to effectively connect the trading center to the municipal infrastructure (power supply, water and sewage, transport infrastructure); obligated to create urban space that is attractive and friendly for residents; having influence on the sustainable urban development;
– customers – interested in: an attractive retail offer of the shopping center and its good transport accessibility; attractive shopping center space (in architectural and functional terms) as a place to spend leisure time;
– local population – interested in: minimization of the negative externalities (including, among other things, congestion, vibration, noise) of the shopping center operation, the development of space around the shopping center, creation of jobs by the shopping center and combating social exclusion.

On the background of the considerations on the development of shopping centers, the following part of the study outlines the rationale and selected objectives guiding the activities and influencing the choices of the stakeholders of these centers.

[4] T. Parteka, *Konstruktywna i destruktywna rola transportu w kształtowaniu treści i formy miast*, „Czasopismo Techniczne. Architektura" 2010, No 3, pp. 98-99. Among the town planning phenomena leaving a mark on the municipal transport system the author includes also, *inter alia*: the development of residential housing in the suburban area burdening urban exit routes, due to the concentration of jobs and services in city centers. In addition, the existing pro-automotive approach in the urban design is indicated as a problem, which means that designers submit to the automobile transport diktat.

[5] T. Parteka, *Konstruktywna…,* op. cit., p. 107.

[6] The considerations are purposefully limited only to the most important stakeholders of shopping centers regarding the issues raised in the article.

2. Development of shopping centers in European conditions

The contemporary retail sales are made in various types of shopping facilities. Intensive development of shops and shopping complexes characterized by large space has continued in highly developed countries of the world for several decades. A significant place among them is held by shopping centers. The literature of the subject refers to their basic generations and types. The shopping centers operating in Western European countries are grouped into five generations, and four generations are indicated when referring to those developing in Poland (with shorter history)[7].

The term "shopping center" and classification of such facilities are moreover widely discussed in studies and market reports of specialized agencies and organizations analyzing the commercial retail space market . The international and domestic organizations associating operators and tenants of shopping centers - the International Council of Shopping Centers (ICSC) and the Polish Council of Shopping Centers have particularly significant achievements in this area. The basic attributes of shopping centers should be defined using a study prepared by this organization. The study indicates that a shopping center is a certain wholesome and consistent investment project, and from the point of view of the architecture, it is an integrated system with an area of at least 5 000 m^2 (GLA – gross leasable area) where an important role is played by common spaces. Shopping center tenants represent various retail specialties, nonetheless it is chain tenants that predominate. The issues of the center development, selection of tenants and marketing of the whole shopping center are managed by the shopping center operator[8].

In accordance with the terminology applied by the ICSC, in the European conditions, three basic types are distinguished for facilities known as shopping centers: traditional shopping centers, retail parks and factory outlets[9]. They are defined in Table 1.

Table 1. The definitions of the basic types of shopping centers by ICSC [10]

Type of shopping centers	Definition
Traditional (conventional) shopping center	"a retail property planned, constructed and managed as a single retail entity which consists of a shared retail area of a minimum leasable space (GLA) of 5,000 m^2 and at least 10 shops"
Retail park	"a property with a consistent design, construction and management which consists mainly of medium and large sized specialist retail facilities"

[7] Romanowska and Jamróz emphasize that individual generations reflect the changing trends in trading and thus the different form, location and characteristic features of shopping centers. The authors write about the four generations of large-space shopping facilities referring to the PhD dissertation of Sławomir Ledwoń. Cf. A. Romanowska, K. Jamróz, *Wielkopowierzchniowe obiekty handlowe – zwykłe genaratory ruchu czy źródła problemów transportowych*?, "Transport miejski i regionalny" 2015, No 2, pp. 5-6.

[8] DeLisle, James R., *Toward the Global Classification of Shopping Centers*, ICSC Research white paper, January 2009 [after:] R. Knap, B. Kozłowska, M. Migut, P. Pieńkos, W. Wojtczak, *Aktualny stan rynku centrów handlowych w Polsce* [in:] PRCH, Reatail Research Forum. Report 1st half of 2015, http://prch.org.pl/baza-wiedzy/raporty/retail-research-forum (Access on 15.11.2016), p. 6.

[9] ICSC, *The Socio-Economic Contribution of European Shopping Centres*, European Impact Study 2015, http://www.icsc.org/europe/uploads/EU_Impact_Study_(web).pdf (Access on 20.11.2015)

[10] Complementing the breakdown presented in Table 1 it should be added that due to the size, traditional shopping centers are divided into: large - more than 30,000 m^2 in area, small between 5,000-15,000 m^2 in area and other shopping centers. The same classification is applied to retail parks, dividing them into: large (more than 30,000 m^2 in area), small (5,000-15,000 m^2 in area) and other retail parks. [after:] Colliers International, *Rynek centrów handlowych w polskich aglomeracjach*, I poł. 2015, http://www.colliers.com/-/media/files/emea/poland/reports/2015/colliers-poland-retail-aglomeracje-h1-2015.pdf?la=pl-pl (Access on 15.11.2016)

Outlet center (factory outlet)	"a property with a consistent design, construction and management with separate shops in which the producers or retailers sell surplus stock end-of-line products and products from previous collections at reduced prices"

Source: own study based on: Polish Council of Shopping Centers, *Retail Research Forum*, Report H1 2014; http://prch.org.pl/baza-wiedzy/raporty/retail-research-forum (Access on 20.11.2015), p. 23; ICSC, *The Socio-Economic Contribution of European Shopping Centers*, European Impact Study 2015, http://www.icsc.org/europe/uploads/EU_Impact_Study_(web).pdf (Access on 20.11.2015)

In the European conditions it is typically urban shopping centers (located at various distances from the city center) that are observed – these are rather the above mentioned conventional shopping centers and non-urban centers, often of regional importance. Many factors contribute to the success of each of such facilities, where one of the key factors is the location. Favorable location in city centers or in selected districts of the city, with easy access to the means of transport is essential in the case of urban centers. These have to be the venues with the largest flows of people. Such location is supposed to ensure an appropriate foot fall. Location in the heart of the city center is related mostly to prestigious facilities with the appropriately selected group of tenants.

Taking into account the objectives of activities of various groups of stakeholders associated with the establishment and operation of shopping centers in a city, it should be noted that their imperatives can be either the same or often divergent. For example, operators (administrators) and tenants of shopping centers are concerned that the transport access to the shopping center should be ensured to the largest possible mass of customers. The authorities of cities, having in mind the quality of life and well understood interests of inhabitants often strive to ensure that the shopping center location should not be in conflict with the existing urban development, historic buildings and that it should ensure good access to the public transport. Customers expect a location with good transport connections and which will provide access to parking spaces in the shopping center or in its direct vicinity. Therefore, there is a problem of municipal authorities yielding to the automobile transport diktat as mentioned by Parteka[11].

An extremely important aspect, lying in the interest of the shopping center management, which affects the success of the entire shopping center, is an appropriate choice of tenants, the so called tenant mix. These are the operators of individual shops (mostly clothing or footwear retailers of known brands) and service points (including food service). It should be noted that there are certain regularities in this area, however, also here, the influence of different groups of stakeholders is observed. A fundamental factor for shopping center operators is to encourage such groups of tenants to lease shopping center spaces that have the power to attract customers and thus contribute to the foot fall. In the terminology of the industry such tenants are referred to as anchor tenants. Locating retail units next door to such anchor tenants is beneficial also for other tenants, as their shops can be visited by the passing customers. Typical anchor tenants include: Supermarket/Hypermarket, Discount, Fashion Apparel, Home Improvement/DIY, Full-Line Department Store, Entertainment, Fitness. Their importance in creating the foot fall in a shopping center changes depending on whether it is a more prestigious shopping center in the city inner area or on the outskirts of an urban agglomeration. It is indicated that the shopping center location determines the so-called anchor ratio which is usually contained in the range from 30% to 70%, where higher shares are characteristic for facilities in city centers[12]. In the case of shopping centers located closer to the city center, the space occupied by the main tenant from the FMCG industry (Supermarket/Hypermarket) usually becomes smaller. The discussed regularities also depend on where in the world the shopping center is located. The Central and

[11] T. Parteka, *Konstruktywna...,* op. cit., p. 106.
[12] Colliers International, *Tenuous Turnover. Implications of E-commerce Growth*, CEE Research&Forecast Report, Q2 2015, Retail, http://www.renews.pl/uploads/Raporty/colhandelczynsz.pdf (Access on 20.11.2016), p. 4.

Eastern Europe (CEE) market is governed by certain specific rules that are somewhat different than in the more mature retail market in Western Europe or North America. For this reason, it is worth presenting one more division (Table 2) of Shopping Centre Formats[13] taking into account these criteria.

Table 2. Traditional Shopping Centre Formats in Central and Eastern Europe

Type of schemes	Leasable area	Typical number of anchors	Typical anchor ratio (%of leasable area by anchor)	Type of anchors
Very Large	80.000 m2 and above	8+	40-70%	Supermarket/Hypermarket, Discount, Fashion Apparel, Home Improvement/DIY, Full-line Department Sore, Entertainment, Fitness
Large	40.000 – 79.999 m2	8+	40-70%	Supermarket/Hypermarket, Discount, Fashion Apparel, Home Improvement/DIY, Full-line Department Sore, Entertainment, Fitness
Medium	20.000 - 39.999 m2	5+	40-60%	Supermarket/Hypermarket, Discount, Fashion Apparel, Home Improvement/DIY
Small	5.000 – 19.999 m2	2+	30-50%	Supermarket/Hypermarket, Home Improvement/DIY
Very Small	Less than 5.000 m2	N/A	N/A	Supermarket and/or Convenience-based

Source: Colliers International, *Tenuous Turnover. Implications of E-commerce Growth*, CEE Research&Forecast Report, Q2 2015, Retail, http://www.renews.pl/uploads/Raporty/colhandelczynsz.pdf (Access on 20.11.2016), p. 4.

Nowadays customers of shopping centers show interest not only in products of recognized chain brands, but also in the offer of local manufacturers and regional products. Noticing this trend, shopping center operators more and more often lease retail space to tenants of this type (even if only small stands in the main alleys). Owing to such activities the offer of shopping centers becomes more varied, and facilities located in different cities gain a value of locality. Moreover, events for local communities, various exhibitions and charity actions are organized in many city shopping centers. Such pro-social attitude of shopping center operators is the reason why they are positively perceived by residents of cities.

Another factor influencing the modern lines of development of shopping centers are new solutions for the distribution of products and ways of shopping. One of the most important trends is the development of e-commerce. Therefore, the question may be asked: Can problems affecting traditional stores (brick-and-mortar stores) appear on the market of certain products (e.g. clothing, electronics, household appliances)? Will they be subject to marginalization, and hence elimination from trading centers and will shopping centers be also threatened for this reason? When answering this question it should be stressed that, doubtlessly, the role of traditional shops and shopping centers has to change and evolve. This process can be observed already now. With the development of e-commerce, new models of customer behavior, and thus

[13] It was introduced by Colliers International basing on the general division of the International Council of Shopping Centers, having analyzed the data on more than 1,500 commercial centers; Colliers International, *Tenuous Turnover…, op. cit.*, p. 4.

new sales channels form themselves on the market. An important trend is the development of omnichannel retail sales. Shopping centers may play an important role also in such channels. In market reports it is emphasized that already today there are various omnichannel forms, depending on which stage of the entire selection process (including exploration, testing) and purchase or possible return of the product takes place on-line and which in a traditional store[14]. At the same time, it should be noted that different types of customer behavior (purchase models) induce the varying number of their visits in a traditional shop (shopping center), which is associated with the varying number of city journeys (by means of individual or public transport or on foot – here is the role of the municipal authorities, shopping center operators and public transport operators in cities in creating solutions contributing to sustainable mobility). Table 3 shows the relationship between the number of shopping journeys and the manner of purchase of products. When answering the question whether the development of e-commerce substantially threatens the retail forms it is possible to refer to the opinions of analysts: “the rise of sophisticated omnichannel retail strategies have demonstrated conclusively that brick-and-mortar stores are integral part of the consumer experience and are as relevant now as they have ever been”[15].

Table 3. Shopping Journey: In-Store vs. Online

	Search	**Test&Trial**	**Purchase**	**Delivery**	**Return**
Single-/Multichannel	In-store	In-store	In-store	In-store	In-store
Omnichannel	On-line	In-store	In-store	In-store	In-store
Omnichannel	In-store	In-store	On-line	On-line	On-line
Single-/ Multichannel	On-line	On-line	On-line	On-line	On-line

Source: Colliers International, *Tenuous Turnover..,* op. cit., s. 5.

3. Development trends on the Polish shopping center market and requirements of shopping center stakeholders

The rapid development of the modern retail space market[16] began in Poland in the 1990s along with the influx of foreign retail chains and shopping center operators along with the accompanying modern techniques of sales or marketing. This factor caused significant changes both in the size of the retail space resources, as well as in the size structure of shops and also in the type and availability of previously widely unknown brands and goods. These activities included but were not limited to opening stores with significantly larger areas than before, thus the history of shopping centers in Poland began.

In the initial stage of development of the discussed market, shopping centers were built particularly in major Polish urban agglomerations. At this time, numerous shopping streets lost their former glory and character. Retailers with single premises in shopping streets were not able to withstand the competition of numerous professionally organized and managed retail chains. The sources of problems of owners and tenants of premises in shopping streets also included: the low technical standard of premises, complicated ownership relations of premises hindering their commercialization, restrictive regulations and requirements of historic heritage

[14] Colliers International, *Tenuous Turnover…,* op. cit., p. 5.
[15] ICSC, *The Socio-Economic...,* op. cit., p. 5.
[16] For the Polish market the modern retail stock is defined by Cushman&Wakefild analysts as “retail schemes exceeding 5000 m^2 of gross leasable area (GLA), delivered or refurbished after 1990”. Cushman&Wakefield, Property Times, *Increased market competition calls for a quick response.* Poland, Retail H1 2016, www.cushmanwakefield.com (Access on 20.11.2016), p. 7.

conservators and the lack of parking spaces for customers[17]. Therefore, many shops were liquidated there to be replaced by branch offices of banks, travel agencies, offices of mobile operators and food service establishments. For many years, municipal authorities and other stakeholders did not engage in effective efforts aimed at reviving the shopping streets and restoring their former commercial nature. In many locations, this function has been virtually lost.

The current modern retail space resources in Poland total 13.11 million m². As a result of the discussed trends, a dominant part of the space is occupied by traditional shopping centers, the number of which is 395, and they cover 9.30 million m² of retail space (71% of the market). Other formats[18] include: "retail parks and warehouses with 3.59 million m² of space (27%) and outlet centers with 0.21 million m² (2%)"[19]. Shopping centers in Poland are built in cities of various sizes, both in major metropolitan areas, as well as in smaller centers (the so-called secondary markets). In 2000 - 76% of the shopping centre space resources was still in major Polish urban agglomerations, however it was only 54% in 2016. Detailed information on this subject is presented in Figure 1.

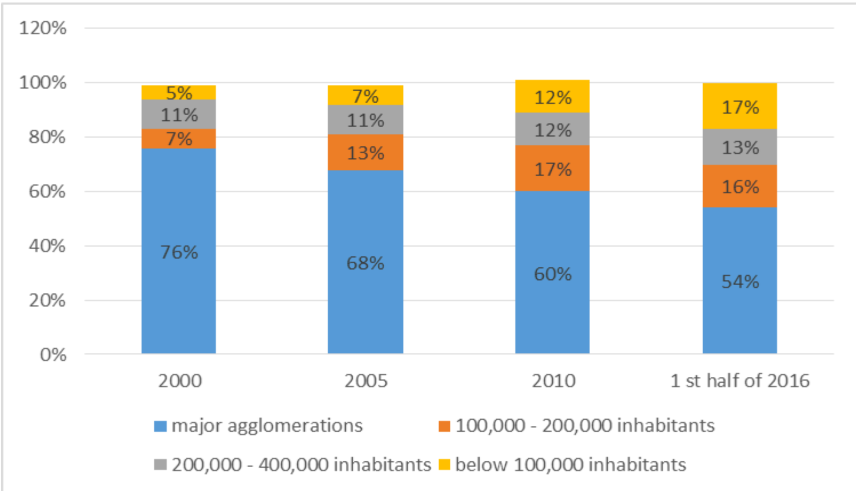

Figure 1. Distribution of the shopping center stock

Source: Cushman&Wakefield, Property Times, *Increased market competition calls for a quick response.* Poland, Retail H1 2016, www.cushmanwakefield.com (Accessed 20.11.2016), p. 2.

The fact that shopping centers are opened also in smaller urban areas is the reason why many problems and challenges related to the operation of such facilities in large agglomerations are transferred to these smaller urban areas as well. Also here the issues observed include competition created by shopping centers for smaller "non-chain" shops located, *inter alia*, at shopping streets, transport problems related to the operation of centers as generators of traffic and the activities undertaken by various stakeholders.

The socially positive perception of shopping centers is supported by creation of facilities of such type in places of former location of factories or industrial plants. In this way, urban areas are recovered to serve new features. In many cases, shopping centers are created maintaining

[17] Colliers International, *Ulice handlowe w Polsce*, Report, October 2013 http://www.colliers.com/pl-pl/poland/insights/high-streets (Access on 01.12.2014).

[18] The reports of Cushman&Wakefield mention an additional format as a "retail warehouse", i.e. a "a large scale standalone retail facility usually anchored by DIY, furniture, electronics, cash & carry and sports operators". It is indicated that in the late 1st half of 2016 they accounted for 18% of the total market resources of the modern retail space market (255 units). [after:] Cushman&Wakefield, Property Times, *Increased…*, op. cit., pp. 2 and 7.

[19] A. Tarajko-Bąk, J. Tomczyk, JLL, *Poland Retail Market*, Q3 2016, http://www.jll.pl/poland/en-gb/Research/Poland_Retail_Market_Q3_2016.pdf (Access on 20.11.2016), p. 1.

the structural elements, facades of old buildings or restored parts of buildings. Examples of such centers in Poland include but are not limited Galeria Bałtycka in Gdańsk built on the premises of a former confectionery factory called "Bałtyk" (entirely newly-built) and Galeria Wiktora in Walbrzych situated on the premises of the Wiktoria Coalmine. The best known examples of projects of such type are also Manufaktura in Łódź and Stary Browar in Poznań[20]. The creation of a shopping center in a place like this helps, as a result, to significantly increase the attractiveness of the site. It can be noticed that it is usually in the interest of both the municipal authorities, the operator and the shopping center owner (who in this way has a unique and attractive facility, although requiring higher expenditure at the project construction stage). Also customers appreciate the attractiveness of this type of buildings which are often of historic importance.

Another factor having impact on the directions of development of the shopping centers market are also the shopping habits of Poles – potential customers of shopping centers. These attitudes are also clearly evolving. Recently, it is noted that customers have started to show growing interest (*inter alia* due to a large number of hours spent at work) in making purchases in discount stores and supermarkets located closer to places of their residence, or in smaller shops located even in the ground floors of residential buildings – convenience stores. Therefore, it is observed that customers resign from shopping in more distant hypermarkets and shopping galleries associated with them. Hence, it has become necessary to improve the commercial offer of these centers[21] and often also to upgrade them.

While referring to the purchasing habits of customers, it should be also added that former habits are forced out by new ways and places of shopping. Following the Western European trends, various new retail channels are gaining in importance also in Poland. E-commerce, bio-bazaars, fashion fairs, mixed-use projects[22] should be mentioned here. This interest results, *inter alia*, from a certain change of lifestyle among members of the public. While cultivating a healthy lifestyle many people have started to make purchases in smaller health food stores, located outside shopping centers, or at local bazaars selling products of domestic manufacturers. Moreover, interest in moving by bike or even on foot has increased among many city residents. Operators of shopping centers should be also open to changes for customers of such type. Residents and customers, cultivating a healthy and "environment-friendly" lifestyle may be encouraged to perceive shopping centers positively by introducing "green" solutions to them. Such activities may find confirmation by being subjected to the process of certification. This is an important argument also for municipal authorities (for example in Szczecin, where a tax relief for the design of green buildings has been introduced[23]) which should favor environment friendly structures. Already now, 22% of all buildings (79 facilities) with green certificates in Poland are those operating in the trade sector[24].

An important phenomenon which now applies also to the Polish retail market space is the ageing of many facilities operating in this sector. It should be kept in mind that the first shopping centers in Poland were built in the 90s of the 20th century and they are over twenty years old now. In addition, at the present time, more than half of the retail space is more than 10 years old and needs upgrading. This problem pertains to many shopping centers, many of which are already reconstructed and enlarged. This phenomenon on the Polish market is significant to

[20] More on this topic also in: M. Knecht-Tarczewska, *Formalno-prawne aspekty zarządzania projektami inwestycyjnymi dotyczącymi budowy centrów handlowych*, "Zarządzanie i Finanse" 2013, No. 1, p. 311 ff.

[21] Cushman&Wakefield, Property Times, *Increased…,* op. cit., p. 4.

[22] A. Tarajko-Bąk, J. Tomczyk, JLL, *Poland Retail…, op. cit.,* p. 1.

[23] Colliers International, *Green buildings in Poland. Certification in numbers*, Warsaw 2016, http://www.colliers.com/-/media/files/emea/poland/reports/2016/colliers_green_buildings_in_poland_2016.pdf?la=en-PL (Access on 20.11.2016), p. 5.

[24] Ibidem, p. 4.

the extent that in 2015 about one-third of the supply of the retail space came from the mentioned processes of upgrading of the existing and recommercialized shopping centers[25]. It is expected that by the end of 2016 and 2017 they will account for approx. 22% and 15% of the new space volume, respectively[26].

Other factors affecting the choice (or not) of a shopping center as the place of shopping is the phenomenon of ageing population. For elderly people, access to a shopping center is troublesome due the limited possibilities of driving their own vehicles as well as the hardships related to the use of public transport (when, for example, stops are not located in sufficient proximity to the shopping center). Similar issues apply to parents with young children (also in perambulators) or people with reduced mobility. To meet the needs of customers from the mentioned groups, as well as all other people visiting the shopping center it is necessary to connect it with the public transport system in the most optimal way. These actions are in the interest of the shopping center operator and tenants, the municipal authorities and customers of the centre, as well. A very important issue, as previously mentioned, is to ensure an appropriate number of parking spaces in the shopping center. Various stakeholders have different expectations in this regard. Customers want to find a free parking space without any problems. The limits as to the number of parking spaces per 1000 m^2 of retail space are determined in Poland in studies on the conditions and directions of spatial planning for inner-city (central) areas and they are approx. 12 parking spaces per 1000 m^2 of the GLA[27].

It should be emphasized that solutions improving and rationalizing movements of goods to the shopping center (efficient deliveries not bothersome for the local population) are of common interest for owners and operators of shopping centers, tenants of commercial space, municipal authorities, providers of public transport services and cargo carriers. In this regard, the solutions applied are part of an overall concept of urban logistics, including, among other things, the use of municipal consolidation centers or night deliveries. Shopping centers are facilities with relatively limited capacities for storage of goods, and promotions and sales requiring frequent deliveries are often organized. For this reason, tenants of retail space - retail chains create, *inter alia*, distribution schedules[28]. The issues of the time of delivery of goods to and from the consolidation point to the premises of individual tenants are moreover detailed in the regulations created by shopping center operators.

In view of the growing expectations of customers, shopping centers should evolve by extending the range of provided services (older centers through upgrading) to become facilities used for spending free time. When selecting the tenants, the operators of such facilities should ensure greater participation of providers of services that have an offer related to spending free time. In the nearest future, so as not to lose customers due to the aforementioned hazards, the shopping center operators and tenants, working together, have to get prepared, even in a more well-thought-out way, to meet the expectations of various groups (differing by age) of people visiting these facilities[29].

[25] Cushman&Wakefield, MARKETBEAT, *Polish Real Estate Market Report*, Autumn 2015, http://www.cushmanwakefield.pl/pl-pl/research-and-insight/2015/marketbeat-autumn-2015/ (Access on 20.11.2016), p. 13.

[26] Cushman&Wakefield, Property Times, *Increased…,* op. cit., p. 4.

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Summary

Over the past years Poland has experienced extremely rapid development of shopping centers. This process affects various groups of key stakeholders whose expectations are very different. In view of the different requirements, the search for optimal solutions is often difficult. This is the case when choosing the location of a shopping centre, selecting the tenants or providing the facility with an optimal number of parking spaces. Moreover, new trends have been seen over the years that change the perception of this type of facilities, posing even a threat for their existence (the development of e-commerce, the fashion for local and regional products or the tendency to do the shopping in stores located closer to home). Facing these challenges, major stakeholders of shopping centers have to review their attitudes and take new initiatives and focus on mutual cooperation. It is important that shopping centers should be places fulfilling their major retail functions, bringing profit to their owners and tenants, but also above all, being friendly to customers and residents – fulfilling at the same time the objective of sustainable development.

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ROZWÓJ CENTRÓW HANDLOWYCH W POLSCE NA TLE WYMAGAŃ ICH KLUCZOWYCH INTERESARIUSZY

Streszczenie

Centra handlowe, od ponad dwudziestu już lat, stanowią trwały element krajobrazu wielu polskich miast. Ich funkcjonowanie, jako dużych obiektów handlowych a przez to istotnych elementów systemu logistyki miejskiej, rodzi wiele wyzwań. Ponadto, związane jest z istnieniem i ujawnianiem się wymagań ich kluczowych interesariuszy. Celem artykułu jest przybliżenie procesu rozwoju centrów handlowych w Polsce, na tle tendencji europejskich, dodatkowo, zwrócenie uwagi na istnienie różnych typów centrów handlowych, na prawidłowości dotyczące ich funkcjonowania i oczekiwania ich głównych interesariuszy. W artykule omówiono także wybrane, najnowsze trendy wpływające na aktualne postrzeganie centrów handlowych i istotnie wpływające na kształtowanie wymagań podmiotów z nimi związanych.

Słowa kluczowe: centra handlowe, interesariusze, nowoczesne powierzchnie handlowe, logistyka miejska

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