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254-267 **GREGOR ČOK**
DAMJAN KAVAŠ
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BUSINESS ZONES IN SLOVENIAN
AND CROATIAN ISTRIA

LOCATIONS, CAPACITY
AND DEVELOPMENT PROBLEMS

SUBJECT REVIEW
UDC 711.6(497.4/497.5 ISTR)*00"

POSLOVNE ZONE U SLOVENSKIM
I HRVATSKIM DIJELOVIMA ISTRE

LOKACIJE, KAPACITETI
I PROBLEMI RAZVOJA

PRĚLEDNI ZNANSTVENI ČLANAK
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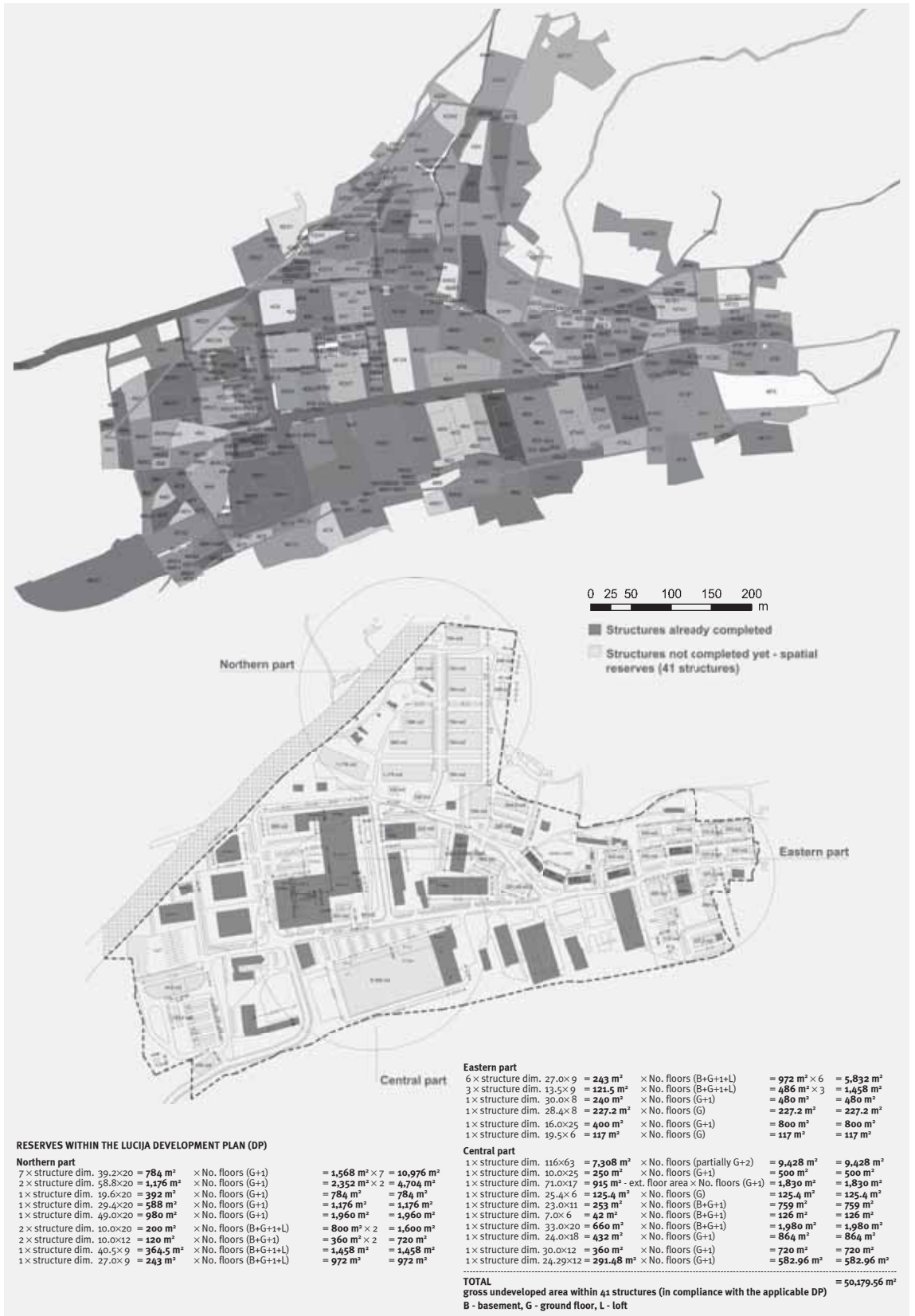


FIG. 1 "OLD" BUSINESS ZONE LUCIJA (PORTOROŽ, RS), FRAGMENTED LAND OWNERSHIP STRUCTURE (UP); ATTEMPT OF SPATIAL RESERVES CALCULATION BASED ON THE EXISTING DEVELOPMENT PLAN AND THE ACTUAL STATE ON THE GROUND (DOWN).

SL. 1. „STARA“ POSLOVNA ZONA LUCIJA (PORTOROŽ, RS), FRAGMENTIRANA STRUKTURA VLASNIŠTVA NAD ZEMLJOM (GORE). POKUŠAJ IZRAČUNA PROSTORNIH REZERVEI NA OSNOVI POSTOJEĆEG RAZVOJNOG PLANA I SADAŠNJEGA STVARNOG STANJA NA TERENU (DOLJE).

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PREGLEDNI ZNANSTVENI ČLANAK

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BUSINESS ZONES IN SLOVENIAN AND CROATIAN ISTRIA LOCATIONS, CAPACITY AND DEVELOPMENT PROBLEMS

POSLOVNE ZONE U SLOVENSKIM I HRVATSKIM DIJELOVIMA ISTRE LOKACIJE, KAPACITETI I PROBLEMI RAZVOJA

BUSINESS ZONES
CROATIAN ISTRIA
DEVELOPMENT DOCUMENTS
SLOVENIAN ISTRIA
SPATIAL CAPACITIES
SPATIAL PLANS

POSLOVNE ZONE
HRVATSKI DIO ISTRE
DOKUMENTI RAZVOJA
SLOVENSKI DIO ISTRE
PROSTORNI KAPACITETI
PROSTORNI PLANOVI

The focus of the study was business zones in Slovenian and Croatian Istria. The existing situation is characterised by a non-transparent situation as to the number, extent, and range of development areas. In the study, we used the comparative method to determine the existing situation and potential solutions for a more efficient role of zones in the concept of spatial development of Istria as a whole. We found that improvements in the fields of programmatic typology, data updating, and the management and marketing system were necessary.

Ovaj se rad bavi istraživanjem poslovnih zona u slovenskim i hrvatskim dijelovima Istre. Sadašnju situaciju karakterizira netransparentnost u pogledu broja, opsega i rasprostranjenosti razvojnih područja. Analiza je provedena usporednom metodom kako bi se utvrdila postojeća situacija i potencijalna rješenja za efikasniju ulogu tih zona u koncepciji prostornog razvoja Istre kao cjeline. Rad pokazuje da je potrebno uvesti poboljšanja u okvirima programске tipologije, ažuriranja podataka te upravljanja i marketinga.

INTRODUCTION

UVOD

The Republic of Slovenia [RS] and the Republic of Croatia [RC], as new European Union [EU] member states, want to improve their national and regional competitiveness¹ under the current socio-economic context. In this context, the attractiveness of the business environment² is one of the crucial priorities of economic and spatial development strategies. Spatial planning and design can contribute to this by directly shaping its development potential through creation of spatial conditions for the siting and placement of economic activities in an environment. By changing the national government framework after 1991, the field of spatial planning and design changed both in Slovenia and Croatia.³ The previous concept of social and spatial development, characterised by the planned socialist economy, was replaced by a sustainable development doctrine⁴, following the example of western European countries.⁵ With the creation of free market⁶ and the production of new spatial and development documents⁷, the regulation of integrating economic activities in the physical space changed⁸ both administratively and structurally.⁹ The existing industrial, small business, and similar zones¹⁰, under privatisation¹¹, have mostly undergone ownership transformation, while a wide range of small industry activities was introduced.¹²

Simultaneously, based on various planning starting points¹³, new business zones were

established.¹⁴ This trend was also evident in Slovenian¹⁵ and Croatian Istria, which can be, in the geographical, cultural, and territorial development sense, addressed as a whole [PUT-UP Istre, 2016].¹⁶

Period until 1991 – The Slovenian coastal region, which covers a small part of the Istrian Peninsula, saw intensive urbanisation in the first decades after World War II. In this period, with the development of conurbation Koper-Izola-Piran, large industrial zones were planned¹⁷, which included the metal and mechanical industry, food and the raw materials processing industry and logistics (Tomos, Cimos, Droga, Luka Koper, etc.). Politically stimulated economy and spatial planning¹⁸ provided jobs for an integrated development concept of the South Primorska region. Similarly to the Slovenian Primorska region, a similar situation, but to a greater degree, was found in Croatian Istria until 1991. Industrial development, which started as early as the 18th century, was intensive¹⁹ up until the dissolution of the Austro-Hungarian Monarchy.²⁰ During the post-war urbanisation (after 1950) the development of the coastal zone was re-intensified (Pula – shipbuilding, Umag – cement works, Rovinj – tobacco factory, etc.) – as well as that of its inland territory (Pazin – textile industry) where, in comparison to the Slovenian transport hinterland, the transport network is more densely branched out. With the declaration of independence in 1991, land use became legitimately established in the spatial plans of municipalities/towns in both countries, including the major development reserves.²¹

Period after 1991 – development of a network of business zones – After 1991 only

1 CLARK, MOONEN, 2013

2 KUSI, et al., 2011

3 DIMITROVSKA ANDREWS, PLOSTAINER, 2000

4 REPIĆ VOGELNIK, DIMITROVSKA ANDREWS, 1993-1995

5 *** 1999a [ESDP – European Spatial Development Perspective]

6 DUNNING, 1993

7 RAVBAR, 2005

8 In this context, the content structure of documents did not change considerably, while the quality of socio-economic programmes (particularly in less developed areas) as the starting points for preparation of planning documents decreased.

9 SITAR, et al., 2002

10 ČOK, 2004

11 Ownership restructuring of social companies started already in the Socialist Federal Republic of Yugoslavia [SFRY] with the adoption of *Zakon o podjetjih*, 1988.

12 This was sometimes accompanied by the total abolishment of industrial zones and quick transformation of their intended use (trade, business, administrative, residential, etc.).

13 National development programmes, reallocation of the existing business operation, environmental and real-estate motivations, etc.

14 ZRINUSIĆ, 2011

some zones managed to preserve their mono-cultural focus, while many zones changed their intended purpose due to privatisation, restructuring and bankruptcies.²² The production in some zones partially or completely ceased, in abandoned buildings or on rehabilitated land the activities of trade and storage were most commonly introduced.²³ In the second half of the 1990s, due to the "uncontrollable economic development", both countries started to promote the development of their economies. Despite the many incentives, only few investments (domestic or foreign) were implemented. In RS, one of the main obstacles was land availability, project documentation production, and the acquisition of the permits necessary; thus RS used financial resources to boost the development of business zones. RC took the same measures.²⁴ The construction of a countrywide business zone network started in 2004 with the adoption of the national "programme of business zone development".²⁵ In this process, the role of the "former" zones was somewhat neglected, which despite their problems (ownership, availability, obsolete infrastructure, etc.) represent a specific development potential.²⁶

Locational factors and the theory of business zone planning – In both theory and practice, the planning of business zones is carried out on the basis of various starting points and objectives. Site-specific factors, which are in principle of economic and spatial character, are of fundamental importance in determining the placing of a business zone. Their selection is based on location theories trying to explain the spatial distribution of specific spatial phenomena and facts. The development

of this theoretical approach dates back to the 19th century when Von Thünen (1826) constructed the location rent theory; later Weber (1909) introduced the location analysis. The central-place theory was introduced by Christaller (1933) and Lösch (1940); Isard (1956), the founder of regional science, and Henderson (1974), who developed the urban systems theory²⁷, also played important roles. The location of an "economic activity" can be analysed from a partial perspective (i.e. site-specific – microeconomic approach) or from the perspective of the economy as a whole (i.e. macroeconomic approach).²⁸

The location theory underwent various phases. At the beginning, transport costs played a determining role, which gradually decreased with the construction of new infrastructures. This led to a more efficient labour migration (commuting) and the decrease in labour costs, so secondary location factors became important in site selection, particularly the proximity of markets and suppliers. Over the past twenty years, tertiary location factors have become important, such as government policies, institutional framework, knowledge centres, information and communication infrastructure, quality and mentality of labour force, environmental aspects, representative business locations, and quality of living environment.²⁹

A detailed examination of industrial location factors was prepared by Badri (2007), who identified the following factors: transportation infrastructure, labour force structure, accessibility of markets, site characteristics (size, cost, space for future expansion, management), utilities, government attitude, tax structure, climate, and appropriate community (research and educational institutions, primary and secondary schools, hospitals, libraries, shops, hotels, banks, recreational facilities). A very similar set of the factors affecting location decisions was prepared by MacCarthy and Atthirawong (2003), who particularly emphasized accessibility to suppliers, the market, and competition. Location factors change over time and are not the same for all activities, while their significance is greatly affected by the development of technology and globalisation.³⁰ Also in the planning of zones "sometimes in practice" other factors are also considered, such as: interest of real property investments, opportunity to produce new design and planning documents (definition of potential locations in advance), implementation of local business incentives, etc., which are hard to justify theoretically.

The problem and a hypothesis – Nowadays, spatial capacities and conditions for the placement of economic activities in Istria are highly diverse. In the Slovenian part, these

15 The establishment of new zones in the Slovenian coastal region (contrary to the rest of Slovenia) was mostly restricted by spatial possibilities [KAVAS, KOMAN, 2015].

16 <http://put-up-istre.eu/>

17 KRALJ PAVLOVEC, 1999

18 VRISER, 1978

19 Particularly in the second half of the 19th century in settlements along the railway line and in coastal towns, particularly Rovinj and the war port of Pula.

20 FERENCIC, 2005

21 This is a remnant of socialism, spatial heritage of the industrialisation development model which is, to this day, logically transferred to the new generation of spatial plans [BALAZIC, 2006].

22 GABRIJELČIĆ, et al., 2016

23 On the other hand, in the coastal zone some industries stayed in their traditional locations (e.g.. small fish processing facilities, cement works in Umag, quarries in Novigrad).

24 ZIMMERMANN, MARTINEC, 2016

25 CINI, VARGA, 2009

26 LONČAR, 2008

27 KRUGMAN, 1998: 9

28 KUŠAR, 2008: 38

29 ASSINK, GROENENDIJK, 2009: 3

30 ČOK, 2004

are zones that result from previous plans³¹, while in Croatia a network of various types of zones has been developed, i.e. a blend of old and new zones.³² In the Slovenian part, there is a deficit³³ in the number of locations and the scope of the available areas³⁴, while in Croatia there is a large surplus.³⁵ In both cases, the situation regarding the spatial plan production and the supply market of "development business areas and buildings" is non-transparent.³⁶ Even though, from a land area perspective, the zones are precisely determined in spatial plans, their "usability and availability" are difficult to define.³⁷ In this framework, the following research questions are important:

1. What are the form and scope of zones in Slovenian and Croatian Istria and what are their common characteristics and differences?
2. Are the zones, in their current form, an efficient instrument for steering and encouraging spatial and economic development?

Based on this, the following hypothesis was developed: There are many zones and they are extensive; however in their current "spatial, typological, and administrative form" they are not an efficient enough planning instrument for regulating spatial and economic development.

MATERIALS AND METHODS

MATERIJALI I METODE

Methodology – The study was directed at assessing the existing situation and designing the guidelines for increasing the efficiency of zones as a regulatory instrument. It was implemented in three phases. In the first phase we used the descriptive method for data collection and analysis. In the second phase we used a comparison method which allowed for a systematic comparison of textual, tabular, and graphical data of both countries. In the third phase, conclusions were drawn and the guidelines to improve the existing situation were proposed.

– In the first phase we defined the potential sources for data collection. These were the following: professional municipal services (spatial plans and expert studies), archives, web, and libraries. The materials and other information were obtained based on two assumed criteria:

1. Spatial criterion: area of Istria (separately RC: 41 local self-governance units – JLSs)³⁸ and RS: 4 coastal municipalities;
2. Programmatic criterion: area of industrial, business, small business and other types of zones which allow for spatial placement of economic activities in the physical space.

– In the second phase we analysed the interim results and defined seven key areas al-

lowing for (inter-state) comparison of the existing situation:

1. legal framework for planning and design of existing and new business zones (*descriptive comparison of the provisions in RS and RC documents*);
2. typological definitions of zones (*descriptive designation of the individual zones in RS and RC documents*);
3. development incentives and financing instruments encouraging the development of business zones (*descriptive comparison of financing programmes*);
4. locations and capacities: existing and envisaged new zones (*visual comparison of graphical sheets of zoned land use in a scale of 1:5,000 and 1:25,000 and the comparison of numerical data. The zones were analysed on the basis of 11 basic spatial and economic parameters for determination of development potential.*);
5. reliability and ownership;
6. marketing and promotion;
7. advantages and disadvantages.

– In the third phase, conclusions were drawn and the guidelines to amend the existing situation were proposed.

RESULTS

REZULTATI

Development material and data – The wide range of the material obtained was selected and classified into the following groups: 1. strategic spatial development documents³⁹, 2. spatial development plans – regional level⁴⁰, 3. spatial development plans – local level⁴¹, 4. expert studies for drafting of plans⁴², 5. web applications, 6. other references (profes-

³¹ KAVAŠ, KOMAN, 2015

³² *** 2002a; *** 2013d

³³ CERIN, 2015

³⁴ PLAZAR MLAKAR, et al., 2007; ČOK, et al., 2007; KAVAŠ, KOMAN, 2015

³⁵ *** 2014

³⁶ Based on the findings of expert studies and overviews of business zones in relevant web portals, <http://web-hosting-wmd.hr/poslovne-zone/>; <http://zone.mingorp.hr/>; <http://www.ida.hr/index.php?id=28>; <http://www.invest-slovenia.org>

³⁷ The zones should have a more significant role in steering economic and spatial development [KOMAN, et al., 2012]. In the regulatory sense, they are an element [KOMAN, KAVAŠ, 2008] of the business environment (state, regions, municipalities) as they promote the setting up of businesses (access to land, municipal, transport, and other infrastructure, procedures and permits connected to the start of operation, etc.). In this context the different demographic potential [KAVAŠ, et al., 2013] and employment trends in the Slovenian and Croatian parts of Istria as well as tourism as the central business activity must be taken into consideration.

³⁸ JLSs – local self-governance units; within the Istarska županija area we analysed 41 JLSs.

sional and scientific journals, expertise, etc.). In the next step, the data were categorised, according to content, into five groups: data on zone locations, size, ownership, infrastructure, manner of financing, and marketing.

We found that the "technical data" (zone location and size) are consistently provided for in existing spatial documents, while other "content and development data" (availability, equipment, marketing, etc.) are far less available (i.e. absent for most zones). They are partially covered in professional bases for preparing the new generation of plans (RS: for municipal spatial plans (OPNs), RC: for county plans), while some are available online.

SCOPE OF COMPARISON

OBUHVAAT USPOREDBE

- Legal framework for planning and design of existing and new business zones – By comparing the individual parts of spatial acts we found the following:

- The two countries have comparable spatial legislation, national and local planning levels, and planning documents (strategic and implementing).

- Contrary to RC, RS currently still lacks the "regional planning level" as the optimal spatial framework for strategic planning of the network of various types of zones.

- Currently, not all municipalities in Slovenian Istria have spatial plans in place (OPNs), but rather many times amended plans from 1985 are used, which preserve the long-established zoned land use. These plans lack an adequately defined zone typology and data updating system.

39 RS: *** 2004b; RC: *** 1997, *** 1999b, *** 2015b

40 RS: *** 2006a, *** 2006b, *** 2013e; RC: *** 1969, *** 2002b, *** 2015a

41 RS: Spatial plans of the municipalities: Koper (***) 2001, Izola (***) 2004a), Piran (***) 2004c); OPN drafts: Izola (***) 2013c) and Piran (***) 2010); RC: Spatial plans of the municipalities/towns: Buje-Buie / Novigrad-Cittanova / Umag-Umago / Brtonigla-Verteneglio / Buzet / Grozňjan-Grisňnan / Lanišce / Oprtalj-Portole (amendments).

42 RS: evidence base for municipal OPNs of Koper, Izola, and Piran; RC: *** 2013a, *** 2013b, *** 2014

43 In this paper, neither agricultural land nor areas of mineral resources, which also represent an economic activity, are taken into consideration.

44 Through the: *** 2013d – 15 strategic zones obtained the status of priority zones based on the existing spatial planning documents, previous infrastructure, and available labour force in the area. In the mean time, due to increased entrepreneurial activities and needs, the number of zones increased to 34. These zones take up an area of 1,200 ha, but over 290 million HRK should be invested in their equipment and completion. So far, 168 million HRK has been invested in the implementation of this programme in Istarska županija (VAJDIĆ, 2014).

– In the Croatian part of Istria in the period 2003-2015 spatial development plans were adopted for all 41 JLSs (10 towns and 31 municipalities). The planning and design of zones in JLSs follow the goals of the County Plan (outside settlements), while inside the areas their own development strategies are implemented.

- **Typological zone definitions** – In RS's and RC's spatial plans, zones⁴³ appear in various forms and under various names (Table I). In principle, there are two options available:

1. zones in traditional locations (the plans before 1991), which preserve their planning names (areas zoned for industry, small businesses, storage, logistics, and mixed use);

2. new zones that express their "business character" in their name (the same planning definition of zoned land use applies).

Even though zoned land use is provided for in the plans of both countries, in practice there are great discrepancies between zone names and their programmes (particularly in old zones, e.g. zone of municipal industries Koper, where nowadays commercial and business services prevail).

- **Development incentives – programmes and financial instruments encouraging the development of business zones** – RS and RC both see an important development potential in their business zones. Thus, RS decided to financially support the establishment of new zones from the following resources: PHARE funds, Direct Regional Incentives (until 2004), the Single Programming Document of the RS 2004-2006 (construction of 21 zones), and the Operational Programme of Strengthening Regional Development Potentials 2007-2013: Coastal municipalities did not make a full use of the available financial resources, with the exception of co-financing of the Small-Business and Development Zone of Srmin.

RC started to finance this project more intensively by adopting the national Business Zone Development Programme in 2004. Later the Programme Promoting Small and Medium Entrepreneurship 2008–2012 was adopted, and in 2013, the Improvement of Business Infrastructure Act was adopted. In line with the state programme, Istarska županija started constructing business zones as early as 2002, when the Long-term Programme for Promotion and Development of Business Zones in Istarska županija was adopted. 105 zones in an area of 1,544 ha were provided for in spatial plans. There were no public investments in 58 zones (21 active and 37 non-active ones), while 35 zones were developed from the existing infrastructure.⁴⁴

Due to the lack of analyses and evaluations it is difficult to assess the success and effec-

TABLE I TYPOLOGICAL DEFINITIONS OF ZONES IN RS AND RC (A COMPARISON)

TABL. I. TIPOLOŠKE DEFINICIJE ZONA U REPUBLICI SLOVENIJI I REPUBLICI HRVATSKOJ (USPOREDBA)

RS

- Even though spatial legislation lacks an obligatorily defined term, the term *gospodarska cona* has been established in strategic development documents and the literature.* Two other terms are used, i.e. *poslovna* and *poslovno-proizvodna cona*, designated to define mixed-use areas.

- The zones in the Slovenian part of Istria generally preserve the designation determined by zoned land use in the spatial plan where in practice the name of the implementing spatial planning document [PIA] is used which regulates the area, or geographical designation (e.g. industrial area + "geographical designation", such as: Cimos Area, Tomos Area, Lama Area, etc.). This applies to both old and new zones.

- Zone areas are not normatively defined.

RC

- In the County Plan "business zones" are defined by indicating their business or production purpose: (a) business zone – business purpose, (b) business zone – production purpose, and (c) business zone – exploitation field (these zones are excluded from our analysis).

Nevertheless, the zones preserve their geographical designation in their name (e.g. business zone Vodnjan).

- In locations inside towns zoned land use is defined in terms of their (a) production purpose (mostly industrial or mostly small businesses) or (b) business purpose (mostly services, trade, and municipal services).

- Similarly, zone areas are defined in JLS spatial development documents; in size they are divided into micro zones (up to 10 ha), small zones (from 10 to 50 ha), medium zones (from 50 to 100 ha), and large zones (larger than 100 ha).

* According to the Companies Act, a business zone (Slovenian: *gospodarska cona*) is defined as a synthesis, i.e. umbrella term, covering all zones where companies operate, regardless of the scale, ownership, or industry [Čok, 2004].

TABLE II SLOVENIAN PART OF ISTRIA: PARAMETERS OF EXISTING ZONES (A TOTAL OF 14)

TABL. II. SLOVENSKI DIO ISTRE: PARAMETRI POSTOJEĆIH ZONA (UKUPNO 14)

Zones in Slovenian Istria – basic parameters for development potential determination

Spatial parameters								Economic parameters			
Name of zone	Period of construction <i>Old – before 1991</i> <i>New – after 1991</i>	Spatial document <i>Type/Yes/No</i>	Size <i>ha</i>	Reserved land <i>ha</i>	Level of municipal services <i>Yes/No/Partly</i>	Possibility of expansion <i>Yes/No</i>	Direct Transport link <i>(up to 2 km)</i> <i>to AC, HC, R1, G1,</i>	Price <i>EUR/m²</i>	Joint management and marketing <i>Yes/No</i>	Enterprises in zone <i>Yes/No</i>	Implementation <i>Completed/In Progress/Stagnation</i>
City Municipality of Koper											
1. Zone of municipal industry	Old	PUP	21.8 ha	No	Yes	No	HC	-	No	Yes	Completed
2. TOMOS	Old (+ new development)	PUP, (partially ZN)	22.7 ha	No	Yes	No	R1	-	No	Yes	In Progress
3. Ob Šmarski	Old	ZN ob Šmarski	3.5 ha	No	Partly	No	R1	145	No	Yes	Completed
4. Cimos	Old	PUP	9.1 ha	1 ha	Yes	Yes	R1	-	No	Yes	Completed
5. Small-business zone Salara	Old	PUP	2.5 ha	No	Yes	Yes	R1	-	No	Yes	Completed
6. Vinakoper	Old	PUP	3.5 ha	0.3 ha	Partly	No	HC	-	No	Yes	Completed
7. Small-business and development zone Srmin	Old + new	PUP, OPPN	48 ha	26.8 ha	Partly	No	AC	70	Yes	Yes	Partly Completed
8. Construction zone Srmin	Old	ZN	19.5 ha	Entire zone: 19.5 ha	No	No	G1	-	No	No	Stagnation
9. Lama	Old	PUP	15.8 ha	3.8 ha	Partly	No	AC	-	No	Yes	In Progress
10. Industrial zone Iplas	Old	PUP	38.8 ha	24 ha	Partly	No	AC	-	No	Yes	Partly Completed
Municipality of Izola											
11. Business zone Izola Delamaris	Old + new	PUP	3.7 ha	No	Partly	No	G1	-	No	No	Completed
12. Industrial zone Izola	Old	Various ZNs	21 ha	No	Yes	No	HC	150-280	No	Yes	Completed
13. Industrial zone CMI-vzhod Izola	New	OPPN	6.1 ha	n/a	Partly	No	HC	-	No	Yes	In Progress
Municipality of Piran											
14. Small-business zone Lucija	Old	ZN	18.7 ha	5.8 ha	Partly	No	G1	144-200	No	Yes	Partly Completed
All zones in total:			234.7 ha	81.2 ha							

AC – motorway, HC – expressway, R1 – regional road, G1 – main road

tiveness of these incentives, with the exception of the report "Izvršje o obavljenoj reviziji učinkovitosti osnivanja i ulaganja u opremanje i razvoj poduzetnickih zona", which assessed the establishment of business zones as ineffective. Zones were planned and/or established without analysing the actual needs, particularly based on development programmes and real-estate interests (Državni ured za reviziju, 2014). For Slovenia, too (and Slovenian Istria – with only one zone established), it is difficult to assess the degree of efficiency of these measures.⁴⁵

• **Locations and capacities: existing planning areas, reserves, and predicted new zones** – By analysing and comparing the existing applicable spatial documents and the documents in preparation, we defined, for the whole Istria, the basic parameters of the existing and envisaged business zones.⁴⁶ The parameters (for determining development potential) are summarised according to the "Criteria for Categorising Business Zones in Preparation of Strategic Spatial Documents" (PhD dissertation, Čok, 2004).

In the analytical sense, the zones in the Croatian part of Istria can be divided into (a) those provided by the County Plan (with a defined zone status), and (b) all other "industrial,

etc., areas, zones" inside settlements, as provided for by spatial plans of JLSs. Due to the lack of data (unavailability, absence, distinct diversity between zoned and actual land use, etc.) this group is not covered in our analysis. In this context our focus was on the County Plan (the current County Spatial Plan (2002), draft of a new plan (public unveiling in 2015), and audit report)⁴⁷, which actually define the "zones" as completed spatial entities with a known programmatic direction, and for the Slovenian part, on the existing spatial plans of three coastal municipalities (Koper, Izola, Piran).⁴⁸ The detailed analysis for the Croatian part addressed 34 priority locations (out of 91 envisaged, presenting a blend of new and old zones), while for the Slovenian part we addressed all 14 locations (of mostly old zones), which the municipal

⁴⁵ The success of establishment/operation of zones in both countries is also affected by unfavourable business conditions, since on the IMD Competitiveness Yearbook for 2016 Slovenia was ranked 43rd (improving from the 49th place in 2015), and Croatia was in the 58th place (the 58th place in 2015) among the 61 countries included in the ranking [IMD, 2016].

⁴⁶ We did not include the zones of exploitation fields and areas (zones) inside settlements into the analysis of the Croatian part. On the other hand, Luka Koper (Port of Koper) and areas of mineral resources were not included into the analysis of the Slovenian part. These areas were

spatial plans (with different names) define as business zones (Fig. 2). In defining spatial reserves (RS and RC) in the individual zones, this parameter could not be reliably defined in many cases due to the absence, non-availability, and diversity of data. We found the following:

– Slovenian part of Istria: All zones (except for one) were planned already before 1991 (Table II). The transport accessibility of all zones is good; their infrastructure is also good, and not in conflict with the narrow and wider environment, with the exception of the Iplas industrial zone. Most zones are completely developed, and all are located in the coastal zone (up to 3 km from the water line). By considering any of the set of location criteria to define the zones according to their meaning in RS (e.g. Čok, 2004) we find that by the criterion of size (zones of national (100 ha), regional (30-50 ha) and local significance (5-30 ha)) there are only 2 zones of regional significance in the area of Slovenian Istria and no zones of national significance. Other zones have local character.

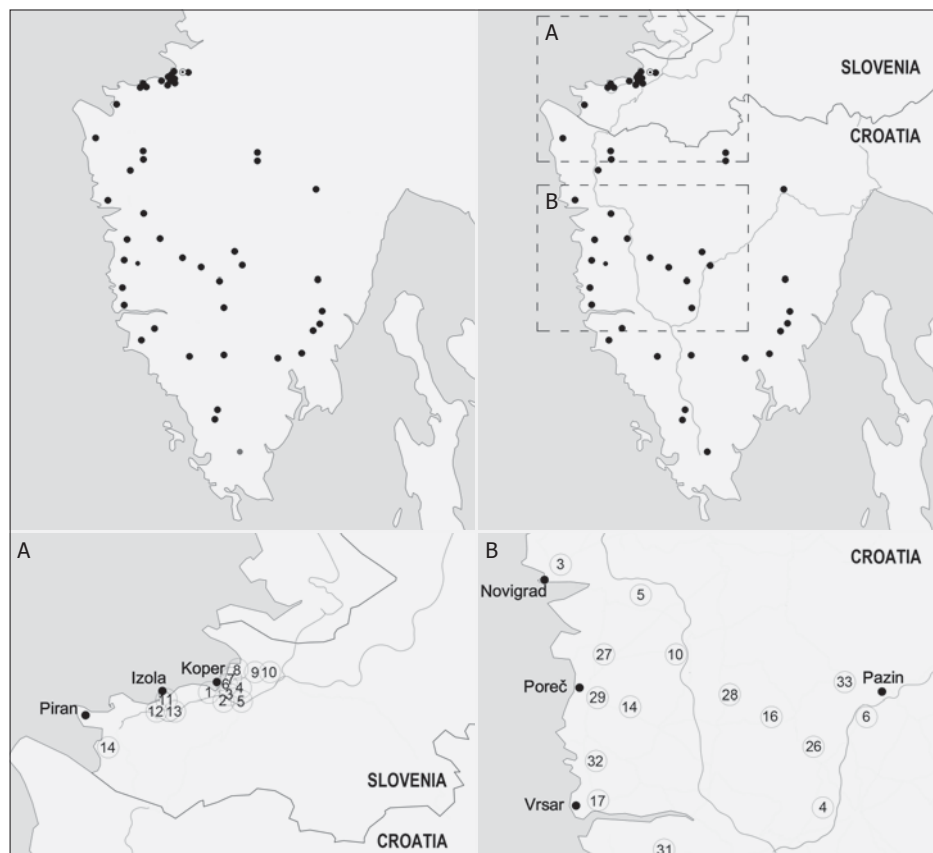
– Croatian part of Istria: The zones are distributed both in the coastal zone and the interior. Industry, as a result of previous plans, is located directly along the coastal line, while new zones are mostly not located in the narrow coastal zone. According to spatial development plans of JLS, in 2013 there were 52 entrepreneurial zones with approx. 6,400 employed persons, while 53 zones were not in operation yet (with an area of 668 ha). Because of this the number of zones was reduced to 91 locations in the new spatial plan of Istarska županija. Of this, zones larger than 4 ha cover 2,242 ha (existing and planned, but built in only 26%) and zones smaller than 4 ha cover 325 ha, or 2,567 ha in total. Besides, spatial regulation plans of JLSs of towns and municipalities can plan additional zones and livestock farms, while the total allowed area of business zones (completed, under construction, or completely empty areas) in all (41) JLSs can cover a maximum area of 2,852 ha. Analysis of the existing documents of spatial development of JLSs reveals that the areas planned for the industry and services were over-dimensioned or that they were planned before the last great economic,

excluded from the analysis because of: a) unavailability of absence of data, b) because they represent a specific spatial situation (not in the context of zone network).

47 In this framework we also addressed the existing spatial development plans of the key JLSs which cover these zones.

48 We found that no zones existed in the fourth coastal municipality, i.e. Ankaran.

49 This was also found in the report: *** 2014 which provides 14 recommendations for increasing the efficiency of zone development.



demographic, and social crisis.⁴⁹ Table III shows 34 priority zones in Croatia Istria.

In view of the above, we found that the current draft of the new spatial plan of Istarska županija provides for a maximum of 91 business zones with a maximum area of 2,567 ha, while in the Slovenian part of Istria there are 14 business zones with an area of 234.7 ha.

• **Availability and ownership** – Due to the lack of data, the definition of spatial and ownership situation in the existing zones represents a major analytical problem. For the Slovenian part of Istria, expert studies for OPNs were done for all zones, which showed that the spatial reserves within the existing zones are minimum (or completely lacking), and that the "potential of land availability" is, in fact, difficult to define (Fig. 1). Active (old) zones (in RS and RC) are faced with complex ownership situations, non-digitalised maps, and vague regulatory conditions (areas covered by area specific building code (PUP), based on which it is difficult to define the extent of the potential new construction (quota in m²). The situation is more transparent in locations that recently saw the adoption of municipal detailed spatial plans (OPPNS) providing for a rational plot division. This is mostly the case with new zones in the Croatian part of Istria.

FIG. 2 DISTRIBUTION OF THE STUDY ZONES IN ISTRIA. PRACTICALLY ALL ZONES IN THE SLOVENIAN PART ARE LOCATED IN THE COASTAL ZONE, WHILE IN THE CROATIAN PART THEY ARE LOCATED BOTH ALONG THE COAST AND FURTHER INLAND.

SL. 2. RASPODJELA ANALIZIRANIH ZONA U ISTRI. GOTOVO SVE ZONE U SLOVENSKOM DIJELU SMJEŠTENE SU U PRIOBALNOM PODRUČJU, DOK SU U HRVATSKOME DIJELU SMJEŠTENE PODJEDNAKO UZ OBALU, ALI I U ZALEĐU.

TABLE III CROATIAN PART OF ISTRIA: PARAMETERS OF 34 PRIORITY ZONES OUT OF THE 91 ZONES ENVISAGED IN THE CURRENT DRAFT OF THE COUNTY PLAN [DATA SYNTHESIS: *** 2013D; *** 2014; HTTP://WWW.IDA.HR/, 2016].

TABL. III. HRVATSKI DIO ISTRE: PARAMETRI 34 PRIORITETNE ZONE OD UKUPNO 91 PREDVIDENE U SADAŠNEM NACRTU PLANA ŽUPANIJE [DATA SYNTHESIS: *** 2013D; *** 2014; HTTP://WWW.IDA.HR/, 2016].

Zones in Croatian Istria – basic parameters for development potential determination

Spatial parameters									Economic parameters			
Location	Name of zone	Period of construction <i>Old – before 1991 New – after 1991</i>	Spatial document <i>Type/Yes/No</i>	Size <i>ha</i>	Reserved land <i>ha Yes (ha) Yes (no exact data available)</i>	Level of municipal services <i>Yes/No/Partly</i>	Possibility of expansion <i>Yes/No Not available (n/a)</i>	Direct Transport link <i>(up to 2 km) to AC, HC, R1, G1,</i>	Price <i>EUR/m2 Not available (n/a)</i>	Joint management and marketing <i>Yes/No</i>	Enterprises in zone <i>Yes/No</i>	Implementation <i>Completed/ In Progress/ Stagnation</i>
1. Town of Vodnjan	Galizana	New	Yes	18.5	Yes	Yes	53.5	AC, R1	40	Yes	Yes	Completed
2. Town of Labin	Vinež	New	Yes	20	Yes	Yes	Yes	R1	25	Yes	Yes	Completed
3. Town of Novigrad	Vidal	New	Yes	10.4	Yes	Yes	Yes	R1	n/a	No	Yes	Completed
4. Municipality of Žminj	Žminj	New	Yes	26	Yes	Partly	n/a	AC, R1	n/a	No	Yes	Completed
5. Municipality of Kastelir Labinci	Labinci	New	Yes	15.7	Yes	Partly	Yes	R1	30	Yes	Yes	Completed
6. Town of Pazin	Ciburi	New	Yes	18.9	Yes	Partly	n/a	AC, R1	n/a	Yes	Yes	Completed
7. Municipality of Svetvinčenat	Bibici	New	Yes	17.0	Yes	Partly	n/a	R1	n/a	No	Yes	Completed
8. Town of Buzet	Mazinjica	New	Yes	28.0	Yes	Partly	n/a	R1	n/a	No	Yes	Completed
9. Municipality of Lupoglav	Lupoglav	New	Yes	90	Yes	Partly	n/a	R1	n/a	No	No	In progress
10. Municipality of Višnjan	Milanezi	New	Yes	21.4	Yes	Partly	n/a	AC, R1	n/a	Yes	Yes	In progress
11. Town of Buzet	Mala Huba 1 and 2	New	Yes	15	Yes	Partly	n/a	R1	n/a	No	Yes	In progress
12. Town of Rovinj	Gripole Spine	New	Yes	60	Yes	Partly	n/a	R1	n/a	Yes	Yes	Completed
13. Town of Buje	Buje	New	Yes	2.5	Yes	Yes	n/a	R1	n/a	Yes	Yes	Completed
14. Town of Poreč	Buici - Zbandaj	New	Yes	90	Yes	Yes	n/a	R1	50	Yes	Yes	Completed
15. Town of Umag	Ungarija	New	Yes	29.5	Yes	Partly	n/a	R1	n/a	Yes	Yes	Completed
16. Municipality of Tinjan	Butori	New	Yes	3.4	Yes	No	n/a	R1	n/a	No	No	In progress
17. Municipality of Vrsar	Neon	New	Yes	7.5	Yes	Partly	n/a	R1	n/a	No	Yes	In progress
18. Municipality of Barban	Barban	New	Yes	23.0	Yes	Partly	n/a	R1	n/a	Yes	Yes	In progress
19. Town of Vodnjan	Tison	New	Yes	378.0	Yes	No	n/a	AC, R1	40	Yes	No	In progress
20. Municipality of Liznjan	Aerodrom Pula	New	No	-	-	-	-	AC, R1	-	-	-	In progress
21. Municipality of Raša	Raša	New	Yes	200	Yes	Partly	n/a	R1	n/a	No	No	In progress
22. Municipality of Pican	Potpican	New	Yes	120	Yes	Partly	n/a	R1	n/a	No	Yes	Completed
23. Municipality of Brtonigla	Štrpe	New	Yes	4.5	Yes	No	n/a	AC, R1	36	Yes	No	In progress
24. Municipality of Sv. Nedelja	Nedescina	New	Yes	8.0	Yes	No	n/a	R1	n/a	No	No	In progress
25. Municipality of Bale	Monkastel	New	Yes	3.0	Yes	No	n/a	R1	n/a	No	No	In progress
26. Municipality of Sv. Petar u Sumi	Škripelj	New	Yes	13.8	Yes	Partly	n/a	R1	n/a	No	Yes	In progress
27. Town of Poreč	Kukci	New	Yes	3.9	Yes	Partly	n/a	R1	n/a	No	No	In progress
28. Town of Poreč	Baderna	New	Yes	17.75	Yes	No	n/a	R1	n/a	No	No	In progress
29. Town of Poreč	Facinka	New	Yes	23.73	Yes	Yes	n/a	R1	n/a	No	No	In progress
30. Town of Buje	Mazurija	New	Yes	8.3	Yes	No	n/a	R1	n/a	Yes	Yes	In progress
31. Town of Rovinj	Rovinjско selo	New	Yes	2.4	Yes	Partly	n/a	R1	n/a	Yes	Yes	In progress
32. Municipality of Funtana	Funtana	New	Yes	3.9	Yes	No	n/a	R1	n/a	No	No	In progress
33. Town of Pazin	Podberam	New	Yes	7.6	Yes (3.6)	Partly	n/a	R1	n/a	Yes	Yes	In progress
34. Municipality of Sv. Nedelja	Dubrova	New	Yes	8.0	Yes	No	n/a	R1	n/a	No	No	In progress
A total of 34 priority zones				1,300 ha								

AC – motorway, HC – expressway, R1 – regional road, G1 – main road

The problems that aggravate the definition of "reserves and availability" relate to absence and non-availability of information on:

- current sale/purchase procedures of land and/or structures within a zone (ownership interests);
- already issued building permits and intent to build (role of administrative units);
- available municipal infrastructure on land and condition thereof (obsolete, new, in need of remediation, etc.);
- municipal spatial development visions concerning the zone as a whole and the intention to change implementing spatial planning documents (PIAs) (role of municipalities, change of zoned land use or building conditions);
- intention for (short-term or long-term) removal of a certain entrepreneur from the zone.

The following quota of available land can be defined based on the data available:

- in the Slovenian part we identified approx. 81 ha of undeveloped land within 14 zones;
- in the Croatian part we identified 210 ha of land available for sale (source: Audit Report) to which zones that are not yet built must be added.

In both cases, due to the aforementioned reasons, it is difficult to consider this quota as an actual development reserve.

• **Promotion in marketing** – Within the analysis, we compared audit reports and web portals. We found that the business zones in Slovenian Istria lack both appropriate management and marketing. The only organisation that "markets" the zones is the Public Agency of the Republic of Slovenia for promotion of entrepreneurship, internationalisation, foreign investment, and technology (SPIRIT Slovenija), whose database contains 5 zones from the Slovenian Istria, but the information is highly deficient. Unlike some other areas, the Regional Development Agency (RCR Koper) is not active in the field of marketing business zones, while the activity of municipalities is also limited.

Marketing and promotion are limited in Croatia, too, as the Ministry of Economy, which promotes foreign investment in Croatia, does not mention business zones⁵⁰; some zones are marketed by the Investments and Competition Agency (two from Istarska županija). Promotion and marketing activities are limited to the county level (IDA)⁵¹; however, this approach is limited and incomplete.⁵² Some

⁵⁰ <http://www.mingo.hr/page/kategorija/investicije>

⁵¹ <http://www.ida.hr/index.php?id=28>

⁵² Non-operational www.Istriainvest.com, activities at LinkedIn, YouTube, Facebook

TABLE IV ZONES IN SLOVENIAN AND CROATIAN ISTRIA: ANALYSIS OF ADVANTAGES AND DISADVANTAGES OF THE EXISTING SITUATION

TABL. IV. ZONE U SLOVENSKIM I HRVATSKIM DIJELOVIMA ISTRE: ANALIZA PREDNOSTI I NEDOSTATAKA POSTOJEĆE SITUACIJE

	RS	RC
Parameter	Advantages	Advantages
1. Old/new	<ul style="list-style-type: none"> • Prevalence of old zones. • The locations are not in conflict with the narrow or broad environment (exception of Kemiplas) – the activities in the locations are already established. 	<ul style="list-style-type: none"> • New zones prevail; the County Plan provides for many zones that can be activated when the need arises.
2. Spatial document	<ul style="list-style-type: none"> • All zones have PIAs in place; the amendments of the existing documents can implement modern and rational urban planning and architectural solutions 	<ul style="list-style-type: none"> • As these are mostly new developments (new PIAs) modern and rational urban and architectural solutions can be achieved
3. Size	<ul style="list-style-type: none"> • No advantages identified 	<ul style="list-style-type: none"> • Some zones are large, and allow for major investment.
4. Reserved land	<ul style="list-style-type: none"> • No advantages identified 	<ul style="list-style-type: none"> • Due to the low degree of zone realisation there are major reserves both in plans and in space
5. Level of municipal services	<ul style="list-style-type: none"> • Most zones are built on developed land 	<ul style="list-style-type: none"> • Many zones are well equipped
6. Possibility of expansion	<ul style="list-style-type: none"> • No advantages identified 	<ul style="list-style-type: none"> • The expansion allows for long-term operation even with the possible growth of companies
7. Transport	<ul style="list-style-type: none"> • All locations are accessible 	
8. Price	<ul style="list-style-type: none"> • No advantages identified 	<ul style="list-style-type: none"> • More favourable prices than in Slovenia
9. Management	<ul style="list-style-type: none"> • No advantages identified 	<ul style="list-style-type: none"> • No advantages identified
10. Enterprises in zone	<ul style="list-style-type: none"> • Most zones are active (except for one) 	<ul style="list-style-type: none"> • No advantages identified
11. Implementation	<ul style="list-style-type: none"> • No advantages identified 	<ul style="list-style-type: none"> • They allow for a fast occupation
Parameter	Disadvantages	Disadvantages
1. Old/new	<ul style="list-style-type: none"> • In most zones, the inclusion of major actors is not possible 	<ul style="list-style-type: none"> • New zones are not yet intensively (spatially and economically) integrated in the local environment
2. Spatial document	<ul style="list-style-type: none"> • Regulatory provisions for architectural design of buildings in the zone are very vague, which is reflected in the diverse (and even uncontrollable) image of the built structure (obsolete documents). 	<ul style="list-style-type: none"> • No disadvantages identified
3. Size	<ul style="list-style-type: none"> • The average zone size is relatively small 	<ul style="list-style-type: none"> • Overdimensioning of the zone network (the analytically estimated realised construction of business zones of all sizes is only 20–50%)
4. Reserved land	<ul style="list-style-type: none"> • Spatial reserves within the existing zones are minimum and/or not available, 	<ul style="list-style-type: none"> • Over-dimensioning of zones does not comply with the sustainable principles of rational management of space as a limited resource
5. Level of municipal services	<ul style="list-style-type: none"> • The existing infrastructure in most zones has become obsolete and/or there is no data available 	<ul style="list-style-type: none"> • No disadvantages identified
6. Possibility of expansion	<ul style="list-style-type: none"> • No possibility of expansion in most locations 	<ul style="list-style-type: none"> • No disadvantages identified
7. Transport	<ul style="list-style-type: none"> • Zones in the immediate vicinity of urban centres cause traffic load to the local transport network 	
8. Price	<ul style="list-style-type: none"> • Location of zones in the coastal zone raises land prices up to a degree that the prices are unacceptable to many entrepreneurs (except for trade and high value-added activities), 	<ul style="list-style-type: none"> • No disadvantages identified
9. Management	<ul style="list-style-type: none"> • The zones lack a common manager and efficient promotion in the real-estate market 	
10. Enterprises in zone	<ul style="list-style-type: none"> • There is a great programmatic diversity in almost all zones (problem of incompatibility) 	<ul style="list-style-type: none"> • There are no, or few, enterprises in many zones.
11. Implementation	<ul style="list-style-type: none"> • No disadvantages identified 	<ul style="list-style-type: none"> • Some zones were not planned according to the actual needs so their implementation cannot be expected in the future either.



FIG. 3 "NEW ZONE" MALA HUBA 2 (BUZET, RC), AS A TYPICAL CASE OF A PLANNED, BUT CURRENTLY STILL UNEXPLOITED DEVELOPMENT AREA

SL. 3. „NOVA ZONA“ MALA HUBA 2 (BUZET, RH), KARAKTERISTIČAN PRIMJER PLANIRANOGA, NO TRENUTAČNO JOŠ NEISKORIŠTENOG POTENCIJALA RAZVOJA

FIG. 4 "OLD ZONE" LUCIJA (PORTOROŽ, RS), AS A TYPICAL CASE OF A DEVELOPED AREA

SL. 4. „STARÁ ZONA“ LUCIJA (PORTOROŽ, RS), KARAKTERISTIČAN PRIMJER RAZVIJENOGA PODRUČJA



of the local self-governance units manage to actively market their own zones.

• **Development advantages and disadvantages** – Based on the systematisation, analysis, and comparison of all data we identified the advantages and disadvantages of the existing situation (Table IV). The zones in RS and RC vary substantially in size and territorial dispersion, which is the key advantage of the situation in RC. Despite the extensive planning areas, in practice these zones are not recognised as an actual development capacity. In RS, the key advantage is their already established integration with the local environment and infrastructure, while the level of availability and the high price of land is the biggest shortcoming (Fig. 3, 4).

DISCUSSION

DISKUSIJA

The zones in Istria are, in some cases only, an efficient instrument for steering spatial and economic development. These are the locations that from the spatial perspective allow for a fast, simple, and competitive establishment of business of a specific enterprise. At the same time, they are recognised on the market and in spatial documents as the adequate spatial capacity with a specific reserve for the introduction of new, and expansion of the existing, companies. In the Slovenian part only one zone falls into this category, while for the Croatian part, at least 34 zones have been identified as potentially efficient locations, i.e. priority zones.

In this study we found that the locations and the scope of the individual zones are derived from: (a) former socialist plans and (b) (very) ambitiously set new development strategies. The key disadvantage aggravating the "role of zones" as a regulatory instrument is that old zones deal with "saturation and problems related to ownership and municipal infrastructure", while with new ones, there is a lack of reliable data on availability and development needs. We found that the key difference between the zones in the Slovenian and Croatian parts of Istria is mostly in their scope

(number and size: RC still has major capacities, while RS has minimum capacities); therefore the current situation in implementation of development strategies in RS and RC varies a lot. A common characteristic of all zones is the obvious lack of various data and the absence of an efficient system of their promotion and marketing.

In line with this, the first part of the hypothesis set at the beginning that the zones "in their current form are not an efficient enough spatial planning instrument for steering spatial and economic development" can be fully confirmed. The hypothesis is only partially confirmed for the Croatian part, as the existing capacities of spatial policy (despite the lack of data on specific zones) allow for steering of economy in various locations. The second part of the hypothesis, i.e. that zones "are not an efficient instrument for steering economic development", cannot be either fully confirmed nor fully rejected due to the lack of data on the connection between the location of enterprises and the "institute of zones" as development locations (for both countries).

Our position is that the planning of locations and the production of PIAs are, nevertheless, only some of the necessary conditions (beside appropriate typological direction, land prices, organised ownership, municipal services, labour force, etc.) to start the actual economic development of a zone. In this sense it may justifiably be brought into question whether there is a sufficient business interest and demographic potential to fill such a large number of planned zones. Internal competition exists between regions/counties, where due to the prices of land (Slovenian Istria) and labour force (Croatian Istria), the regions are among the most competitive regions in the context of the state, particularly in terms of production activities, for both domestic and foreign investors.

For the zones to become more efficient, the following elements should be also included in the planning and design system in Istria (in both countries):

1. Efficient monitoring and system for data updating ((a) status of land/structure availability: phase of operation, sale and expansion reserves; (b) short-term company tendencies: further business, expansion, migration etc.).
2. The single typology of zones (expressing the content and scope) and the strategy for

⁵³ Croatia already has the regional scale of planning in place, Slovenia does not.

⁵⁴ This guidance concerns the updating of the national legislation in both countries.

construction of the zone network in terms of programmes and timetables, which should be integrated in the wider regional scale.⁵³

3. Zone promotion and marketing system (the current SPIRIT/IDA lacks the necessary data and there are no permanent zone promotion activities in connection to regional/local development actors).

4. Zone management and administration system (similar to the zones in neighbouring countries; Italy, Austria, etc.).

5. A more integrated approach to plan preparation, planning, and implementation (individually named and defined mandatory expert studies, durability date of PIAs, durability date of zoned land use, etc.).⁵⁴

6. In the planning of new, and reanimation of existing zones, a reliable cost-benefit analysis should be produced.

7. Observing the principle of rationality (the planning of new zones must be rational; until the general economic and social conditions improve the activation of new locations can be only a "theoretical" planning measure.

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ABBREVIATIONS

KRATICE

- ZN – Development Plan
 PUP – Area Specific Building Code
 OPPN – Municipal Detailed Spatial Plan
 OPN – Municipal Spatial Plan
 PIA – Implementing Spatial Planning Document

ILLUSTRATION AND TABLE SOURCES

IZVORI ILUSTRACIJA I TABLICA

- FIG. 1 ČOK, et al., 2007
 FIG. 2, 3, 4 Authors
 TABLES I-IV Authors

ACKNOWLEDGMENT

PRIZNANJE

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SUMMARY

SAŽETAK

POSLOVNE ZONE U SLOVENSКИM I HRVATSKIM DIJELOVIMA ISTRE

LOKACIJE, KAPACITETI I PROBLEMI RAZVOJA

Republika Slovenija [RS] i Republika Hrvatska [RH], kao nove države članice Europske unije, zainteresirane su za poboljšanje svoje nacionalne i regionalne konkurentnosti. U tom kontekstu, privlačnost poslovnoga okruženja predstavlja jedan od ključnih prioriteta u sklopu strategije ekonomskoga i prostornoga razvoja. Formiranjem novih država nakon 1991. u obje je došlo i do promjena u području prostornog planiranja i projektiranja, te posljedično i u području regulative s obzirom na izbor lokacija i smještaja gospodarskih aktivnosti u fizičkom prostoru. U doba privatizacije došlo je do velikih promjena u strukturi vlasništva nad postojećim industrijskim, trgovačkim i sličnim zonama, dok je istovremeno uveden niz manjih industrijskih aktivnosti. Istovremeno su na temelju različitih strategija razvoja nastale i nove poslovne zone. Taj je trend osobito dosao do izražaja u slovenskim i hrvatskim dijelovima Istre, koju treba tretirati kao cjelinu u pogledu geografskoga, kulturnoga i teritorijalnoga razvoja [PUT-UP Istre, 2016.]. Danas u Istri postoje raznovrsni prostorni kapaciteti i uvjeti za smještaj gospodarskih aktivnosti. U slovenskome dijelu to su zasebne industrijske i obrtničke zone iz prethodnih planova, dok se u hrvatskome dijelu razvila čitava mreža različitih vrsta zona, tj. sivojersna mješavina starih i novih zona. U slovenskome dijelu nema dovoljno lokacija i obuhvata dostupnih područja, dok je to u hrvatskome dijelu upravo obrnuto, tj. radi se o višku istoga. U oba je slučaja stanje na tržištu nekretnina, kao i u programima razvoja, relativno netransparentno, tako da Istra kao cjelovita regija ima teškoca kako bi postala konkurentna u odnosu na zone u širem internacionalnom kontekstu. Iako su područja tih zona precizno određena prostornim planovima, njihovu je 'iskoristivost i dostupnost' teško definirati. To je posljedica nedostatka podataka o namjeni i korištenju zemljišta, uvjetima poslovanja, općinskoj infrastrukturi, neodređenoj tipologiji programa itd. U tome kontekstu treba potražiti odgovor na sljedeće pitanje: mogu li zone u Istri, u stanju u kakvome trenutačno jesu, učinkovito pridonijeti upravljanju i poticanju prostornoga i gospodarskoga razvitka?

Ovo je istraživanje provedeno u tri etape. U prvoj je etapi primijenjena opisna metoda kako bi se definirali potencijalni izvori za dobivanje podataka. U drugoj je etapi na temelju usporedne metode izvršena analiza privremenih rezultata i definirano je sedam područja na temelju kojih se provela usporedba između dviju država: 1) zakonodavni okvir planiranja i projektiranja postojećih i novih zona, 2) definicije tipova zona, 3) poticajne mjere razvoja, 4) lokacije i kapaciteti, 5) dostupnost i vlasništvo, 6) marketing i promocija, 7) prednosti i nedostaci razvoja. U trećoj su etapi izvedeni zaključci i predložene smjernice za poboljšanje postojećega stanja.

Analiza je pokazala da obje države imaju usporedivo prostorno zakonodavstvo na nacionalnoj i lokalnoj razini planiranja te odgovarajuću plansku dokumentaciju. Za razliku od Republike Hrvatske, u Republici Sloveniji još uvijek nedostaje razina 'regionalnoga planiranja' kao optimalnoga prostornog okvira za planiranje mreže različitih tipova zona. U objema državama zone u prostornim planovima postoje u različitim oblicima i pod različitim nazivima. U načelu one se mogu svrstati u dvije skupine: 1) zone na tradicionalnim lokacijama (u planovima prije 1991.) koje su označene tradicionalnim nazivima (zone za industrijsku, obrtničku, skladišnu namjenu, kao i zone mješovite namjene, tj. industrijske, trgovačke itd. zone), te 2) novonastale zone koje već u svojim nazivima nose oznaku svojega poslovnog identiteta (tzv. poslovne zone, zone poslovanja i usluga itd.).

U pogledu poticajnih mjera razvoja obje su države u prošlosti investirale u razvoj zona iz različitih izvora. Zbog nedostatka analiza i procjena teško je procijeniti uspjeh i učinkovitost ovih poticajnih mjera, iako valja naglasiti da je to planirani iznos namijenjen povećanju razvojnoga potencijala prostora.

S obzirom na lokacije i njihove kapacitete izvršena je analiza općinskih prostornih planova za područje slovenskoga dijela, dok je za područje hrvatskoga dijela analiziran postojeći plan za Županiju, nacrt novoga plana (2015.) i izvještaj Državnog ureda za reviziju. Pokazalo se da nacrt novoga prostornog plana Istarske županije predviđa najviše 91 zonu s maksimalnom površinom od 2567

hektara (samo 26% kapaciteta), dok u slovenskome dijelu Istre postojeći planovi imaju 14 poslovnih zona s površinom od 214 hektara. Sve se slovenske zone nalaze u priobalnom pojasu i bile su planirane (osim jedne) već i prije 1991. godine. Mreža hrvatskih zona mješavina je starih i novih zona – kako u priobalnom području tako i u unutrašnjosti.

Definicija 'postojeće situacije' u zoni velik je analitički problem za autore planova zbog nedostatka brojnih podataka (o vlasništvu, stupnju realizacije, općinskoj infrastrukturi, planovima kompanija da presele svoje poslovanje negdje drugdje itd.). Na temelju dostupnih informacija moguće je definirati sljedeće udjele dostupnih zemljišta: u Republici Sloveniji postoji otprilike 84 hektara neizgrađenog zemljišta unutar 14 zona, dok je u Republici Hrvatskoj to 210 hektara 'zemljišta za prodaju', u što nisu uključene mnoge zone kojih realizacija još nije ni počela. U oba je slučaja, zbog prethodno iznesenih razloga, teško ove udjele smatrati stvarnom razvojnom rezervom.

Danas su zone u Istri učinkovito sredstvo upravljanja prostornim i gospodarskim razvojem samo u nekim slučajevima. To su lokacije koje, iz prostorno-planske perspektive, omogućavaju brzo, jednostavno i konkurentno poslovanje nekoga poduzeca. U slovenskome dijelu samo jedna zona ulazi u tu kategoriju, dok su u hrvatskome dijelu identificirane 34 lokacije kao potencijalno uspješne, tj. zone prioriteta. Lokacije identificirane tijekom izrade planske i projektne dokumentacije ipak su tek neki od potrebnih uvjeta za realizaciju neke zone, što utječe na razvoj pripadajućega lokalnog i/ili regionalnog okoliša. Da bi zone mogle postati efikasnije sredstvo planiranja, sljedeći elementi trebaju također biti uključeni u sustav planiranja i projektiranja (u objema zemljama): 1) učinkovit sustav nadgledanja i ažuriranja podataka, 2) jedinstvena tipologija zona, 3) sustav promocije i marketinga, 4) sustav upravljanja i administriranja zonom (vodeci računa o prethodno spomenutim elementima i sljedeći primjere dobre prakse iz drugih zemalja), 5) sveobuhvatniji pristup pripremi, planiranju i implementaciji planova, 6) princip racionalnosti (širi prostorni, demografski i ekonomski pokazatelji).

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