

## WINNERS AND LOSERS IN THE TRANSFORMATION OF CITY CENTRE RETAILING IN EAST CENTRAL EUROPE

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### Summary

In the 1990s, retail networks were transformed dramatically in East Central European countries. This paper focuses on the transition of the inner spaces of Czech and Hungarian cities that has been accelerated by large-scale retail investments that formed new foci for retailing, differentiated city centre shopping facilities and changed the frequency, direction and length of shopping trips. In this way, new dimensions of social inequality emerged within cities. The differentiation process rests on the capacity for adaptation to changes in the retail network and shopping behaviour, which correlates strongly with the social status of shoppers. The changes are also put in the context of urban/regional planning which, to date, has not articulated adequate answers to emerging social and land use conflicts.

**KEY WORDS** ★ East Central European consumerism ★ social differentiation ★ urban space

The socio-economic and political transition of East Central Europe occurred in a period when Western societies were experiencing a phase of 'postmodern consumerism'. Since the late 1970s, occupational changes have been translated into class formation by the volume, structure, and pattern of consumption, which have been significantly influenced by taste and aesthetic changes. Consumers' choices are being shaped by the constant flow of information transmitted by the electronic media. In this way, new models for consumption are being formed that provide a basis for self and group-identification (Knox, 1991).

In Harvey's views, such trends are stimulated by the immanent logic of 'late' or 'advanced' capitalism, that creates new needs and seeks to increase profitability (Harvey, 1989). However, competition generated new processes that are particular to late capitalism such as increasing commodification and globalization of commodity exchange. The former

covers all aspects of human activities, including culture that is 'rooted and embedded in everyday life' (Harvey, 1989: 299), and is closely linked to the circulation of capital. Through the integration of art into consumption, and the globalization of the spread of information and goods, a mosaic of market niches and new forms of local cultures is produced (Jackson, 1999). The primary arenas for these processes are major cities, which are nets of 'constitutive relationships among class, culture and space' (Knox, 1991: 182), and therefore provide socio-cultural variety and a wide (international) spectrum of commodities to satisfy particular (and everyday) needs: for example, the proliferation of theme parks.

However, a review of the historical aspects of consumption leads to questioning of the supposedly dramatic shift to postmodern consumerism. There is evidence that models of consumption have been shaped by social interactions and have contributed to the formation of individual and class identities over the last three centuries. However, the aesthetic character of consumption, the enormous influence of the media and the increasing attention to self-actualization can be considered to constitute particular features of late capitalism (Glennie and Thrift, 1992; 1996).

The debate over postmodern consumerism has attracted particular attention among East Central European social scientists. In the centrally planned system, there were severe constraints on individual needs in the 'economy of shortage' (Kornai, 1980). However, the mass-consumption of convenience goods and durables spread through the entire 'socialist' society from the mid-1970s.<sup>1</sup> Before the transition, qualitative and structural rather than quantitative aspects of shortage characterized the East Central European economies,<sup>2</sup> and reduced social differentiation. However, national economic policies (particularly, the licensing of small private businesses) in Poland and Hungary accelerated the emergence of a new class of relatively well-off consumers who could afford to shop in expensive private boutiques.

In the early 1990s, most of the regulations and institutions of the centrally planned system were abandoned, the public sector was transformed and privatized, domestic prices and foreign trade were liberalized, and hundreds of thousands of new enterprises were established in Hungary. A substantial proportion (almost 40 percent) of the

latter were new agents in a retail sector which was subject to heavy competition. Meanwhile, the emerging markets were hit by high inflation rates, increasing unemployment and the declining performances of national economies. Consequently, the majority of households suffered declining incomes that accelerated social differentiation and growing regional and rural/urban disparities. Similar trends were in course in Poland and Czechoslovakia (as it then was in the early 1990s), although the latter witnessed a slower transition and less startling social differentiation.

The dramatic changes in social status did not end in the late 1990s, which was a period of economic stabilization and growth. Rather, the formation of new classes is a continuing process in the countries discussed. However, the recovery in prosperity in the emerging markets attracted international agents of retailing and distribution to the region as this fitted their corporate strategies (Wrigley and Lowe, 1996; Weijers and Janssen, 1997; Dawson and Burns, 1998). Their entry and expansion stimulated new trends in domestic markets, such as a decline in small businesses, capital concentration and spatial centralization.

The hypothesis set out in this paper rests on the historical disruption of the transformation of consumption (1947/49) and the exclusion of the agents of 'capitalist' economies in the economy of shortage, resulting in a relatively homogenous society in terms of consumption. It is contended that changes in the 1990s shocked East Central European consumers who had to adapt to what previously had been a barely conceivable transformation of shopping facilities, make choices in the face of a massive increase in new types of goods, develop 'resistance' to the flow of advertisements, and become accustomed to the commodification of things that had never hitherto been considered as 'goods'. Such challenges significantly differentiated urban societies and the 'use' of urban space.

This paper focuses on the social impact of the changes in the emerging markets, such as the adaptation of consumers to changing facilities and the increasing role of consumption in social differentiation, in terms of status and access to goods and retail services. Such trends will be placed in the context of the transformation of urban space that was largely stimulated by the agents of the retail sector, and also by the planning authorities of local

communities. First, the spatial transition of cities is discussed in general terms and with particular regard to retailing in Hungary, Poland and the Czech Republic. In the following section, the winners and losers of the structural and spatial transition are considered. Our findings rest on empirical studies undertaken in Prague, Budapest and Debrecen, a major provincial town in East Hungary. Finally, we state some conclusions concerning the re-evaluation of urban space and future trends in urban society.

### Urban space formation: emerging real estate markets and retail developments

In the centrally planned system, the transformation of urban space was controlled by land use and building regulations defined by town planning authorities. However, as a consequence of structural deficiencies in the housing sector, a 'secondary market' emerged which resulted in socio-spatial differentiation in the socialist system. The rise of the 'second economy' (that is, private businesses running shops or providing services) in Poland and Hungary differentiated local societies in terms of status and living conditions in the 1980s. Urban space was increasingly a mosaic of private/public activities and diverging social classes. City centres, and rehabilitated traditional residential areas, were highly valued but also differentiated functionally and socially in the 1980s (Csanádi and Ladányi, 1992; Lichtenberger et al., 1994).

In the transition period, the range of agents driving the overall transformation of urban space changed dramatically, as a consequence of the liberalization of real estate markets. The retail sector played a significant part in the process, pushing up prices in the commercial segment of the real estate market. In the early 1990s, the transformation of city centres, hubs and axes of transportation, and industrial districts were functionally differentiated, mainly by domestic enterprises. In the late 1990s, a new structure was imposed on the largely differentiated space of urban retail networks that was characterized by increasing investment, the addition of new, extensive and homogenous elements to the existing structure, and the acceleration of functional change in entire streets/districts (Nagy, 1999b).

Such processes were underway, but to a varying extent, in all the East Central European countries and cities, as national policies, urban planning and local regulations had a significant role in orienting the spatial transformation. In Hungary and Poland, city centres have been subject to spatial differentiation since the mid-1980s due to the increasing number of private enterprises, including the concentration of specialized retailers on the peripheries of the expanding main shopping areas. In the early years of liberal land-markets, the expansion and fragmentation of retail floorspace was occurring in the main shopping areas as a consequence of 'small privatization' programmes, restitution,<sup>3</sup> the collapse of state companies and the changing rent policies of local authorities (owners of most of the commercial stock). In this period, city centre retailing was characterized by small-scale, piecemeal developments and high levels of instability.<sup>4</sup>

However, there were similar spatial trends in the 1990s, as international and successful domestic retailers' decisions played a major role in the re-evaluation and transformation of urban space in each of the countries considered here. The location of retail investments in the capital cities of East Central Europe was increasingly decentralized in the late 1990s: city centres, 'transition zones' and urban fringes<sup>5</sup> were the investors' targets.<sup>6</sup> As a consequence, the 'centrally planned' pattern of urban land markets (Szelényi, 1996) was dramatically changed. However, city centres remained the most highly valued areas of cities among retailers, as was reflected by rising rents.<sup>7</sup> As a result, the retailing of lower order goods, advanced producer services provided by domestic entrepreneurs, and office-related technical services shifted from the central business district (CBD) and were replaced by specialist shops, banks and other advanced services. The spatial split which emerged on urban land markets was largely stimulated by the differentiation of international multiples and domestic retailers in the late 1990s.

### Capital cities: winners and losers in the transition

The city centre has generally been identified as the focus of urban services, community life and identity.

The main shopping area (including the market place) is traditionally an integral part of the city centre and, as such, a focus of residents' perceptions of urban space. However, some of the functions of urban centres are endangered by the increasing time-consciousness of consumers and the impact of economies of scale throughout Europe, including the emerging market economies. The capacity to adapt to such challenges has required flexibility and resources, and this has accelerated the differentiation of retailers in the region. Trends towards concentration in terms of organization and spatial distribution have resulted in a dramatic change in the retail network and shopping behaviour in the late 1990s. This paper analyses these changes through a series of empirical studies<sup>8</sup> of Prague, Budapest and Debrecen (a Hungarian provincial town of 200,000 residents), to reveal the impact of new developments on local retail networks, the differentiation of local society in terms of consumption cleavages, and the changing use of urban space.

*Budapest* is considered to be a 'mature' market, in terms of the variety of 'modern' shopping facilities (that is, hypermarkets, supermarkets, city centre and out-of-town shopping schemes), that increasingly dominate local/national markets, and the stable level of land-market prices and rents. International investors took over domestic businesses that had been proliferating in the early 1990s as a consequence of restitution and small privatization. Large-scale developments increased retail floorspace by 15–25 percent annually, changing the spatial distribution of shopping facilities: there was a shift from city centres to outer districts and suburbs. At the same time, the shopping centres that developed on central sites attracted specialist shops run by international multiples and wealthy domestic enterprises. These processes resulted in structural change and an increasingly intensive land-use pattern in city centres. As a consequence of the early entry of international agents, the retail structure of the CBD in Budapest is highly structured in terms of goods and prices. Furthermore, due to the decentralized structure of planning licences, a spatially decentralized structure emerged.<sup>9</sup>

In the Czech Republic, the liberalization of prices and foreign trade, together with the lack of regulation of the commercial real estate market, also established a highly competitive environment that

stimulated structural changes in retailing. Due to the liberalization of the commercial land market, Prague's city centre was the most important scene for retail re-structuring in the 1990s, and was characterized by a changing range of shops, goods and contributors (understood as the social groups that have the largest consumption stake in a particular store/shop). This classical form of transformation, driven by (land-) 'market forces', was accelerated by the rising number of tourists and the development of Prague's international CBD functions (Sykora, 1999). As a consequence, the rapid and sharp increase in the rents and prices of retail outlets in the main shopping area was (and still is) even more striking than in Budapest and Warsaw. Town planners have sought to ease the commercial pressure on the city centre through a planned expansion of the CBD in a recently approved Master Plan. Such plans are threatened by deficiencies in the planning system (especially a lack of coordination between municipalities) and in the licensing/approvals procedure (a tendency for the attitudes of officials to soften under pressure from major developers). These problems are manifested in a declining proportion of residential use in the city centre.

Despite the differences in national policies and urban planning systems, trends in the transformation of retail networks and shopping behaviour are similar in the two capital cities. Spatial disparities between the main shopping streets and other retail concentrations (that is, inner city 'high streets' and planned service centres on housing estates) increased in the early 1990s in terms of prices, range of goods and quality of services (for example, the application of new technologies such as bar codes). Such trends resulted in a consumption cleavage in social and spatial terms: the city centre, the traditional focus for residents' daily/weekly shopping trips, increasingly became a setting for highly specialized services (for example, specialist shops) that expanded at the expense of lower order services providing for 'local' people. This particularly affected the residents of the city centre and inner city districts, and low-income households in the outer districts.

The entry of multinational retailers reinforced the trends discussed above. Development schemes in the urban cores of the capital cities transformed their surroundings by inflating rents, resulting in an increasing proportion of specialist shops, mostly

owned by multiples. This has been associated with rising prices and a significant change in the range of contributors (i.e. shift to upper and upper-middle-class customers). As a result, higher income customers and tourists have tended to displace local residents as shoppers in the city centre. Shops selling lower order goods (many of them run by domestic retailers) were pushed to the 'periphery' of the main shopping area where vacancy rates are relatively high. In this way, international investors 'use' the geography of urban land markets to form a new retail environment in the city centre, while channelling demand to places (for example, out-of-town centres) where ample sites are available at reasonable price. This raises values in the major centres, and exploits economies of scale, at the expense of the urban poor and elderly, and other social groups unable to adapt to new forms and techniques of shopping.

### New attitudes towards consumption and urban space in a provincial town

In the late 1990s, multinational retailers increasingly focused their investments on major provincial towns. The flow of capital was influenced by hierarchical and spatial (West–East) dimensions in the countries considered here, although the spatial differences had become more balanced by 2000 (Figure 1). Retailing in larger Hungarian cities, with more than 100,000 inhabitants, received a major impetus (a spatially concentrated 150,000–200,000 m<sup>2</sup> increase in retail floorspace) that transformed shopping behaviour dramatically within a few years. This paper hypothesizes that, in a city where travelling costs are not a major issue, given its limited scale, large-scale developments can transform shopping trips radically in the short run.

Societal and spatial aspects of the process were studied in Debrecen, a regional retailing centre in East Hungary (Figure 1). The choice of case-study is based on the spectacular structural transformation of the city's retail network, which commenced relatively late, in 1997. As a result, new centres of gravity<sup>10</sup> emerged and significantly changed the local retail network. Our research methods involved surveying the flows of shoppers and the structure of shops. The questionnaire surveys were based on

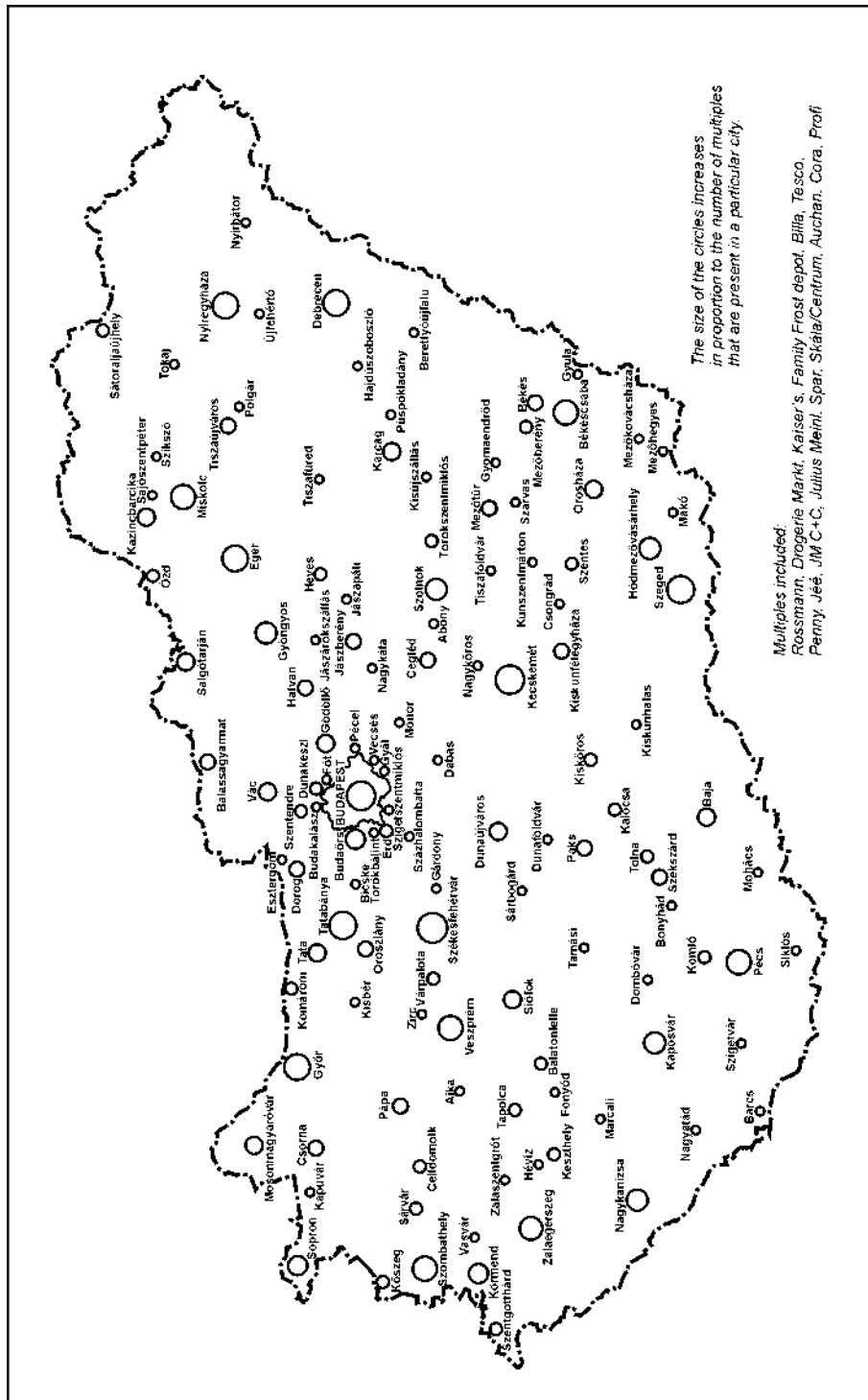


Figure 1 Spatial distribution of international convenience goods stores in Hungary (1999)

.Source: Home-pages and brochures of the multiplexes listed.

representative samples in respect of space (the major foci of shopping), time (weekday rush-hours) and the social composition of the interviewees.<sup>11</sup>

The residents' mental maps of the new developments in Debrecen are basically determined by their age and qualifications. The elderly retired are least familiar with the new developments. The best-known new unit in the local retail network is the Tesco hypermarket, listed by most of the interviewees, followed by Interspar and Debrecen Plaza. Their prominence can be attributed to their proximity to the city centre, their favourable location in terms of both private and public transport and, last but not least, the publicity given to their construction.<sup>12</sup>

Our surveys demonstrated that the construction of Tesco near the open market and the bus station was a particularly successful strategic decision. Its increasing influence on the shopping behaviour of residents rests on the choice of site. In contrast, the Metro hypermarket was only included in the mental maps of mobile social groups, stocking-up through weekly shopping trips, and describing themselves as belonging to the medium and upper-income groups.<sup>13</sup> However, the most 'conspicuous' shops in proximity to the city centre, which are easily accessible for many shoppers and offer a broad selection of goods, have become prominent since 1998, leaving behind their rivals (for example Julius Meinl<sup>14</sup>) with more modest floor areas, even though these have a long-established market presence.

The selection of goods, prices and the standard of service are supposed to be the most important factors in changing shopping habits (Bennison, 1980; Davies, 1984; Monheim, 1998). For middle and upper-class shoppers, all these factors are significant in their changing purchasing behaviour. These new habits are linked to investments in new shopping facilities.<sup>15</sup> The distribution of well-known brands of domestic goods, and the appearance of domestic/local businesses as tenants in new shopping facilities, seems to attract local shoppers<sup>16</sup> who might otherwise be considered to be resistant to these changes. The protected, 'safe' interiors of these centres is also appreciated, particularly by women shoppers. In contrast, elderly and low-income groups did not consider the new facilities to be attractive. They have a critical attitude to the choice of goods, new services and the aesthetic values of the new developments. Moreover, the

overwhelming majority of residents (90 percent) complained about the increased traffic. The negative externalities of retail developments are borne by the entire local population, whereas their advantages are only known to and realized by the better-off and the more mobile.

The scale of changes in shopping has been dramatic between 1996 and 2000, the period to which the survey refers. At the time of the survey, 64 percent of the interviewees shopped for food and other daily staples in new stores. Increasing competition, resulting in an improved selection of goods and better services, as well as reshuffling the residents' spatial routes, has contributed decisively to the restructuring of shopping trips. Multi-purpose shopping trips have become common in about one-fifth of households, mostly the more mobile and higher-income ones. The changes in shopping behaviour seem to be closely related to new developments and, for example, the primary targets of multi-purpose trips are Tesco and Interspar.

The increasing share of internationals is even more striking in the durable goods sector, as is customer differentiation (in favour of mobile and higher-income groups). In the clothing segment of the market, small specialized shops and department stores, concentrated in the main shopping area, still hold a major stake. However, the share of new malls, where 28 percent of the interviewees shop, is increasing. The latter is stimulating spatial concentration, as more than 40 percent of the tenants in the new city centre shopping mall sell apparel. Our survey shows that those aged under-40, who are professionals and belong to either of the two middle-income quarters, are strongly over-represented among the customers of the new facilities.

Urban space in Debrecen is fragmented by social differentiation that is manifested in the transformation of shopping routes. Residents of higher-prestige districts (for example, the eastern part of the city centre) and higher-quality housing estates in the northern and western parts of the city (Ekéné Zamárdi, 1996; Sailer-Fliege, 1996) shop in Tesco, Interspar and the new downtown shops. However, the customers of Metro, Tesco and Debrecen Plaza are attracted from the entire area of the city, although the city centre and northern districts' residents are highly over-represented. Meanwhile, very few residents from the traditional, lower-

income (eastern and south-eastern) areas figured among the interviewees at these sites. Instead, the shopping behaviour of the population of the ageing and peripheral south-eastern areas is rather 'conservative': relatively few make use of the new shopping facilities and take advantage of the wider selection of goods and seasonal sales. The peripheral position of these districts, manifested in their residents' immobility and customer behaviour, is also reinforced by the lack of retail developments in the area.

People living in, and in the vicinity of, the city centre as well as the more mobile groups in the local society, were favoured in terms of access to goods and related services,<sup>17</sup> whereas the population of the peripheral districts is forced to commute more and is dependent on small independents (that have an uncertain future in the face of increasing competition). Their position is exacerbated by the decline and/or transformation of the traditional targets of their shopping trips (that is, city centre shops and department stores), as a consequence of rising rents and the restructuring of stores in the main shopping area. For the less well-off, the open-air market near the city centre remains a prime target for securing lower prices.

Local policies do little to support the relaxation of such differences. The city centre has remained the prime destination of the public transport routes on which less mobile pensioners and lower-income households depend. As a result, these social groups face long journeys to shop within the city. The new Master Plan includes a scheme for moving several sections of the open-market (specializing in cheap durable goods) to a more peripheral site. Furthermore, the extension of the pedestrian area and rehabilitation or clearance of surrounding blocks in the main shopping area will further increase real estate prices. The major plots scheduled for clearance will probably be acquired for large-scale developments with mixed functions (specialist shops, business services, high-quality apartments). Such changes are likely to reinforce socio-spatial inequalities in the city.

## Conclusions

Due to the wave of concentration in commerce in the 1990s, the attention of major corporations in

Europe and elsewhere has turned to East Central European markets. The entry and expansion of multiples in Hungary has played an important role in shaping their strategies for emerging markets. The resultant changes remain difficult to assess. In capital cities and the largest provincial cities, large-scale developments have transformed consumer habits and the spatial shopping trips of the urban population, who have adapted very rapidly to the new retail structure. In this way, the gravity centres of shopping have changed: customers increasingly target the city centre for its specialized shops, but its role is declining in daily and weekly shopping. The flow of shoppers is also shifting from the traditional main shopping streets to new shopping centres and the stores clustered around it.

Those households better able to take advantage of new developments – for example, late-night shopping, quick service, a supply side catering for broader and more specialized demand, shopping tourism, etc. – are definitely the winners in these changes. For those dependent on traditional shopping targets, either out of necessity or for any other reason, the disadvantages of the transformation are the increasing specialization of city centre retailing and the loss of existing shopping facilities. Consequently, the elderly and the poor have to travel longer distances, particularly in capital cities. The deterioration of service centres in low-status housing estates (constructed in the 1960s and 1970s), related to supermarket and hypermarket developments, also results in longer shopping trips and further devaluation of the physical environment. Finally, low-income households are also losers, because their low mobility means that they lack access to, and cannot benefit from, many new shopping facilities. The ability to adapt to using new facilities also differentiates urban society. 'Mapping' new shops and goods means learning new shopping techniques, and even simple tasks such as finding one's way around a shopping centre seem to depend on age and education according to our surveys.

Local society has become strongly differentiated in terms of access to shopping facilities and consumer habits. For the residents of the ageing and less valued residential districts, the retail units of the traditional commercial network remain important, while new hypermarkets and shopping centres are 'distant' in physical and psychological terms. As this is related to mobility, and thus to socio-economic

status, the location of shopping becomes a marker of social status even in the case of daily consumption goods, which are hardly considered to be a status symbol in Western Europe. It can be argued that 'consumerism' emerged in a 'rough' form in East Central Europe: it is not the refinement of shopping behaviour and individuation that differentiates urban society, but purely the ability to take (or not) advantage of new facilities. Changes in the use of urban space are driven mainly by international and domestic retailers and the increasing spatial differences are not eased either by local authority planning or by central governments, given their liberal economic policies and low priorities for social policy.

## Notes

- 1 In Hungary, improved access to material commodities was a political device for calming political and cultural movements.
- 2 Particularly, Poland and Hungary.
- 3 Only in Poland and the Czech Republic.
- 4 In Hungarian provincial towns, the tenants and the mix of goods changed 3–5 times a year in shops in the main shopping area during the period under review (source: field observation in Szeged and Győr, 1991–4).
- 5 Decentralization of shopping facilities is interpreted as an aspect of suburbanization by Timár, J. and Váradi, M. in this issue.
- 6 The transformation of industrial estates (the 13th District in Budapest, the 3rd in Warsaw and the 7th in Prague) is partly a result of this process.
- 7 There was a tenfold difference between the shopping areas in greatest demand and out-of-town sites in *capital cities* (Prague, Budapest, Warsaw, 1999) (Nagy, 1999a).
- 8 Empirical studies included field surveys in Prague and Budapest (focused on the changing structure of shops, contributors and prices), a series of interviews with major retail developers, and a survey of shoppers in Debrecen that is discussed in Note 11.
- 9 This structure is rooted in the planning system. Authority is divided between the city government of the capital and the districts. The former is licensed for making the Master Plan for Budapest but the latter are empowered to make detailed local plans, grant building permissions and 're-interpret' the principles of the Master Plan.
- 10 The new Tesco hypermarket on the western edge of the city centre, Debrecen Plaza on the northern edge of the main shopping area, Malompark shopping mall, leased by

Praktiker and Interspar (as anchors), along the main route no. 33, and Metro on the western edge of the city. Each occupies a 20,000–30,000 m<sup>2</sup> retail floorspace.

- 11 The methods used in our empirical studies rested on the experiences of a series of case-studies (Monheim, 1998). We asked 400 residents of Debrecen, stratified by age and occupational skills, about their shopping habits. The foci for the interviews were the busiest public transport hub on the edge of the city centre, the new city centre shopping mall (on the northern edge of the main shopping area), the main shopping street and a shopping subcentre in the largest 'socialist' housing estate.
- 12 The local Master Plan had to be modified so that Tesco could secure building permission. The Plaza group litigated with MIÉP (a right-wing radical political party that protests against manifestations of globalization) to obtain a city centre site. Local newspapers covered these cases in detail.
- 13 The interviewees were asked to identify which of the four income groups they belonged to.
- 14 The complete East Central European network of the Julius Meinl group was taken over by Match in 2000.
- 15 Mainly under-40s, belonging to the middle-income brackets, shopping in Interspar and buying new types of food.
- 16 Both aspects are present in the East Central European expansion strategy of international chains.
- 17 In these districts, the density of Hélikor and Coops shops is relatively high (both are local networks of former 'socialist' companies).

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