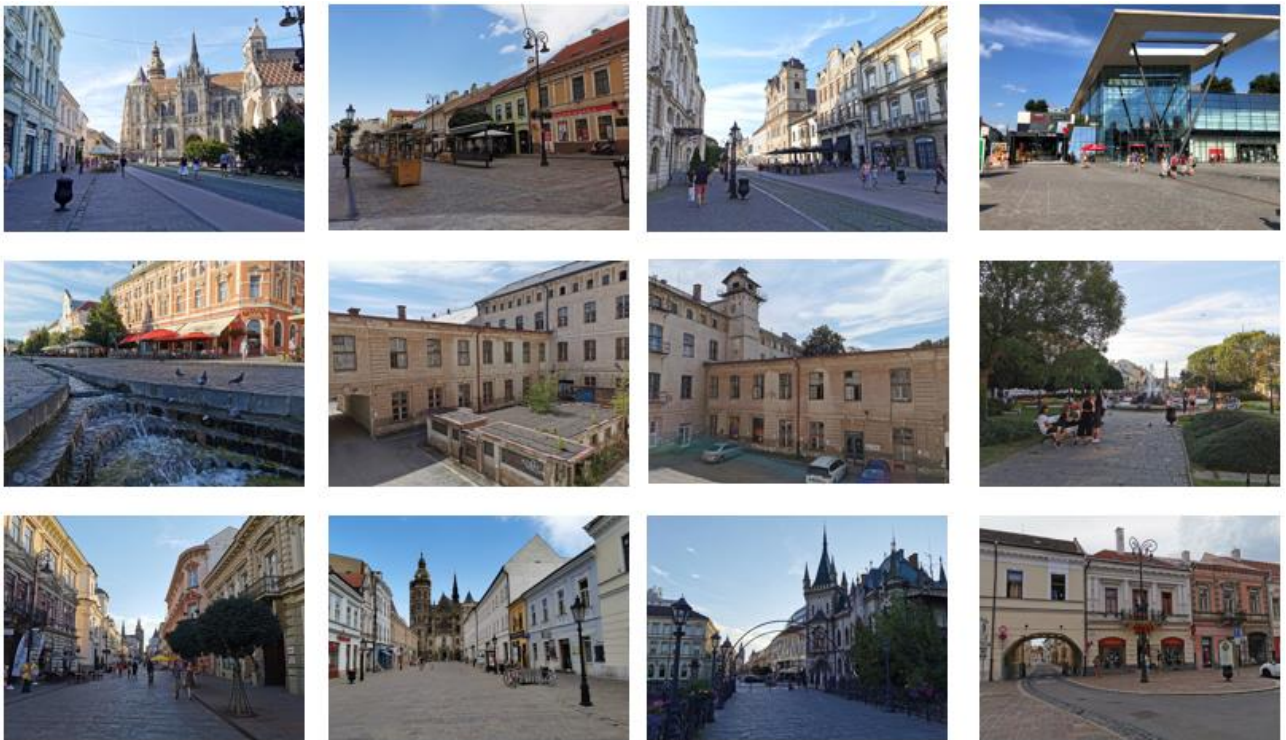


Location Analysis Košice



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1. Purpose of the location analysis

As part of work package 1, CIMA's task is to perform an initial, general location analysis in all CINEMA pilot locations.

The main aspects and objectives of this location analysis can be summarised as following:

- ▶ professional assessment of the economic and urban development structures in the city centres of the 8 pilot locations
- ▶ on-site visits including inspection of the micro pilot locations for creative industries development
- ▶ evaluation of the economic effects and interactions of the creative industry projects on the inner-city structures
- ▶ professional input or comments for the planned pilot model in the creative industries
- ▶ conception of accompanying measures to make inner-city areas more attractive

The site analysis is based on the following insights and results:

- ▶ results of the written surveys by CIMA, CIKE and HDS
- ▶ on-site visit or inspection of the planned micro-location in Košice for pilot model implementation
- ▶ "city check" - economic and urban development on-site analysis of the city centre on the basis of a 23-part catalogue of criteria
- ▶ "trend check" - evaluation of the city centre of Košice on the basis of 24 current trends in consumer- and location marketing, retail, gastronomy and residential sectors

- ▶ meetings with local decision-makers from the city politics and administration of Košice
- ▶ CIMA's many years of experience in the economic and urban development assessment of city centres and corresponding location benchmarks

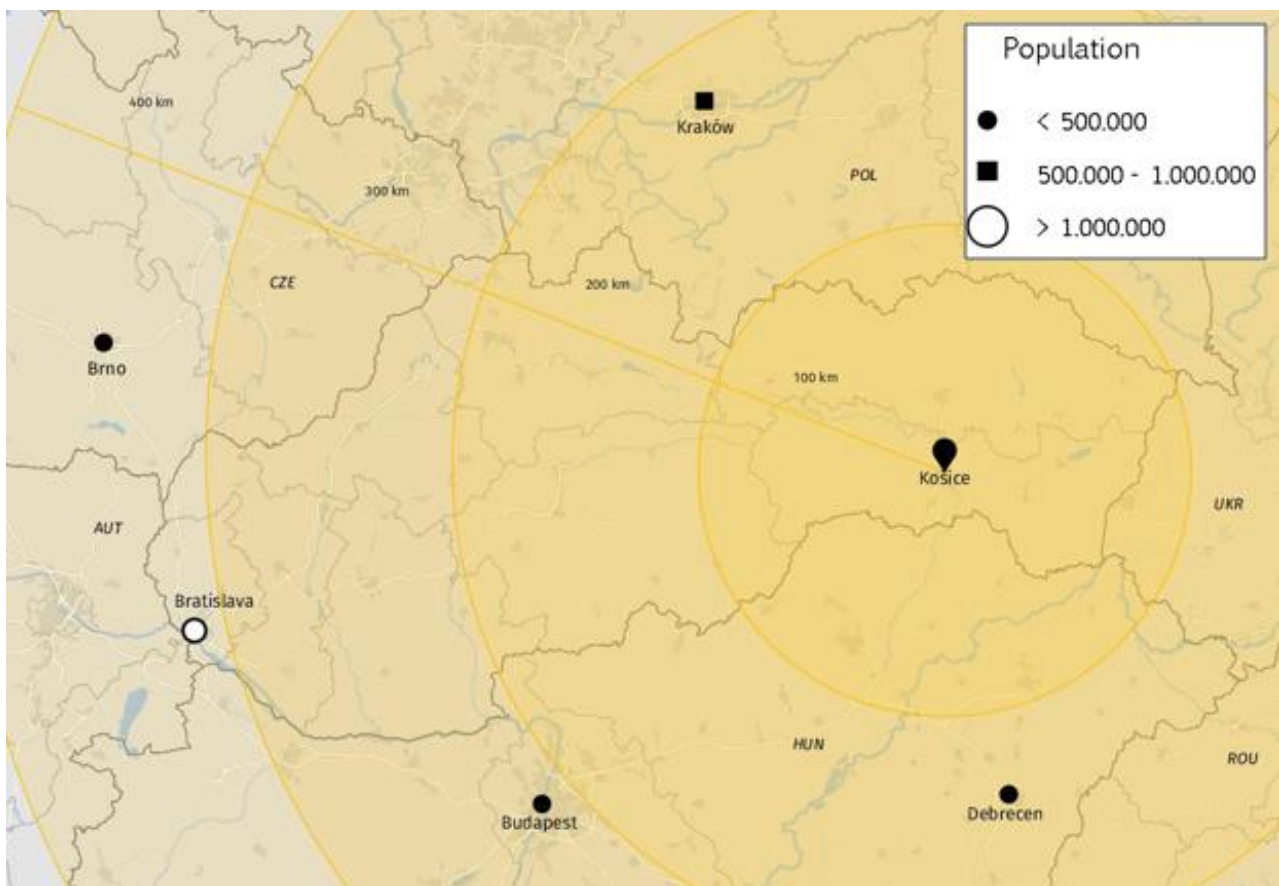
Due to the overall CINEMA project concept, the financial and time limits, this location analysis is a first orientation guide, but **not a complete** (inner) urban development concept.

The on-site analyses in Košice were conducted by CIMA from **August 10th - 12th 2020**.

2. Facts and figures about Košice

2.1. General description

Situated in the east and close to the Hungarian border, Košice is with about 238,600 inhabitants the **second biggest city** in Slovakia. The oldest settlements in the area date back to Young Stone Age. The first mention of the city “villa Cassa” is from 1230; 1248 it received the first rights as a city. Today it is the biggest heritage protected city area in all of Slovakia with numerous sights, monuments and museums.

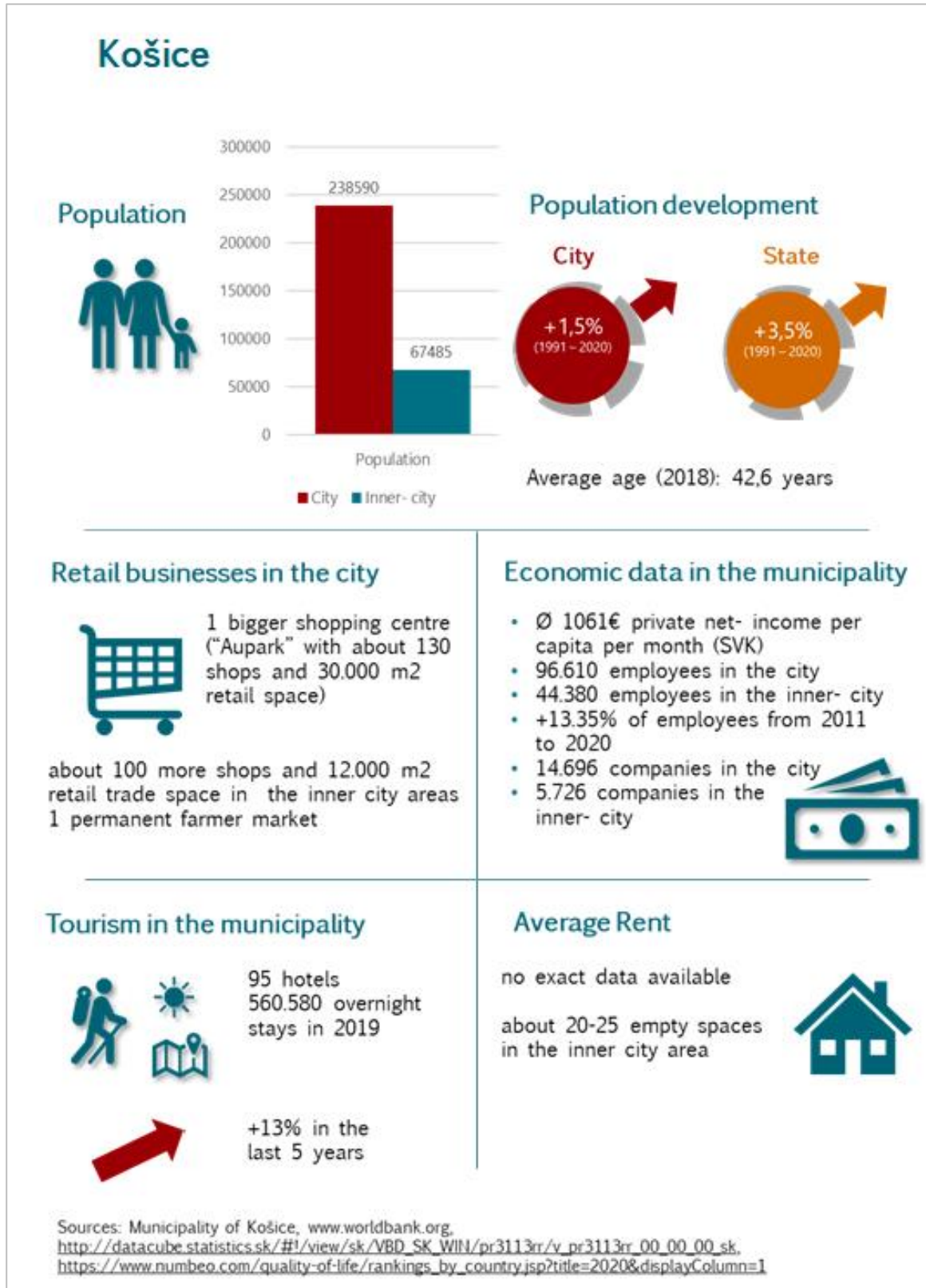


Source: www.mapz.com, adapted by CIMA, 2020

With 20 kms to the Hungarian border, 80 kms to the Ukraine and 90 kms to Poland, Košice is located in an international triangle. There are direct train connections to Bratislava, Prague, Budapest, Kiev, Vienna, Lviv, Krakow and Cheb. The closest (regional) airport is Košice, 6 kms from the city centre.

The city is also situated at several main European highways, like the E50, E58 and E71.

2.2. General location data



Expert remarks:

The following expert remarks are made on the basis of this data:

- ▶ The trend of strong population growth in the last 20-30 years, which can be observed in many larger European cities and urban agglomerations, cannot be observed in Košice. Despite good urban infrastructure, investments in new residential areas and a strong increase in employment (+ 13.4 % since 2011), the population growth of 1.5 % in the period 1991-2020 is to be judged as very marginal.
- ▶ On the positive side, it should be emphasised that around 28% of the city's population live in district 1 (= city centre) and thus represent an important local consumer potential for the city centre economy.
- ▶ The retail structure of the inner city is clearly dominated and qualified by the "Aupark" shopping centre. A striking detail is that there are hardly any larger business structures in the retail, service and gastronomy sectors directly around the shopping centre.
- ▶ With around 20-25 vacant commercial spaces (as of August 2020) in the entire inner-city area, there is no vacancy problem. Only the former and now vacant department store in the upper area of Hlavná is a detriment to the otherwise very attractive city centre image, and not only visually.
- ▶ Although the number of overnight stays by tourists does not reach the level of other, similarly large and historically important European medium-sized cities (e.g. Augsburg, Ghent, Graz, Linz, Ljubljana, Verona, etc.), it can be classified as quite high. The "Capital of Culture 2013" effect obviously also had a strong impact on the following years (+ 113 % in overnight stays in the last 5 years).

2.3. Economic structure

Košice is a former industrial city and up to now, the big **steel factory** is still one of the main employers in the city, although the number of employees is decreasing constantly. The **IT sector** is becoming a major player in the city's economy.

Since Košice became **European Capital of Culture** in **2013**, the cultural and creative industries came into the spotlight. Many activities were set to implement and promote this sector.

2.4. Town centre marketing and city centre development

Currently, the main contact point for the development of the inner-city area is the city's Strategic Development Department and the Chief Architect's Office Department.

Up to now there is no **Town Centre Marketing** organisation in action. Furthermore, there is also no entrepreneurs/merchants association for the inner city area existing.

The **Touristic Marketing** is done by "**Visit Košice**", whose main stakeholder is the City of Košice.

2.5. Creative industries in Košice

Today, there are around **3,000 creative businesses** in Košice. Besides those businesses, there is an entire ecosystem supporting and interconnecting this sector, like start-up and co-working hubs, associations, several secondary schools for art, the Faculty of Arts at TUKE and many more. In addition, several regional and national programmes not only support the CI, but follow mid- as well as long-term strategies of implementation and networking. One of those projects regarding the CI in Slovakia was for example the idea that every district capital should have a CI support centre with a regional focus. This project is still in development.

Main CI related developments in Košice

The nomination as European Capital of Culture in 2013 also brought several investments and developments. One of them was the cultural park (“**Kulturpark**”), a 24 mio. Euro investment on a former military area south of the inner-city area of Košice. On 3 ha, 3 buildings have been converted into a cultural centre. Today, the area accommodates a library, a museum, a café, offices, common and living areas.

Tabačka Kulturfabrik, which is the pilot location in this project, is an open zone for contemporary art, culture and creative collaboration at the 2,500 m² premises of a former tobacco factory, a few hundred meters north of the inner-city area.

Pilot location




Strojárska 3,
04001 Košice
Slovakia

- The building to be revitalised is situated close to the historical centre of the city of Košice.
- It is listed building of the former tobacco factory which is in property of ASP Košice Self-governing Region (KSGR).
- The building is semi occupied with different artists, cultural organisation and in the parts of the building there are offices of KSGR and ASRD.
- There is a vision to create a Creative Centre with incubator and support programs for companies and individuals working in CCI.
- KSGR has applied for the national call - Mobilizing creative potential in the regions. This type of support involves building a creative centre in each region of the Slovak Republic.

Challenges

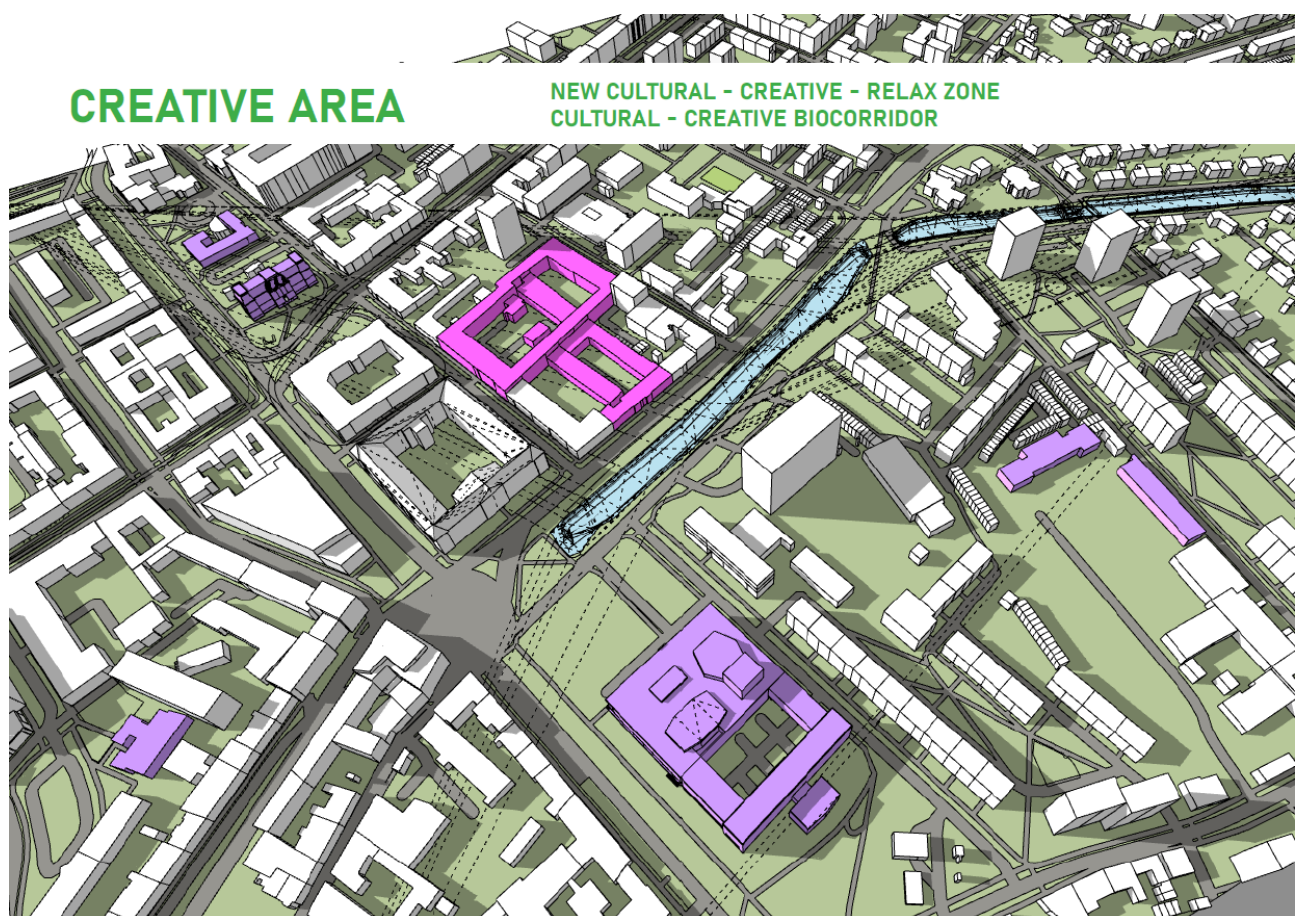
- There is still relevant part of vacant floor space which needs to be developed
- With the CINEMA project, a concept for a space of approximately 120sqm shall be developed and piloted to attract creative businesses as tenants.
- Additionally, an extra training session for future management on facility management, business development and community development will be developed and implemented.




Source: Tabačka Kulturfabrik/HUBa Coworking, 2020

The plans for the pilot location are already very advanced and also include architectural studies for the premise. They include offices and ateliers for artists and creatives, gallery space, common spaces and workshops, a creative incubator and support programmes for businesses, entrepreneurs and individuals working in the creative industries.

The pilot location is situated in the middle of another big development: the **creative area/quarter**.



Source: Tabačka Kulturfabrik/HUBa Coworking, 2020

Peter Radkoff from Tabačka Kulturfabrik, **Peter Beňo** and **Pavol Mészáros** from HUBa Coworking have recognised the unused potential of some (inner) parts of the city and developed plans for this area, where several creative institutions and businesses are already situated, for example the East Slovakian Museum, Tabačka Kulturfabrik, Úsmev cinema or the secondary school of applied arts. The conference centre is also part of this

area as well as the city library, which could both be used for events and workshops. The water channel will be converted into a biocorridor and recreational area. The traffic system and roads will also undergo some changes. This project is well connected with the new “**strategy of cultural and creative development 2020-2027**” and the goal of becoming a “green city” in 2023.

Keyplayers in the development of CI in Košice

KSGR (Košice Self-Governing Region) is one of eight self-governing regions in Slovakia. Its aim is to develop a local, municipal economy within the Programme of Economic and Social Development (2016 - 2022). It also supports initiatives of the CCIs in the region and have been the main force behind the development of “Kulturpark”.

ASRD (Agency for the Support of Regional Development Košice) is a non-profit organisation founded by the Košice Self-Governing Region in 2003 to promote and support public services in regional development. Its main tasks are the effective and sustainable rural and local development, including societal, economical, innovational, cultural and creative issues. The ASRD actively obtains grants, fosters cooperation and networking and helps to transfer good practice examples into the region.

CIKE (Creative Industries Košice) is a NGO, which has been established in 2008 by the City of Košice to manage the European Capital of Culture 2013. Its main purpose nowadays is to support the CI in the city: professional trainings, support of new entrepreneurs, local and international networking and cross-sectoral collaborations, support of international exchanges through residencies, building of international partnerships and help with settling down in the city are just a few of the many tasks CIKE undertakes in accordance to the Košice Creative Economy Master Plan 2020 and the Cultural Strategy of the city.

STROJ is a civic association representing creatives located in the space of Strojársená 3 in Košice. The association members are unpaid and work on a voluntary basis. The main priorities include the active participation in the development of the CI in Slovakia and coordinating the needs and goals of the association with KSGR and the city of Košice, connecting individuals and their activities to foster closer cooperation and assistance as well as continuing the artistic and educational work.

Support programmes, strategies and networks (selection)

Slovakia has a lot going on in regards of creative industries and strategies. On a national level there are several support platforms and supporting programmes, like **MKSR iROP**, the Platform for CCI, the **Slovak Arts Council** and the **Slovak Business Agency**.

On a regional level, there are support grants for culture and the Strategy for Creative Economy 2016. Regional creative support centres are planned as part of the CINEMA project.

Locally, there are cultural strategies as well as a masterplan for CE, a Grant Scheme for CCI, CIKE - a support organisation for CCIs and K13 rental services. Local hubs include eastcubator, HUBa co-working and Starport. There are also support programmes for business development/micro loans.

Furthermore, there is another INTERREG project called COCO4CCI, which also develops and supports the CCIs. Košice is also part of the UNESCO Creative Cities Network, the Trans Europe Halles as well as IETM and ECBN, which support organisations. There is also the Košice IT Valley, which is a cluster for the development of the IT industry.

3. “City check” results

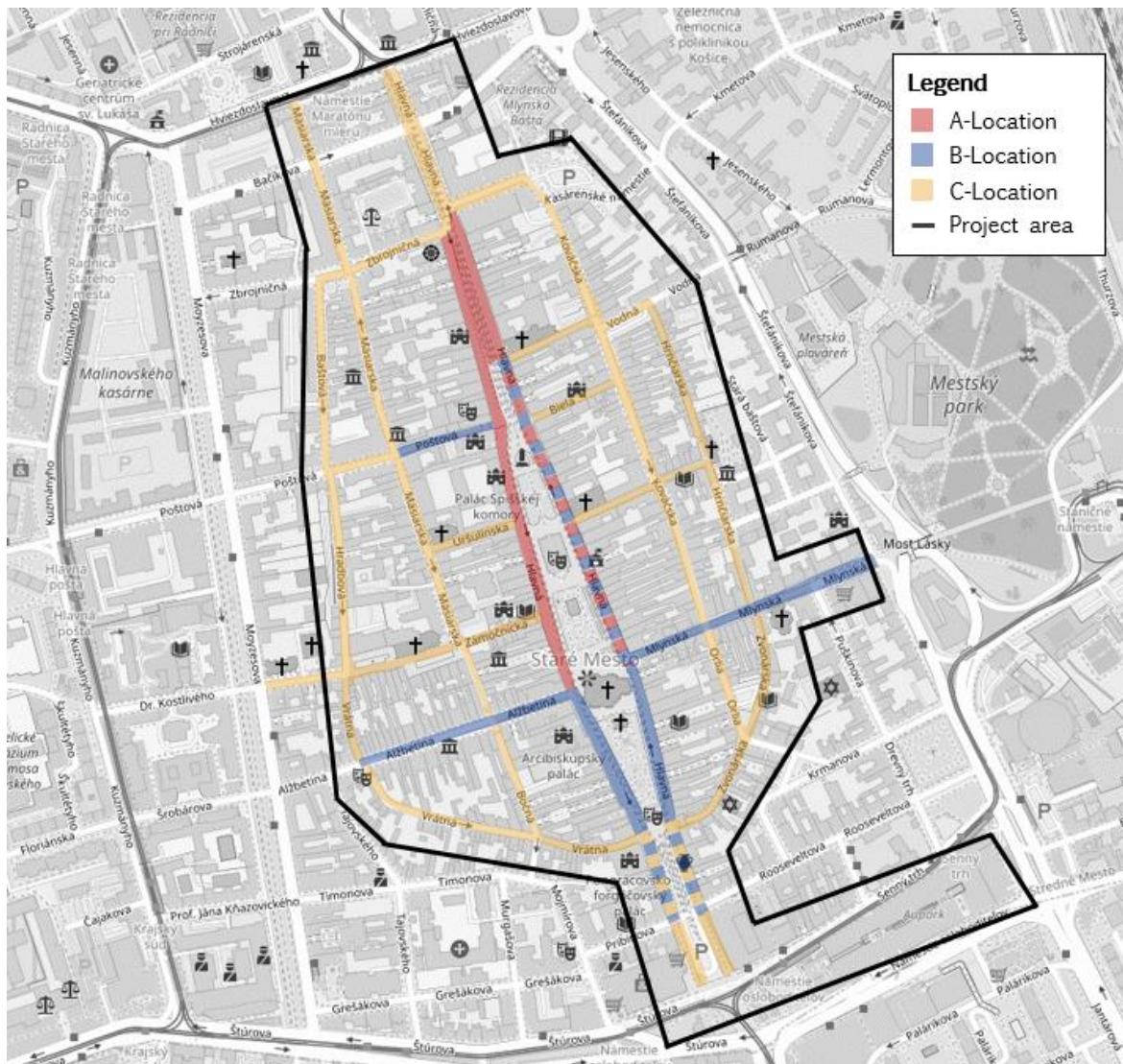
On the following pages you will find the main technical findings of the city check in Košice, which took place from 10th to 12th of August 2020. The city check was done by foot on the basis of 23 urbanistic, property and transport criteria.

3.1. Classification of the inner city areas

In a first step, the streets, alleys and squares of the city centre were examined according to the individual property-economic location qualities.

CIMA follows the classification criteria of the real estate industry and divides the city centre of Košice into the following three location qualities:

location qualities in city centres	description
1A	<ul style="list-style-type: none"> ▶ main shopping area of the city centre ▶ high pedestrian flow ▶ continuous use of the buildings at ground level as commercial space ▶ diversified mix of retail trade, gastronomy and personal services enterprises
1B	<ul style="list-style-type: none"> ▶ significantly lower pedestrian flow ▶ visible gaps of business-oriented ground floor use
1C	<ul style="list-style-type: none"> ▶ low pedestrian flow ▶ frequently accumulation of empty spaces ▶ usually presence of retail companies with special product ranges and high percentage of repeat clients



Source: openstreetmaps.com, adapted by CIMA, 2020

The heart of the city is the main street **“Hlavná”**, which connects the emerging cultural and creative areas of Tabačka Kulturfabrik in the north with Kasárne Kulturpark in the south. The city centre is dominated by **high-quality gastronomic entities** and less by mainly small and medium sized (owner led) retail shops . The main retail offer is situated in **Aupark**, a big shopping center at the south end of the inner-city and Mlynská, coming from the main railway and bus station. With vast pedestrian zones and traffic calmed areas as well as natural shade, fountains, sitting areas in parks and well cared for monuments and houses, the inner-city of Košice offers a **high quality of stay**.

3.2. Assessment of the inner city quality

Based on the criteria set, CIMA assesses the inner-city qualities in the following way:

criteria	description
city greening	▶ “islands” of greenery (flower arrangements, trees etc.)
illumination design	▶ illumination design in the inner-city areas ▶ street lamps and illumination of buildings and monuments at night
city furniture	▶ partly; there could be more sitting possibilities at some parts of “Hlavná”
cleanliness	▶ the main areas are very clean, some smaller issues in the side-streets
surface design	▶ different surfaces, like cobble stone, stone tiles, asphalt, clinker
house facades	▶ some houses in the inner-city area need to be renovated
barrier free design	▶ partly barrier free ▶ some buildings are not barrier free, especially in the side-streets
pavement width	▶ in the main areas very broad pavements or pedestrian zones; in the bigger side-streets mostly broad enough, in the smaller streets not always
pedestrian safety	▶ main pedestrian zone “Hlavná” ▶ most of the town is very safe for pedestrians (pedestrian zones, traffic-calmed areas, broad pavements etc.)
parking facilities	▶ sufficient parking space for the various user groups (surface parking as well as parking garages)
traffic and signposting	▶ no parking guiding system, almost no signs for pedestrians
usability for events	▶ generally possible ▶ directly on the central square “Hlavná” or in the pedestrian zone “Dominikánske námestie”

	1	2	3	4	5
overall impression of the city centre ambience		●			
quality and density of retail trade				●	
quality and density of gastronomy	●				
cleanliness		●			
city greening	●				
illumination design	●				
surface design & condition		●			
presence and condition of monuments		●			
house facades and building conditions			●		
density and condition of traffic/signposting				●	

(evaluation by school notes: 1 = very good; 5 = very bad)

3.3. Further comments on the city centre quality

While the city centre of Košice has numerous access points, three main routes into the centre can be determined: one coming from the North off “Hviezdoslavova” and the direction where the pilot location of “Tabačka Kulturfabrik” is located, one coming from the main train/bus station “Staničné námestie” in the East and one coming from “Námestie osloboditeľ’ov” in the South, which is the square where the shopping centre “Aupark” is located. The large square offers several direct tram and bus connection as well as two car parks (garages) in ultimate proximity.



It’s noticeable, that the shopping centre “Aupark” has almost **no impact** on the **pedestrian flow** to the city centre at all; it is an entity of its own, which does not send any impulses or stimulation for the inner-city. Along the north side of “Aupark” at the opposite side of the street are some small, owner led shops as well as small gastronomic entities and casinos. At the corner and the beginning of Hlavná is the Double Tree by Hilton Hotel and several bank institutes. The small square between “Rooseveltova” and “Námestie osloboditeľ’ov” is used as a parking area and taxi station. This area forms a **kind of “blockage”** between Hlavná and the “Aupark” and makes a visual and pedestrian comfortable connection between the two areas very difficult.

Going north, the main part of Hlavná begins. The stretch between “Rooseveltova” and “Zvonárska” offers mainly casinos, bank institutes and some fast food oriented gastronomy. There are some trees and sitting possibilities, but in general this area is **under-frequented** and **unattractive**. Therefore, it is considered a 1C location with tendencies towards 1B, if the right measures are taken.



Starting from “Námestie slobody” (the junction between Hlavná and Vrátna/Zvonárska), the heart of the city reveals itself. A **top designed** pedestrian area, Hlavná used to have a tram way right through its centre, which was replaced by clearly marked, broad bike lanes in both directions. Three small parks/gardens and several islands of greenery as well as trees and many sitting possibilities characterise Hlavná. In summer, there are water stations with rain to cool down. There is a lighting concept visible, the main part consists of iron-cast lanterns.



Beneath Hlavná, the remains of the old gate and city wall can be visited. The buildings surrounding the pedestrian area are mainly historic buildings with few newer buildings. The surface mainly consists of clinker and granite blocks. The **signage system** is **good**, there are public toilets and the cleanliness is also alright, there are numerous iron-cast wastepaper baskets available. At the northern part, there is a small old water channel integrated. Several fountains, statues and monuments can also be found at Hlavná, for example the Cathedral of Saint Elizabeth, the Tower of Urban, Saint Michael’s Chapel, the National State Theatre and the Plague Column.



Coming from “Námestie slobody” on the left side until “Poštová”, Hlavná is a 1B location with some retail shops with small to medium sized sales areas. With only a few chain stores like Gerry Weber and Betty Barclay, the rest of the retail offer is **diversified**. Most of the shops could have a better shop and shop window design. On this stretch, some gastronomic units - primarily some bars and ice cream shops - are also present, but not as many as in other parts of Hlavná. The outdoor areas have a unified design with parasols. There are only little service providers and freelancers in this part of town.

On the right hand side of Hlavná until the Cathedral, a 1B location can be determined; between Mlynská and Františkánska it is a strong 1B location due to the high footfall and diversified economic offer on smaller scaled business areas, but could also be a weak 1A location. The goods are medium- and long-term demand, there are no food shops in this area. Very noticeable on this stretch are the well renovated facades, e.g. in front of the theatre, the visitor centre as well as the Hotel Slavia. The small park between the Cathedral and the theatre with the fountains and sitting areas is definitely an attraction point which draws footfall. The gastronomy in this area is restaurant oriented, which is also visible in the design of the outdoor areas with unified furniture and parasols. There are some high-quality bars as well.



The left hand side of Hlavná between the Cathedral and the theatre is characterised by a strong gastronomic density (mainly restaurants and bars) with almost continuous outdoor sitting areas. In between are shops, owner-led as well as chain stores, like DM, L'Occitane, Kenzo or Flying Tiger. This area can be rated as a weak 1A location. The shop window design could be strongly improved, especially at the owner-led shops. The presentation of the goods is very simple, there is no attraction, neither from close proximity, nor from afar. The carrier systems are also old-fashioned and of different quality and style. The lighting, labelling and signage need improvement as well.

The historic substance of the houses is also good on this stretch of Hlavná, although not as good as on the opposite side of the street. There are several tourist information points in this area, which rises the question why there are so many in one location.



The stretch between the theatre and “Zbrojnična”/”Kasárenské námestie” is a 1A location. The boulevard of Hlavná is getting more narrow, the urban building quality is as good as in the rest of Hlavná. There is a high density of shops, especially with small owner-led enterprises, as well as an almost continuous gastronomic mile on both sides of the street. The gastronomy differs between restaurants, bars, cafés and ice cream shops. The outdoor sitting areas are well designed and furnished. The branch mix is limited to mostly small boutique stores, photo-optic stores, jewellery and small bakeries; there are no bigger food stores in this area. Some bank institutes and service providers can be found here as well. There is a large, multi-storey former department store on this stretch, which is currently under renovation and will house several retail stores as well as a food court.



The last stretch of Hlavná between “Zbrojnična”/“Kasárenské námestie” and “Hviezdoslavova” is no longer a pedestrian area, but still has broad pavements and islands of greenery and trees as well as bicycle lanes. This area is dominated by a big school building and the Constitutional Court. There are some service providers as well and some small gastronomic entities. This is rated a 1C location.

It would be interesting to adapt some of the buildings and to create a connection to the pilot location of “Tabačka Kulturfabrik”. The direct axis to the inner-city could also be used for new developments, together with the new development of the warehouse. This would provide an ideal connection of the creative industry to the inner-city.

The main side streets off Hlavná are “**Alžbetina**” and “**Mlynská**”. “Mlynská” is the main connection from the train and bus station as well as the park “Mestský park” to the city centre. The entry to “Mlynská” is at the junction with “Štefánikova”, where the beautiful Jakob Palais is located. A pedestrian bridge with iron cast elements connects the street to the city park. “Mlynská” can be rated a 1B location with a lot of retail stores, especially second-hand fashion and smaller food stores as well as one medium-sized supermarket. The gastronomic entities are well structured, but of different quality and focus. There are bars, restaurants, cafés as well as ice cream stores. There are several freelancers and enterprise-oriented service providers clustered, five to fifteen in one building. There are also some empty spaces, some are in a very bad shape and not marketable.



The urban building structure can be rated as good in general; there are broad pavements and from to junction with “Puškinova” towards the city centre, it is marked as pedestrian zone. There is limited parking available on this stretch. The surface consists mostly of clinker, the cleanliness is okay. There is not much greenery.

“Alžbetina ulica” is a pedestrian zone coming from “Hlavná” until the junction with “Mäsiarska/Bočná”. After the junction it is a drivable street in both directions with several (short term) parking lots at one side of the street. The urban building quality is decreasing in this area: some facades need renovation, there are graffiti here and then as well as several empty spaces, which also need to be renovated. The economic structure consists of a bank institute, the tourism information at the beginning of the street and several, small scaled retail businesses (boutiques, model making) with small sales areas. The gastronomy is mainly based on fast food/take away and some small cafés, but the quality is medium to low. There are several service providers, especially travel agencies as well as textile cleaning shops, plumbers and interior decorators.

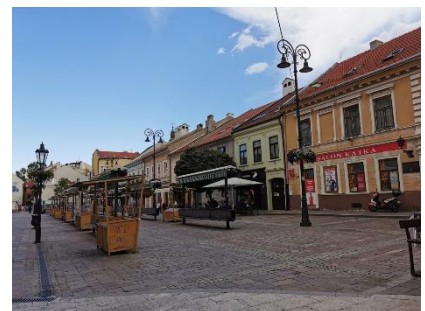
The general appearance of the surface and the street is ok. It consists mainly of clinker. There is almost no greenery, besides the weed growing at several places. The lighting system consists of iron-cast street lamps. The buildings are mainly from the 19th century, some need renovation. The cleanliness is general good to average.

“Alžbetina ulica” is currently a 1B location, but will decrease to a 1C location, if the correct measures are not taken within the next years.



“**Zámočnicka**” is a narrow alley, which connects “Hlavná” with “**Mäsiarska**”/”**Dominikánske námestie**”. The latter opens to a small square next to the convent, where there are mainly gastronomic entities (restaurants, cafés, bars) with outdoor sitting areas. There is also an open air market with unified stalls, which does increase the frequency of the area when open. With the market closed, it is a 1C location. There is almost no retail to be found here.

This part of ”Dominikánske námestie” is a traffic calmed area with access for suppliers until the junction with “Hradbová”. Accessibility and parking possibilities are very good. The surface consists of clinker and stone (granite) slabs. There are some monuments, a fountain and a street light system. There are some trees and flower arrangements as well.



“**Mäsiarska ulica**” is a parallel road to “Hlavná” with some small retail and gastronomic entities, which are not very visible on the outside. The gastronomy is strongly oriented towards ethno-food; if they have sitting areas, there are often inside the courtyards. There are several service providers, like retail marketers, lawyers, undertakers and interior designers. It is open for traffic and has several parking possibilities along the road, as well as a small parking lot opposite the market at ”Dominikánske námestie”. The urban building quality is decreasing; some house facades and shop windows need urgent renovation work, there are graffiti and the cleanliness is also not the best. There is very

little greenery. The surface of the pavements consists of clinker and they are broad enough for a street of this size. The asphalt on the road itself is okay and does not show any bigger damages.



“Poštová” is a well frequented connection street from “Hlavná” westwards with a 1B location quality. One part until “Mäsiarska” is part of the pedestrian area, the rest of “Poštová” is a one way street. In the pedestrian zone of the street on one side there are several small shops: boutiques, specialised food shops as well as personal service providers (e.g. hairdressers, cosmetic studios etc.). There are also some smaller gastronomic units, which do not have large outside sitting areas, like in “Hlavná”, due to the restricted space.

The other side of the street is characterised by closed walls of houses and living quarters. There is one bigger outdoor sitting area, but otherwise not much gastronomy or retail.

The house facades partly need renovation; there are many graffiti on the buildings as well as some empty spaces. The cleanliness is okay in general. The surface consists mainly of clinker and stone plates. The lighting system consists of lanterns. There is no greenery visible.



Opposite of „Poštová”, diverting off “Hlavná” in the East, is **“Biela”** - also a pedestrian zone connecting “Hlavná” with “Kováčska”. There are some cafés and bars, not much retail. “Biela” is an example for all the small side streets off “Hlavná”, like “Františkánska” or “Univerzitná”.



“Kováčska”/“Orlia” is - like “Mäsiarska” - a parallel street to “Hlanvá” with a diversified building quality and fully accessible by car. It is in general rated a 1C location. There are gastronomic units of different quality, from restaurants (steak house, ethno food) to bars and cafés (jazz club, wine and cocktail bars) as well as take-away food.

There are only few retail businesses and some service providers, like electricians, plumbers, but also lawyers, doctors, freelancers and some public offices. The residential buildings are increasing. The (mostly historic) building structure is okay, with one or another building that needs some renovation work. There are some graffiti here as well. Some trees and flower arrangements can be found as well as street lanterns and a good level of cleanliness. The main surface material is asphalt and clinker. There is a lot of short-term parking along the street as well as restricted private parking areas.

3.4. Košice trend check

City centres are - similar to companies - in a multifaceted competition for customers, tourists, investments in private and public infrastructures and projects, as well as companies willing to settle, and much more. Naturally, these inner-city economic areas are also subject to different developments. With regard to the most efficient and sustainable active location marketing and empty space management possible, this chapter of the location analysis highlights the most important current and future 24 European trends relevant to small and medium sized city centres. For the responsible decision makers in Košice this “trend check” should be a quick and general orientation aid how “trendy” the city centre is.

Košice’s trend affinity is assessed using a simple traffic light system:

“trend check” colour	description
	<ul style="list-style-type: none"> ▶ no “trend affinity” ▶ (still no trend approaches visible)
	<ul style="list-style-type: none"> ▶ moderate “trend affinity” ▶ first trend approaches visible
	<ul style="list-style-type: none"> ▶ high “trend affinity” ▶ city centre is right on trend

location trends	trend affinity		
Trend 1 - Shopping experience The city as a networked experience shopping location (shopping, culture, gastronomy, services) with emotional stimulation			
Trend 2 - Service as a chance to distinguish yourself Clear profiling of inner-city retail via top service and specialist advice			
Trend 3 - New city centre affine target groups Addressing new inner-city target groups such as LOHAS, DINKs, silver surfers, etc.			
Trend 4 - Multi- & cross-channel Online and offline multi- and cross-channel strategies of local companies are considered a major competitive advantage of city centres			
Trend 5 - New retail city formats e.g.: convenience-shops (products to go) and sustainability-shops (e.g.: repair-shops)			
Trend 6 - Worlds of food enjoyment High quality specialist suppliers in the food sector in combination with tastings			

location trends	trend affinity		
Trend 7 - owner-managed flagships High-quality, interesting products combined with lifestyle and/or feel-good concepts			Red
Trend 8 - Digitalisation of sales areas Digital technologies and "location-based services" determine shop concepts			Red
Trend 9 - Investment boom for city hotels New city hotel concepts contribute to the offer mix of a city or city centre			Red
Trend 10 - Alternative accommodation concepts e.g.: albergo diffuso for subsequent use of vacant residential and business units		Yellow	Red
Trend 11 - Experience and theme gastronomy Food as an experience by involving the guests in the preparation as well as special catering locations	Green		
Trend 12 - Urban gastronomy concepts Various food concepts such as. Infinite food, spiritual food, etc. reflect the lifestyles of various inner city centre target groups	Green		
Trend 13 - Day Tourism - Positioning Clear, day-tourist positioning of city centres as a strategy for additional absorption of purchasing power		Yellow	Red
Trend 14 - Leisure structures in the inner city Sports and leisure infrastructures are returning to the city centres such as motor parks, amusement arcades, cinemas, etc.		Yellow	
Trend 15 - Local quality labels Local quality labels strengthen competitiveness and help SMEs to position themselves			Red
Trend 16 - Co-working Alternative vacancy utilisation through co-working spaces and (ideally) simultaneous promotion of the creative industries	Green	Yellow	
Trend 17 - Educational institution as impulse generator Schools, nursery schools and universities are increasingly returning to the city centres	Green	Yellow	
Trend 18 - "one stop shop"- town centre marketing A professionalised town centre marketing with integration of location, tourism and cultural marketing agendas			Red
Trend 19 - Cultural sites as "landmarks" Architecturally sophisticated event locations or museums become inner-city magnet points		Yellow	
Trend 20 - Image-shaping events The city as a stage or playground for new events in the leisure and cultural sector	Green		
Trend 21 - Media libraries Increased development of municipal libraries in the digital field as a multifunctional educational centre			Red
Trend 22 - Digital city paths Communicating urban history and culture through "virtual" circular routes	Green		
Trend 23 - Innovative forms of inner-city living New inner-city housing forms for different target groups such as: temporary housing, micro-apartments, modern heritage			Red
Trend 24 - Attractive "start up" scene The city centre as attractive location for young company founders	Green		

4. The pilot location/project - remarks and comments

As part of the CINEMA project, Košice is focusing on a local pilot project in the field of “empty floorspace”. The central aim is getting new utilization through Creative Industry enterprises and “start ups” for the **Tabačka Kulturfabrik**.

On the basis of the results and impressions of the on-site inspections, the several talks with decision makers of the “CI community” in Košice, the data transmitted and the technical know-how of the CIMA, the following remarks can be given:

- ▶ The envisaged project in the former tobacco factory is very professionally prepared, based on well-founded potential (relevant university education on site, already existing large creative industries scene, etc.) and fully corresponds to the objectives of the CINEMA project - revitalisation of urban zones through creative industries.
- ▶ The planned uses and combinations with existing offers are also very coherent and promising in the long term. CIMA believes that a vibrant, creative microcosm of creative industries, cultural and gastronomic uses will be created here.
- ▶ The location of the project is well chosen and there is also potential for expansion and extension. As a further frequency and revitalisation factor for the nearby inner-city core zones, it seems reasonable to economically revitalise individual vacant houses at the upper end of “Hlavná”, which were also offered for sale at the time of the tour, and thus create a lively “connecting axis” between the Tabačka Culture Factory and “Hlavná”.
- ▶ With regard to a good organisational and marketing cooperation with the city centre businesses, CIMA suggests that the existing creative business association “STROJ” opens up and also offers membership to city centre businesses. This can also close the current “gap” of the non-existence of a separate local inner-city business association.

5. Further measures and proposals for the city centre

A sustainable economic revitalisation of a city centre represents a concentrated development process over several years and is usually based on a combination of different real estate, urban planning and organisational measures. To support the pilot project, CIMA recommends the following additional accompanying measures.

further measures	description
Installation of a professional Town Centre Marketing unit	<p>Similar to many other, same structured European cities, it seems to make sense for Košice to install a professional Town Centre marketing unit, which should focus on location marketing and vacant space management tasks in addition to "classical Town Centre Marketing tasks" (e.g. organising events, developing customer loyalty programmes etc.).</p> <p>Ideally, this Town Centre Marketing organisation should represent a joint body between the city and the local business community.</p> <p>In terms of utilising existing synergies (organisational, monetary and personnel), such a Town Centre Marketing unit could be integrated with existing organisations such as CIKE. This would also enable a holistic development of the city centre and the creative economic zones.</p>
Quality offensive "City Retail"	<p>The "city check" results have also shown, among other things, that there is considerable potential for improvement in the area of product presentation, window displays and shop design at many local retail businesses in the city centre.</p> <p>If necessary, with the involvement of interested creative industries, qualification offers in the form of seminars and workshops should be offered here, which</p>

	should be open to all interested city centre retail businesses.
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