LEONARDO DA VINCI

TransCONVER

Training and Guidance Module for Local Coal Conversion in Enlarging Europe

WORK PACKAGE 6

WORK PACKAGE 11

Module 1

Regional Development, Structural Policy and Re-conversion Models

Karviná 2003
"This project has been carried out with the support of the European Community."
"The content of this project does not necessarily reflect the position of the European Community or the National Agency, nor does it involve any responsibility on their part."

© Ing. Marian Lebiedzik, CSc.

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1. **Work Package 6**

1.1 **Training and Guidance Module**  
* (Methodological Guide)

1.1.1 **Introduction**

The “Leonardo da Vinci” pilot project "TransCONVER" was created as a complement to the Phare Initiative of the European Union. The strategic aim of this project is to contribute to the rational restructurialization of the coalmining regions in Poland and in the Czech Republic. The TransCONVER project intends in this sense to offer a possibility of more systematic activities in reconversion-training, with the synergies and experience of western European partners. The project therefore, being based on the expertise of the partners from Western Europe, should facilitate citizen’s entrepreneurship in the particular target regions by emphasizing the significance of small and medium free enterprise. In a long run it also foresees the creation of a European co-operation system of all industrialised regions of Eastern and Western Europe with a particular emphasis on the potential role of local regional partnerships.

1.1.2 **Objectives of the project are as follows:**

- Improve the skills and competences of local leaders like innovators, training practitioners and developers of conversion strategies.
- Promote innovative studies, testing and approving new ways of professional training instructing local trainers, leaders and counsellors.
- Improve the quality of, and access to, continuing vocational training to people in heavy industrial areas facing structural changes.
- Promote and reinforce the contribution of vocational training to the process of innovation.
- Introduce training products for the public and private sector (web sites, distance and multimedia education) with the use for example of a pragmatically oriented guidance module for the local conversion partnership (link to module page).
- Verify Western and Eastern European experiences in the field of heavy industrial restructuring and their connection with the processes of the EU enlargement and globalisation.
- Formation of European Coal Conversion Partnerships at local level to create the structures that will enable effective solving problems of restructuring in the European context.

1.2 **Definition of the Work package 6**

The Work Package 6 presents a methodological framework for the Training and Guidance Modules. It proceeds from the processed Need and Skill Analysis of the project (see www.transconver.com) and contains the following parts

- Methodological approach
- Target regions description
Training and Guidance Module

- Target groups description
- Overview of the specifications of the skills for re-conversion
- Overview of the particular Training and Guidance Modules
- Structure of the particular Training and Guidance Modules

1.2.1 Target Regions

TransCONVER is based on three regions: Upper Silesia (including the Wałbrzych region) in Poland, Ostrava/Karviná region in the Czech Republic and the Ruhr District in Germany. Knowledge about these regions with information on the local situation is provided by each partner and is the basis for working-in the project. At the working meetings in Bytom and Karviná during 2001, experts from a variety of fields related to regional development presented specific issues in order to give an overview over up-to-date problems of their region.

1.2.2 Target Groups

Training and Guidance Modules consist of partial training modules, which come out of the carried out need and skills analysis of the defined target groups.

The target groups are the following groups:

1. Municipality representatives
2. Large company managers
3. Managers of medium and small enterprises (SMEs)
4. Public institutions representatives
5. Non-governmental representatives and non-profit organisation representatives (NGO)
6. Teachers
7. Students

1.2.3 Specific Skills for Re-conversion

The need analysis and skills for re-conversion results of the above mentioned target groups were elaborated using a questionnaire in Upper Silesia and Ostrava/Karviná regions and they are available on www.transconver.com. Regional development partial studies, scientific outputs of other projects and programmes and dissertations (reference can be found at the same address) are additional sources for the need and skills assessment.

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1 The names of the target region in the Czech Republic are stated differently in connection with the change of the administration system in the Czech Republic in 2001. In the project occur the following names: Ostrava/Karviná region (used before the change) and Moravian-Silesian region (used after the change).
The list of specific skills for re-conversion is as follows:

1. Possibility of the project presentation of the re-conversion nature (projects solving the re-conversion processes).
2. Competence to handle in implementing the re-conversion projects (especially with the orientation on the human sources).
3. Competences of finding information on the projects aimed at the re-conversion policy (public support of the endangered regions).
4. Team work competence, cooperation and project management of the SPO nature (cooperation of state and private organisations).
5. Ability to interpret and classify information according to its meaning for the projects of the structural re-conversion innovation.
7. Managing, assessing and motivating of the employees in realizing the re-conversion strategies (including the training and creation of the employer’s support).
8. Competencies of the use of models and good examples in the conversion strategies.
9. Competence of the programming and realization of the training measures in the conversion strategies.
10. Creative skill strategic thinking including the innovation management in defining the re-conversion processes.
11. Handling of marketing techniques (special product and consumer marketing), medialization skill in the conversion strategies.
12. Virtual team work with the application of information means, project management of the conversion processes in the virtual environment.
13. Capability of applying the principles and techniques of the environment to the problems of the structurally affected regions.
14. Evaluation capability of the legislative aspects in the re-conversion strategies.
15. Handling capability of the waste economy in regenerating the environment.
16. Preparation competence of the educational offer in relation to the required professional competences in changing the job position.
17. Creation capability of the cooperation system with social partners integrated into the re-conversion process.
18. Application capability of the European educational standards in preparing the training courses solving the re-conversion problems.
19. Competence of learning and developing possibilities in the service sector (especially in tourism) in solving the creation of new jobs.
20. Capability of applying the partnership principles of the state and public administration in the tourism projects.
21. Competence of creating the service products (tourism) and product packages of these services in searching for new assertion possibilities of new employees.
22. Capability of applying the financial means from the public and private sector for realizing own projects.
23. Orientation capability in the regional re-conversion priorities in relation to investments.
24. Capability of defining the regional development and its prerequisite in the conditions of the re-conversion strategy.
25. Ability of specifying the task of the municipalities within the regional policy solving the re-conversion problems.
26. Ability of defining the institutional security of the regional EU policy in specifying the structurally affected regions.
27. Essential abilities, which I would like to develop

Six training modules have been elaborated based on the need and skill analysis, which cover the basic problematic areas of re-conversion process in the above mentioned regions. These training modules have been tested on samples of the defined target groups in Ostrava/Karviná region and in Upper Silesia.

All materials of Work Package 6 are available to all partners and trainers in paper and electronic version.

1.3 Links to other project products

Work Package 6 is linked to other project products, especially to:

- **Work Package 11**
  The Work package 6 presents the conceptualizing of the Training and Guidance Modules and the essential methodological framework for the Work Package 11. The Work Package 11 is a complete Training and Guidance Handbook, which comprises the partial modules oriented according to the conclusions of the Need and Skill Analysis.

- **Work Package 4**
  Virtual Coal Web Site, which supports the project as whole and at the same time it provides partial information about old industrial regions, best practices and case studies from re-conversion and other additional information for WP 6 modules and Work Packages 11.

- **Work Package 5**
  Definition of need and skills tools, applying skills and sources into the project and performing needs analysis and determining priorities for future development of the project.

- **Work Package 7**
  Virtual Coal, on-line training module comparing conditions of the re-conversion process in old industrial regions. It is available in electronic version on project web site ([www.transconver.com](http://www.transconver.com)) and also on CD.
• Work package 8
  Testing phases I and II for Training and Guidance Modules. Work Package 11 and Work package 7 on-line module were tested in target groups 1-7.

1.4 Training and Guidance Modules

The following training modules have been compiled based on the need and skills analysis for the defined target groups:

1. Regional Development, Structural Policy and Re-conversion Models
2. Re-conversion Financial Sources
3. Re-structuring Management Centres
4. Re- structuring Destination Management
5. Re- structuring Environmental Management
6. Transborder Training Module

These modules have a uniform structure; partial differences are based on content and organization specifications of some modules (especially Transborder Training Module). The training modules consist of these parts:

1. Title page
2. Content of the Module
3. Training and Guidance Module (Methodological Guide)
4. Module Profile
   It is a concise resume of a training module and it contains a link to a target group, training skills, other work packages links, modules objectives, modules content and modules context.
5. Course Guide, Session Guide and Session Plans
   Features content and time schedule of a training, trainings methods, ways of assessment and work and a module evaluation.
6. Handouts
   They are structured aids for each session within a Session Guide. They serve a coach as a guide book for preparation and realization of lessons. Handouts have been prepared as Power Point presentations as well.
7. Tool box
   It contains summarizing control questions, exercise suggestions, examples for sessions etc. A coach is presumed to create an additional set of exercises for a specific training depending on variable course parameters.
8. Best Practices
   They are examples from re-conversion field in the target regions. Various Best Practices can be used for a specific training depending on its variable parameters. The summary of all the Best Practices is on www.transconver.com/databases/List of Best Practices, or in the text in English, Czech, German and Polish.

2 The formulation of the names developed in the course of work in particular modules. For that reason it is possible that in some project outputs the slightly different module names are stated.
9. Case study
Each module includes one or more case studies focused on the problems of the given module. Each case study consists of a focus on activity, content, context case, a link to target groups, results and the way of financing. Navigation for training is an important part of a case study. It gives recommendations for a group work, individual training, training methods and forms and assessment.

A handbook serves as an additional study text for course participants and it is intended for individual self-study training. It contains a link to other project products, in-depth explanation of a given module problems, general European experiences in the field of the module with specific experiences from the Czech Republic and Poland. Navigation for training is an integral part of any handbook.

11. The Questionnaire for WP 6 modules Evaluation
A standardized questionnaire is a part of each training module. It serves as a feedback for authors of the modules and a coach (enclosed). It determinates a benefit of particular modules from a viewpoint of content and professional focus of respective target groups.

1.5 Guide for Training and Guidance Modules

Training and guidance modules do not represent close rigid units. In regard to TransCONVER pilot character the Work Package 6 should be modular and flexible enough in the following parameters, which are therefore considered variables:

- target groups
- needs and skills orientation
- content
- training form and organization
- exercises, questions, assessments

Each training module is preferably intended for a certain target group. The link to each module target group is in a Course Guide section. Each target group may be further internally differentiated for certain training, especially according to the number of participants of training, a level of their knowledge of a problem, hierarchy plane, position etc. Each training module answers concrete needs of a certain target group and tries to develop predetermined skills for re-conversion. The link to each module need and skills is specified in a Module Profile section. The coach sets up the specifications and preferences of the trained skills in relation to other variable parameters. Each module includes a recommended form and training organization, suggestions for exercises, discussions and individual work for the training participants.
2 Work Package 11

2.1 Module Profile

Target groups:
- Municipality representatives
- Non-governmental representatives and non-profit organisation representatives (NGO)
- Public institutions representatives
- Teachers
- Students
(The module is particularly determined for development agencies, town and municipality associations, Euro-regions, labour bureaus)

Skills and knowledge to be taught:
1, 3, 4, 5, 8, 9, 10, 12, 14, 17, 22, 23, 24, 25, 26 (the list skills and knowledge – see part one - Methodological Guide).

Links to Work Packages:
- Work Package 5 www.transconver.com
- Work Package 6 www.transconver.com
- Work Package 7 www.transconver.com
- Work Package 8 www.transconver.com
- Work Package 10 www.transconver.com

Course objectives:
- To define the theoretical approaches of the regional policy, including the participants’ familiarity with the essential regional development theories and their applications in practice.
- To define the regional development and to specify the methods of its evaluation.
- To make the participants familiar with the exerted regional policy in the Czech Republic and European Union.
- To identify the essential aid forms from the EU for the member states (and individual regions) in the area of the regional development, including the defining of their institutional securing and realisation procedures.
- To apply the regional policy of the European Union and its instruments to the conditions of the Czech Republic and Moravian-Silesian Region.
To specify the role and significance of the municipalities within the regional policy, including the condition concretisation for the Moravian-Silesian Region.

Course content:

1. Regional economy and policy
   - Region, its development and economic growth.
   - Main determinants of the region development, the evaluation of the regional development.
   - Theoretical concepts clarifying the regional development (export basis theory, neo-classical theory, polarisation theory, innovation theory, regulatory theory).
   - Regional policy, its instruments and essential strategies.

2. Practical regional policy – comparison of the Czech Republic and the European Union
   - Regional policy in the Czech Republic before the year 1990 and following the year 1990.
   - Regional policy in the European Union:
     - Development of the regional policy in the European Union.
     - Instruments of the EU regional policy.
     - EU aid forms, their realisation procedures and institutional securing.

3. The Czech Republic and its preparation for making use of the aid from the structural funds of the European Union.
   - EU pre-structural funds and their role in the regional policy of the Czech Republic.
   - Institutional securing of making use of the aid from the structural funds.
   - Realization procedures of the aid from the structural funds and documentary preparation.

4. The Moravian-Silesian Region and its participation possibilities in the aid from the sources of the European Union
   - The role of the regional policy of the EU in restructuring the region.
   - Essential programme documents and realisation procedures of making use of the aid from the funds and programmes of the European Union.

5. The significance of the municipalities in restructuring the Moravian-Silesian Region
   - The role of the municipalities and towns in the regional policy and region restructuring.
   - The participation of the municipalities and towns in the sources of the European Union.
Course context
Since the year 1990, the development in the particular regions has been considerably manifested in the Czech Republic. The causes of this development can be both seen in transforming the Czech economy to the standard market economy, and in various starting conditions of the Czech regions, along with the long-term non-performance of the appropriate regional policy.

The region, which has been extensively affected by the structural changes of the economy and which currently faces the high unemployment rate is the Moravian-Silesian Region. The solution of the status quo is not an easy task, which requires not only a great quantity of financial means but also the appropriate knowledge of all the interested and responsible persons.

An important starting point, in drafting the adequate measures, is the understanding of the causes of the arisen interregional differences. Theoretical concepts of the regional development deal with the substantiating of these differences, along with the possibilities of their solution, on which basis then the essential strategies and regional development instruments are created. It is evident from the context that the creators of the regional policy find it very difficult not to do without the given pieces of knowledge.

The regional development concepts evolved throughout the years in dependence on the condition changes of the world economy and on the problems, which these changes had brought along. An appropriate practical example, on which basis it is possible to demonstrate the given development is the forming of the approach towards the regional policy in the European Union. The Czech Republic will become a member of this integration grouping in the year 2004, and will thus involve into the regional policy applied within the European Union. From that viewpoint it is necessary for the interested persons in the realisation of the regional policy measures to dispose of the knowledge of this policy, including its instruments, aid forms, realisation procedures, and institutional securing.

Since one of the principles, on which the functioning of the EU regional policy is based is also the subsidiarity principle, i.e. individual municipalities and primarily the regions themselves play a crucial role within this policy, the overview of the roles, along with the possibilities and duties of the representative bodies of the given territorial self-government units in the regional policy appear inevitable.
2.2 Course Guide, Session Guide and Session Plans

2.2.1 Course Guide

<table>
<thead>
<tr>
<th>Subjects:</th>
<th>Comments:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Target group</strong></td>
<td>• Municipality representatives</td>
</tr>
<tr>
<td></td>
<td>• Non-governmental representatives and non-profit organisation representatives (NGO)</td>
</tr>
<tr>
<td></td>
<td>• Public institutions representatives</td>
</tr>
<tr>
<td></td>
<td>• Teachers</td>
</tr>
<tr>
<td></td>
<td>• Students</td>
</tr>
<tr>
<td>(The module is particularly determined for development agencies, town and municipality associations, Euro-regions, labour bureaus)</td>
<td></td>
</tr>
</tbody>
</table>

**Learning objectives for target group**

Classroom, Projector and Flip-chart, pens.

**Methodology (training approach)**

Instruction, dialogue in plenum

**Number of participants**

15

**Language**

Czech

**Programme material**

**Programme construction**

<table>
<thead>
<tr>
<th>Sessions</th>
<th>Title</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Introduction</td>
<td>20 minutes</td>
</tr>
<tr>
<td>02</td>
<td>Regional policy and economy</td>
<td>60 minutes</td>
</tr>
<tr>
<td>03</td>
<td>Regional policy in the Czech Republic</td>
<td>30 minutes</td>
</tr>
<tr>
<td>04</td>
<td>EU regional policy</td>
<td>60 minutes</td>
</tr>
<tr>
<td>05</td>
<td>Preparation of the Czech Republic for making use of the aid from the EU structural funds</td>
<td>60 minutes</td>
</tr>
<tr>
<td>06</td>
<td>Participation of the Moravian-Silesian Region in the EU financial sources</td>
<td>60 minutes</td>
</tr>
<tr>
<td>07</td>
<td>Significance of the municipalities in restructuring the Moravian-Silesian Region</td>
<td>90 minutes</td>
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**Time schedule for the Training Programme**

- see programme:
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<tr>
<th>Sessions</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
</tr>
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<tr>
<td>Session 08,30-09,45</td>
<td>Session 01 Introduction</td>
<td>Session 04 EU regional policy</td>
<td>Session 07 Importance of the municipalities in restructuring the Moravian-Silesian Region</td>
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<td>Session 10,00-11,45</td>
<td>Session 02 Regional policy and economy</td>
<td>Session 05 Preparation of the Czech Republic for making use of the aid from the EU structural funds</td>
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<td>Session 12,30-13,45</td>
<td>Session 03 Regional policy in the Czech Republic</td>
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<td>Session 14,00-15,45</td>
<td>Session 06 Participation of the Moravian-Silesian Region in the EU financial sources</td>
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<td></td>
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</tbody>
</table>
### Session Guides

#### Session Guide 01

**Introduction**

**Subject Description**

Acquainting the course participants with the trainer. The discussion with participants concerning the course contents, teaching methods, which will be applied, and objectives of the given course.

**Subject Purpose**

Upon completion of this subject, the participants should have acquired the following Skills, Knowledge, and Attitude:

<table>
<thead>
<tr>
<th>Skills</th>
<th>To enable the participants to take part in developing the curriculum for the course.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge</td>
<td>Knowledge of the methodology of the workshop and the content.</td>
</tr>
<tr>
<td>Attitude</td>
<td>Establishing the personal contact with trainers. Open minded and positive one.</td>
</tr>
</tbody>
</table>

**Subject Objectives**

Upon completion of this subject, the participants should have acquired the following Skills, Knowledge, and Attitude:

**Contents**

See Session Plan

**Resource persons (trainers)**

Ing. Marian Lebiedzik, Ph.D.

**Duration**

20 minutes

**Methodology**

Instruction, dialogue in plenum.

**Facilities and Equipment**

Classroom, Projector and Flip-chart, pens.

**Materials**

Course Guide, Hand-out 01

**Assessment**

**Validation criteria**

Understanding of the curriculum outline. Knowledge of the expectations of participants and trainers.

**Validation methods**

Plenum discussions and feedback.

**Notes**

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<table>
<thead>
<tr>
<th>Session Guide 02</th>
<th>Subject Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional economy and policy</td>
<td>The definition of the essential terms referring to the regional economy and policy. The brief characteristics of the key theoretical concepts clarifying the regional development. The definition of the most essential instruments of the regional policy and their application in practice.</td>
</tr>
</tbody>
</table>

**Subject Purpose**

Upon completion of this subject, the participants should have acquired the following Skills, Knowledge, and Attitude:

- **Skills**: To analyse the causes of the regional disparities and to select the appropriate instruments for eliminating them on the basis of the theory knowledge.
- **Knowledge**: Theoretical concepts of the regional development and applied instruments of the regional policy.
- **Attitude**: To apply the theoretical pieces of knowledge of the regional policy in practice.

**Subject Objectives**

**Contents**

See Session Plan

**Resource persons (trainers)**

Marian Lebiedzik

**Duration**

60 minutes

**Methodology**

Instruction, dialogue in plenum.

**Facilities and Equipment**

Classroom, Projector and Flip-chart, pens.

**Materials**

Course Guide, Hand-out 02

**Assessment**

- **Validation criteria**: Application of the individual instruments of the regional policy and pieces of knowledge of the theoretical approaches towards solving the regional disparities.

- **Validation methods**: Plenum discussions and feedback.

**Notes**

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# Session Guide 03
## Regional policy in the Czech Republic

### Subject Description
Brief characteristics of the applied regional policy of the Czech Republic before the year 1990 and after the year 1990.

### Subject Purpose
Upon completion of this subject, the participants should have acquired the following Skills, Knowledge, and Attitude:

- **Skills**: Problem orientations in the practical regional policy of the Czech Republic.
- **Knowledge**: Knowledge of the differences of the approaches towards the regional differences in the centrally planned economy and market economy.
- **Attitude**: To apply the regional policy of the Czech Republic to the solutions of the problematic regions.

### Contents
See Session Plan

### Resource persons (trainers)
Marian Lebiedzik

### Duration
30 minutes

### Methodology
Instruction, dialogue in plenum.

### Facilities and Equipment
Classroom, Projector and Flip-chart, pens.

### Materials
Course Guide, Hand-out 03

### Assessment
- **Validation criteria**: Knowledge of the regional policy of the Czech Republic and its practical application.
- **Validation methods**: Plenum discussions and feed-back.

### Notes
<table>
<thead>
<tr>
<th>Session Guide 04</th>
<th>Subject Description</th>
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<tbody>
<tr>
<td>Regional policy of the European Union</td>
<td>Defining the term of the regional policy in the European Union, the characteristics of its historical formation. Principle specifications of the regional policy, its instruments (structural funds) and conditions for granting aids to the member states within this policy.</td>
</tr>
</tbody>
</table>

**Subject Purpose**

Upon completion of this subject, the participants should have acquired the following Skills, Knowledge, and Attitude:

- **Skills**: Orientation in the area of the EU regional policy.
- **Knowledge**: Overview and functioning of the EU regional policy.
- **Attitude**: To apply the regional policy of the European Union to the solutions of the problematic regions.

**Subject Objectives**

- See Session Plan

**Resource persons (trainers)**

Marian Lebiedzik

**Duration**

60 minutes

**Methodology**

Instruction, dialogue in plenum.

**Facilities and Equipment**

Classroom, Projector and Flip-chart, pens.

**Materials**

Course Guide, Hand-out 04

**Assessment**

- Validation criteria: Knowledge of the main principles of the regional policy of the European Union and its instruments.
- Validation methods: Plenum discussions and feedback.

**Notes**


**Session Guide 05**  
**Preparation of the Czech Republic for making use of the aid from the EU structural funds**

<table>
<thead>
<tr>
<th>Subject Description</th>
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<tbody>
<tr>
<td>To provide information on the institutional and programme preparation of the Czech Republic for making use of the EU structural funds and on the possibilities of obtaining financial means from the pre-accession funds.</td>
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</table>

<table>
<thead>
<tr>
<th>Subject Purpose</th>
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<tbody>
<tr>
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<table>
<thead>
<tr>
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<td>Orientation in the conditions for being granted the aid from the pre-accession funds.</td>
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<table>
<thead>
<tr>
<th>Knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge of the pre-accession funds, the principles on which they function and where to obtain information on these funds.</td>
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<table>
<thead>
<tr>
<th>Attitude</th>
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<tbody>
<tr>
<td>To apply the offer of the financial means from the pre-accession funds.</td>
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<thead>
<tr>
<th>Contents</th>
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<tr>
<td>See Session Plan</td>
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<table>
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<tr>
<th>Resource persons (trainers)</th>
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<tbody>
<tr>
<td>Marian Lebiedzik</td>
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<table>
<thead>
<tr>
<th>Duration</th>
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<tbody>
<tr>
<td>60 minutes</td>
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<table>
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<tr>
<td>Instruction, dialogue in plenum.</td>
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<tr>
<th>Facilities and Equipment</th>
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</thead>
<tbody>
<tr>
<td>Classroom, Projector and Flip-chart, pens.</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Materials</th>
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<tbody>
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<td>Course Guide, Hand-out 05</td>
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<table>
<thead>
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<th>Assessment</th>
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<tbody>
<tr>
<td>Validation criteria: Principles of the functioning of the pre-accession funds.</td>
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</tbody>
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<table>
<thead>
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<th>Validation methods</th>
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<tbody>
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<td>Plenum discussions and feed-back.</td>
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<thead>
<tr>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>
## Session Guide 06
**Participation of the Moravian-Silesian Region in the EU financial sources**

### Subject Description
Familiarising the course participants with the projects financed by the European Union within the Moravian-Silesian Region aimed at the restructuring of the region, including their brief characteristics.

### Subject Purpose
Upon completion of this subject, the participants should have acquired the following Skills, Knowledge, and Attitude:

#### Skills
- To differentiate the types of the individual projects and orientation of their aid.

#### Knowledge
- Knowledge of the individual types of the realised EU programmes within the Moravian-Silesian Region.

#### Attitude
- To select an appropriate programme for solving the specific problem.

### Subject Objectives

### Contents
See Session Plan

### Resource persons (trainers)
Marian Lebiedzik

### Duration
60 minutes

### Methodology
Instruction, dialogue in plenum.

### Facilities and Equipment
Classroom, Projector and Flip-chart, pens.

### Materials
Course Guide, Hand-out 03

### Assessment

#### Validation criteria
Framework knowledge of the possibilities of making use of the financial means within the region and scope of the individual aid types.

#### Validation methods
Plenum discussions and feedback.
### Session Guide 07
**Significance of the municipalities in restructuring the Moravian-Silesian Region**

### Subject Description

To inform the course participants on the possibilities of involving the municipalities into the solution of the regional problems. To apply the theoretical knowledge gained within this course in practice by means of the case study of the realisation of the industrial zone construction in Karviná.

### Subject Purpose

Upon completion of this subject, the participants should have acquired the following Skills, Knowledge, and Attitude:

<table>
<thead>
<tr>
<th>Skills</th>
<th>Knowledge</th>
<th>Attitude</th>
</tr>
</thead>
<tbody>
<tr>
<td>To apply the gained knowledge within the course in practice.</td>
<td>Possibilities of using the EU financial means by the municipalities and towns</td>
<td>To solve the regional problems by the instruments of the municipalities.</td>
</tr>
</tbody>
</table>

### Subject Objectives

Upon completion of this subject, the participants should have acquired the following Skills, Knowledge, and Attitude:

<table>
<thead>
<tr>
<th>Skills</th>
<th>Knowledge</th>
<th>Attitude</th>
</tr>
</thead>
<tbody>
<tr>
<td>To apply the gained knowledge within the course in practice.</td>
<td>Possibilities of using the EU financial means by the municipalities and towns</td>
<td>To solve the regional problems by the instruments of the municipalities.</td>
</tr>
</tbody>
</table>

### Contents

See Session Plan

### Resource persons (trainers)

Marian Lebiedzik

### Duration

90 minutes

### Methodology

Instruction, dialogue in plenum.

### Facilities and Equipment

Classroom, Projector and Flip-chart, pens.

### Materials

Course Guide, Hand-out 07, Case study

### Assessment

<table>
<thead>
<tr>
<th>Validation criteria</th>
<th>Validation methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge of the municipality assertion within the regional policy</td>
<td>Plenum discussions and feedback</td>
</tr>
</tbody>
</table>

### Notes
2.2.3 Session Plans

<table>
<thead>
<tr>
<th><strong>Session Plan 1</strong></th>
<th><strong>Introduction</strong></th>
<th><strong>Duration</strong></th>
<th><strong>20 minutes</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Main topics</strong></td>
<td><strong>Sub-topics</strong></td>
<td><strong>Time</strong></td>
<td><strong>Notes</strong></td>
</tr>
<tr>
<td>1. Information of the workshop schedule and purpose</td>
<td>• Topics and methodology, Time schedule showing sessions Plan and breaks planned.</td>
<td>10</td>
<td>Trainer</td>
</tr>
<tr>
<td>2. Presentation of the trainer</td>
<td>• Distributing CVs and small oral presentations.</td>
<td>5</td>
<td>Trainer</td>
</tr>
<tr>
<td>3. Presentation of participants</td>
<td>• Each participant will give a very brief presentation, name, occupation and organisation. Writing down name cards on A4 paper.</td>
<td>5</td>
<td>Participants</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Session Plan 2</strong></th>
<th><strong>Regional economy and policy</strong></th>
<th><strong>Duration</strong></th>
<th><strong>60 minutes</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Main topics</strong></td>
<td><strong>Sub-topics</strong></td>
<td><strong>Time</strong></td>
<td><strong>Notes</strong></td>
</tr>
<tr>
<td>1. Essential terms</td>
<td>• Defining the region, the regional development and its main determinants&lt;br&gt;• Specification of the essential indicators of the regional development and regional differences</td>
<td>15</td>
<td>Trainer</td>
</tr>
<tr>
<td>2. Characteristics of the essential theoretical concepts of the regional development</td>
<td>• Defining the main developmental stages of the regional policy&lt;br&gt;• Neo-classical and two-sector models&lt;br&gt;• Pole theory&lt;br&gt;• Unbalanced development theory&lt;br&gt;• New endogen growth theory&lt;br&gt;• New trade theory&lt;br&gt;• Theory of the learning regions</td>
<td>25</td>
<td>Trainer</td>
</tr>
<tr>
<td>3. Instruments and essential strategies of the regional policy</td>
<td>• Motives for realizing the regional policy&lt;br&gt;• Classification of the instruments of the regional policy&lt;br&gt;• Characteristics and efficiency of the individual instruments of the regional policy</td>
<td>20</td>
<td>Trainer</td>
</tr>
</tbody>
</table>
# Session Plan 3

## Regional policy in the Czech Republic

<table>
<thead>
<tr>
<th>Main topics</th>
<th>Sub-topics</th>
<th>Time</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Characteristics of the regional policy of the Czech Republic</td>
<td>• Regional policy in the Czech Republic before the year 1990&lt;br&gt;• Regional policy in the Czech Republic after the year 1990</td>
<td>15</td>
<td>Trainer</td>
</tr>
<tr>
<td>2. Institutional securing of the regional policy</td>
<td>• Subjects of the regional policy and their competencies&lt;br&gt;• Programme securing of the regional development</td>
<td>15</td>
<td>Trainer</td>
</tr>
</tbody>
</table>

## Session Plan 4

## Regional policy in the European Union

<table>
<thead>
<tr>
<th>Main topics</th>
<th>Sub-topics</th>
<th>Time</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Forming of the regional policy in the EU</td>
<td>• Characteristics of the individual developmental stages of the regional policy in the European Union and respective objectives of this policy.</td>
<td>20</td>
<td>Trainer</td>
</tr>
<tr>
<td>2. Instruments and principles of the regional policy</td>
<td>• Functions of the individual EU structural funds&lt;br&gt;• Defining the principles of the regional policy</td>
<td>20</td>
<td>Trainer</td>
</tr>
<tr>
<td>3. Realisation and institutional securing of the EU regional policy</td>
<td>• Territorial units for the realisation of the regional policy (NUTS)&lt;br&gt;• Regional developmental plan&lt;br&gt;• Community’s initiatives&lt;br&gt;• Innovative measures</td>
<td>20</td>
<td>Trainer</td>
</tr>
</tbody>
</table>
### Session Plan 5

<table>
<thead>
<tr>
<th>Main topics</th>
<th>Sub-topics</th>
<th>Time</th>
<th>Notes</th>
</tr>
</thead>
</table>
| 1. Preaccession EU programmes and their task in the regional policy of the Czech Republic | • Phare  
• ISPA  
• SAPARD                                                                 | 20   |       |
| 2. Institutional and programme preparation of the Czech Republic           | • Defining the regions for the purposes of the regional and structural policy in the EU and the Czech Republic  
• Operation programmes and their brief characteristics  
• Institutional aid securing  
• Realisation procedures                                                | 40   | Trainer |

### Session Plan 6

<table>
<thead>
<tr>
<th>Main topics</th>
<th>Sub-topics</th>
<th>Time</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Characteristics of the Moravian-Silesian Region</td>
<td>• Analysis of the socio-economic indicators of the given region</td>
<td>10</td>
<td>Trainer</td>
</tr>
<tr>
<td>2. Programmes of the regional development in Moravian-Silesian area</td>
<td>• Analysis of the realisation benefits of the individual projects within the Moravian-Silesian Region</td>
<td>50</td>
<td>Participants + Trainer</td>
</tr>
</tbody>
</table>
### Session Plan

#### Significance of the municipalities in restructuring the Moravian-Silesian Region

**Duration**: 90 minutes

<table>
<thead>
<tr>
<th>Main topics</th>
<th>Sub-topics</th>
<th>Time</th>
<th>Notes</th>
</tr>
</thead>
</table>
| 1. Task specification of the municipalities and towns within the regional policy | • Significance of the municipalities and towns in the regional policy of the European Union, their goals in this area  
• Task of the municipalities and towns in the ongoing restructuring of the economy in the Moravian-Silesian Region | 15 | Trainer |
| 2. Analysis of the case study of the construction of the industrial zone in Karviná | • Making familiar with the realisation method of the construction project of the industrial zone in Karviná and its results.  
• Consecutive analysis of the individual measures and results of the given project.  
• Searching for further methods and procedures of the realisation of the similar projects and their application in the conditions of the regional EU policy | 60 | Participants + Trainer |
| 3. Final evaluation of the entire course | • Course participants’ remarks concerning the course procedure  
• Discussions referring to the proposals its further improvement | 15 | Participants + Trainer |
2.3 Handouts

HANDOUT 01

*Topic:* Introduction

*Course name:* Models of the re-conversion process

*Teachers:* Ing. Marian Lebiedzik, Ph.D.
Silesian University in Opava
School of Business Administration in Karviná

*Course objectives:*
- To define the theoretical approaches of the regional policy, including the informing the university students on the essential regional development theories and their applications in practice.
- To define the regional development and to specify its evaluation methods.
- To make the university students familiar with the exerted regional policy in the Czech Republic and in the European Union.
- To identify the essential forms of the EU aid to the member states (and individual regions) in the area of the regional development, including the definition of their institutional securing and realisation procedures.
- To apply the regional policy of the European Union and its instruments to the conditions of the Czech Republic and Moravian-Silesian Region.
- To specify the role and significance of the municipalities within the regional policy, including the concretisation in the conditions of the Moravian-Silesian Region.

*Course content:*

1. Regional economy and policy
   - Region, its development and economic growth.
   - Main determinants of the region development, the measurement of the regional development.
   - Theoretical concepts clarifying the regional development (export basis theories, neoclassical theory, polarisation theory, innovation theory, regulatory theory).
   - Regional policy, its instruments and essential strategies.

2. Practical regional policy – comparison of the Czech Republic and the EU
   - Regional policy in the Czech Republic before the year 1990 and after the year 1990.
   - Regional policy in the European Union:
     - Development of the regional policy in the EU.
Regional Development, Structural Policy and Re-conversion Models

- Instruments of the regional policy in the EU.
- Forms of the EU aid, their realisation procedures and institutional securing.

3. The Czech Republic and its preparation for making use of the aid from the structural funds of the European Union

- Pre-accession EU funds and their role in the regional policy of the Czech Republic.
- Institutional securing of making use of the aid from the structural funds.
- Realization procedures of the aid from the structural funds and documentary preparation.

4. The Moravian-Silesian Region and its participation possibilities in the aid from the sources of the European Union

- The role of the EU regional policy in restructuring the region.
- Essential programme documents and realisation procedures of making use of the aid from the funds and programmes of the European Union.

5. The significance of the municipalities in restructuring the Moravian-Silesian Region

- The role of the municipalities and towns in the regional policy and restructuring of the region.
- The participation of the municipalities and towns in the sources of the European Union.
HANDOUT 02

**Topic: Regional economy and policy**

**Region**
is a determined territory with the defined aspects, in which there is a specific functional and related infrastructure and a common interest is put through as to the development of the region and improvement of the citizens’ welfare.

**Criteria for defining the regions:**
- **Homogeneity criterion**, according to which such territorial units are united into the homogeneous regions, which are similar as to the specific indicators.
- **Functionality criterion**, which regards the integration basis of the specific territories in their close functional interconnection and mutual dependence.

**Regional development**
is presented by a complex of processes, which take place within the region and contribute principally to the positive changes in the social economic situation of the region.

**Main determinants of the region development:**
- “Active” entrepreneurs, who have found new economic activities,
- “Passive” entrepreneurs, who participate in carrying out the activities of “active” entrepreneurs,
- Physical and social infrastructure, which support the two above mentioned groups of entrepreneurs and provides them with the means of production (job, land, capital).

**Main indicators of the regional development and regional differences:**
- **Economic indicators** (e.g. gross domestic product and its value calculated anew per one citizen, productivity of labour, structure of economy, patent applications per 1 million of citizens, etc.),
- **Indicators of the labour market** (e.g. unemployment rate, unemployment according to sex, age or educational categories, employment etc.),
- **Indicators of the demographic development** (e.g. number of citizens, population density, population according to age, sex, education in % etc.),
- **Indicators of the environment quality** (e.g. air pollution, water pollution, water waste quantity, etc.),
- **Educational indicators** (e.g. numbers of university students, secondary school students, etc.)
- **Infrastructural indicators** (e.g. length of roads, motorways, railways, number of phone connections, etc.),
- **Social indicators** (e.g. number of inhabitants living below the subsistence minimum, number of the health handicapped, number of inhabitants falling to one doctor, etc.)

### Main developmental stages of the regional policy

<table>
<thead>
<tr>
<th>General approach</th>
<th>Prevailing theories of the regional development</th>
<th>Regional policy</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Neoclassic approach (1920-1940)</strong></td>
<td>Regional balance theory (mainly the so called neoclassic models)</td>
<td>Basic idea – “workers for work”, main instruments – instruments increasing the mobility of the workforce</td>
</tr>
<tr>
<td><strong>Keynesian approach (1950-1975)</strong></td>
<td>Regional unbalance theory (e.g. cumulative cause theory, growth pole theory)</td>
<td>“work for workers”, instruments supporting the investment inflows from the private and public sector into the problematic regions (investment subsidiaries, relocation of institutions)</td>
</tr>
<tr>
<td><strong>Neo-Marxist approach (1970-1985)</strong></td>
<td>Regional balance theory (e.g. theory of the special division of labours)</td>
<td>Proposals for the measures were not formed by the Neo-Marxists (in the socialist countries, the regional policy was very effective but at the expense of the loss of external competitiveness)</td>
</tr>
<tr>
<td><strong>Neoconservative approach (1975-)</strong></td>
<td>Regional unbalance theory of the (e.g. path dependence, new growth theory)</td>
<td>“support of the local initiative”, the support of SMEs and medium companies, the decentralization of competencies, deregulation measures,</td>
</tr>
<tr>
<td><strong>Neo-institutional approach (1980-)</strong></td>
<td>Regional unbalance theory (theory of the industrial district, theory of the learning regions)</td>
<td>“cooperation and innovation”, the support of SMEs, the spreading of innovations, networking, the gradualist change of the local institutions based on the study</td>
</tr>
</tbody>
</table>

**What we mean by the regional policy is**
Influencing the economic processes in the individual territorial units (regions) of the state, or a larger territorial unit through the public sector.

**Instruments** of the regional policy can be divided according to the two points of view:
### Objective point of view:

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Implementation of the instruments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Information and consulting</strong></td>
</tr>
<tr>
<td><strong>COMPANIES</strong></td>
<td><strong>Mobility</strong></td>
</tr>
<tr>
<td></td>
<td>Information on the locality, regional marketing</td>
</tr>
<tr>
<td></td>
<td>Localization support</td>
</tr>
<tr>
<td><strong>New jobs</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Bonuses for the job vacancy</td>
</tr>
<tr>
<td><strong>Technologies, innovations</strong></td>
<td>Technological and innovative consulting</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Founding of the new companies</strong></td>
<td>Entrepreneurial consulting</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Cooperation</strong></td>
<td>Cooperation consulting</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Education</strong></td>
</tr>
<tr>
<td></td>
<td>Information on the education possibilities</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Supply</strong></td>
<td>Information on the job offers</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Municipalities – Institutions</strong></td>
</tr>
<tr>
<td></td>
<td>Municipality consulting and regional agencies</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Economic point of view:

- **Macroeconomic instruments of the regional policy** – fiscal policy, monetary policy and protectionism.
- **Microeconomic instruments of the regional policy** – reallocation of the workforce (e.g. costs cover for accommodation, moving or repurchase of real estate) and capital (e.g. investment incentives).
HANDOUT 03

**Topic: Regional policy in the Czech Republic**

**Regional policy until the year 1990:**
- Regional differences were directive by the mobility oriented strategy, i.e. the development of the regions lagging behind was solved by the localisation and placement of enterprises in the given area and the redistribution of the financial means.
- The role of individual enterprises was considerably passive, without any more substantial influence on the strategic and medium-term decision making.
- Similarly, the role of the regional bodies of the public administration (regional and municipal councils) oriented rather on the economy managed by them, whereas the intentions of the regional development were part of the political lobbying towards the bodies of the central decision-making.
- Economic principles of the localisation were intertwined by the non-economic ones (e.g. placements from the military-strategic point of view, offsetting the social and cultural differences), so that the homogenous strategy or theoretical concept is hard to find.
- As to the instruments of the regional policy, the administrative measures were unequivocally preferred (regulation by means of the plan with the passive price position, the currency and finances) and at the same time, the individual instruments of the regional policy were subordinated to these, along with the recipients of this policy.

**Aims of the regional policy after the year 1990:**
*To contribute to the harmonic and balanced development of the individual regions,*
*To support the economic and social development of the individual regions.*

**Subjects of the regional policy:**

*Legislative branches of government (Chambers of Deputies of the Parliament of the Czech Republic and senate)*
*Executive branches of government (the Parliament, central administrative office)*
*Local government authorities (Regional authorities, Municipal authorities)*
*Advisory and coordination authorities (National programme and monitoring committee, Councils for the coordination of the regional development and monitoring committees)*
*Development agencies with the nationwide or regional competencies (e.g. Agency for the entrepreneurship development, CzechTrade, CzechInvest)*
*Industrial and agrarian chambers, interest associations, employer and employee organisations*
*Institutions of the public sector*
*Subjects of the private sector*
Programme securing of the regional development:

- **Strategic and programme documents on the state level:**
  - Long-term concepts of the regional policy
  - Strategic programme of the social and economic development of the Czech Republic
  - Strategies of the regional development of the Czech Republic
  - Government programme of the regional development
  - Sectoral development programme

- **Strategic and programme documents on the region level:**
  - Strategies of the region development
  - Programme of the territorial district

- **Programme documents of the European Union for using the structural funds:**
  - Regional Development Plan
  - Single Programme Document
  - Community Support Framework
  - Sectoral Operation Programme
  - Regional Operation Programme
HANDOUT 04

**Topic: Regional policy of the European Union**

**Objectives of the regional policy in the years 1989-1993:**

Objective 1) the support of the development and structural changes of the regions lagging behind.

Objective 2) the transformation of the regions or their part, which are seriously endangered by the economic decline.

Objective 3) the fight against the long-term unemployment and the integration support of young people and persons eliminated from the labour market into the working process.

Objective 4) the support of the employees’ adaptation to the economic changes and the production changes.

Objective 5) the support of the development of the rural regions.
   a) By speeding up the structural changes in agriculture within the reform of the common agricultural policy and modernisation support and fishery restructuring.
   b) By enabling the development and structural changes of the rural regions.

*In the year 1995, the following range of five objectives was extended by additional ones in connection with the European Union enlargement of another three countries (Austria, Sweden and Finland). The new approved objective relates precisely to the acceptance of two northern countries:*

Objective 6) the development and structural changes of the region with an extreme low density.

**Objectives of the regional policy in the years 2000-2006:**

Objective 1 – The support of the development and structural changes, of which development lags behind

Objective 2 – The support of the economic and social change of the areas, which face the structural problems

Objective 3 – The support of the adjustment and modernisation of the education system, trainings, employment and further measures for the support of the development of the human resources
Principles of the structural policy:

1. *Concentration principle*, which presupposes the concentration of efforts into areas, where the highest evaluation is expected.

2. *Additional principle (complementary)*, which provides for the financing from the structural funds of the Community so that it is not used as a substitution of the national structural subsidies.

3. *Partnership principle*, of which application plays a decisive role in the selection of the projects. The given principle presupposes a close cooperation both among the European Commission and respective bodies on the national, regional and local level specified by each Member State but also among subjects, which participate in making use of the financial means, namely at all stages of the preparation and realization of the support programmes.

4. *Programming principle*, which emphasizes the complex approach towards solving the problematic regions. The means of the funds are allocated on the basis of the perennial and multi-branch programmes put forward by the government of the Member State to the European Commission, and not by reason of particular projects.

5. *Monitoring and devaluation principle* comprises the ongoing monitoring and evaluation of the measures taken and the overall efficiency of the financial means spent.

6. *Subsidiarity principle*, reflecting the fact that responsibility is maximally delegated to the level of the specific reality, where the local conditions can be considered best while realizing the given project.

Instruments of the structural policy:

- *Structural funds*
- *European Social Fund*
- *Agricultural Regulation and Guarantee Fund*
- *European Fund of the Regional Development*
- *Financial instrument for the fishery support*
- *Cohesion fund*
- *European Investment Bank*

Aid forms from the structural funds:

- *National Initiatives*
- *Communities’ Initiatives*
- *Innovation measures*
**Territorial units:**

1. **NUTS I**, is a territorial unit, which covers large areas (countries, micro-regions) of the given state. It is then the largest regional comparative unit and is usually made up of several units of the NUTS II level.

2. **NUTS II** corresponds to the level of the middle article of the territorial administrative subdivision of the given state. The size of these territorial units ranges with the number of citizens from one to two millions of citizens, the EU average is 1.83 million of citizens, the area of the territory is then on average 23,000km² (with smaller territories, the size of the NUTS II territory ranges from 3-10,000km²).

3. **NUTS III**, which is mostly a unit corresponding to the level of the lowest territorial administrative region of the state administration (level of districts or regions). With smaller EU countries, its size oscillates between 200 up to 400,000 citizens; the EU average is 410,000 citizens. The size of the units with smaller countries ranges then from 1 to 3,000km² (EU average is 5,400km²)

4. **NUTS IV**, represents the level of districts, or micro-regions.

5. **NUTS V**, including the level of districts.
Pre-accession aid from the financial instruments PHARE, ISPA and SAPARD

<table>
<thead>
<tr>
<th>Candidate countries in total (yearly, in million EUR)</th>
<th>Czech Republic (Yearly, in million EUR)</th>
<th>Czech Republic (Yearly, in million CZK)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Minimum</td>
<td>Maximum</td>
</tr>
<tr>
<td>PHARE</td>
<td>1 560</td>
<td>37*</td>
</tr>
<tr>
<td>ISPA</td>
<td>1 040</td>
<td>57</td>
</tr>
<tr>
<td>SAPARD</td>
<td>520</td>
<td>22</td>
</tr>
<tr>
<td><strong>In total</strong></td>
<td>3 120</td>
<td>116</td>
</tr>
</tbody>
</table>

* We are dealing here with the amount allocated for the area of industrial and social coherence from the total PHARE allocation amounting to 79 million EUR.

The regulation of the EC Council stipulates that the support from the Structural funds for the Goals 1 (support of the regions with GDP lower than 75% of the EU average) will be granted to the NUTS 2 territorial units. The regions of the Czech Republic, which were established on the basis of the constitutional Act N.247/1997 Coll. on the date of 1st January 2000, are for this purpose too small. Therefore, the Government of the Czech Republic approved the European classification of the NUTS territorial units as a classification CZ – NUTS by adopting the resolution N.707 from 26th October 1998. According to the classification, the area of the Czech Republic is divided into six NUTS levels with the following determination:

- NUTS 0 state (Czech Republic)
- NUTS 1 territory (Czech Republic)
- NUTS 2 area
- NUTS 3 region
- NUTS 4 district
- NUTS 5 municipality
Characteristics of NUTS II in the Czech Republic

<table>
<thead>
<tr>
<th>NUTS II</th>
<th>Area in km²</th>
<th>Population on the date of 1.1. 1997</th>
<th>Population density / km²</th>
<th>Regions in total</th>
<th>Districts in total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Praha</td>
<td>496</td>
<td>1 204 953</td>
<td>2 429</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Střední Čechy</td>
<td>11 013</td>
<td>1 105 234</td>
<td>100</td>
<td>12</td>
<td>1 147</td>
</tr>
<tr>
<td>Ostrava</td>
<td>5 555</td>
<td>1 287 413</td>
<td>232</td>
<td>6</td>
<td>297</td>
</tr>
<tr>
<td>Jihozápad</td>
<td>17 618</td>
<td>1 181 005</td>
<td>67</td>
<td>14</td>
<td>1 128</td>
</tr>
<tr>
<td>Jihovýchod</td>
<td>13 992</td>
<td>1 662 657</td>
<td>119</td>
<td>12</td>
<td>1 373</td>
</tr>
<tr>
<td>Severozápad</td>
<td>8 649</td>
<td>1 130 368</td>
<td>131</td>
<td>10</td>
<td>484</td>
</tr>
<tr>
<td>Severovýchod</td>
<td>12 440</td>
<td>1 492 317</td>
<td>120</td>
<td>13</td>
<td>1 115</td>
</tr>
<tr>
<td>Střední Morava</td>
<td>9 105</td>
<td>1 245 190</td>
<td>137</td>
<td>9</td>
<td>689</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>78 868</strong></td>
<td><strong>10 309 137</strong></td>
<td><strong>131</strong></td>
<td><strong>77</strong></td>
<td><strong>6 234</strong></td>
</tr>
</tbody>
</table>

Source: Ministry for the Local Development

Programme documents:
- National Regional Development Plan (NRDP),
- Community Support Framework (CSF),
- Single Programme Document (SPD) – for Prague,
- Sectoral Operational Programme (SOP),
- Regional Operational Programmes (ROP) – following the EU entry, for the periods of 2004 – 2008 the so called Common ROP.

Managing bodies for making use of the structural funds in the Czech Republic

<table>
<thead>
<tr>
<th>Single Regional Operational Programme</th>
<th>Ministry for the Local Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>OP Industry and Entrepreneurship</td>
<td>Ministry of Industry and Commerce</td>
</tr>
<tr>
<td>OP Infrastructure</td>
<td>Ministry of the Environment</td>
</tr>
<tr>
<td>OP Development of the Human Sources</td>
<td>Ministry of Labour and Social Care</td>
</tr>
<tr>
<td>OP Development of the country and agriculture</td>
<td>Ministry of Agriculture</td>
</tr>
</tbody>
</table>

Source: Ministry fro the Local Development.
Realization procedures of the assistance from the structural funds

In making use of structural funds, there is a shared responsibility between the Commission and the Member State. The cooperation procedure between these two subjects is the following:
A list of the eligible regions
(Elaborated by the Commission)

Regional Development Plan
(RDP)
(Submitted by the member state to the
Commission 4 months at the latest
following the elaboration of the list of

Community Support
Framework (CSF)
(Elaborated by the Commission up to
5 months after presentation of the

Operational Programmes (OP)
(Submitted by the member state to the
Commission; for speeding the
procedure up, these can be submitted
already with the RDP)

Single Programme
Document (SPD)
(Submitted by the member state to the
Commission 4 months at the latest following the elaboration of the list of the regions)

Decision of the Commission
on the SPD
(The Commission accepts the
decision on the SPD 5 months at
the latest after its presentation)

Programme supplement
(Submitted by the member state up to three
months following the approval of the SPD
or the OP)
HANDOUT 06

**Topic: Participation of the Moravian-Silesian Region in the EU financial sources**

Selected micro-economic indicators

<table>
<thead>
<tr>
<th>INDICATOR</th>
<th>1998</th>
<th>1999</th>
<th>2000</th>
<th>2001¹)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross added value in the base prices</td>
<td>183 182</td>
<td>181 334</td>
<td>183 091</td>
<td>200 723</td>
</tr>
<tr>
<td>Net production taxes</td>
<td>21 092</td>
<td>22 025</td>
<td>22 171</td>
<td>23 030</td>
</tr>
<tr>
<td>Gross domestic product in mil. CZK (purchase prices)</td>
<td>204 274</td>
<td>203 359</td>
<td>205 262</td>
<td>223 753</td>
</tr>
<tr>
<td>Gross domestic product in mil. EURO (ECU)</td>
<td>5 624</td>
<td>5 513</td>
<td>5 766</td>
<td>6 568</td>
</tr>
<tr>
<td>Gross domestic product in million PPS</td>
<td>14 014</td>
<td>13 785</td>
<td>14 174</td>
<td>14 863</td>
</tr>
<tr>
<td>Region’s share in GDP of the Czech Republic in %</td>
<td>11,1</td>
<td>10,7</td>
<td>10,3</td>
<td>10,4</td>
</tr>
<tr>
<td>Development of GDP, stable prices 1995, min. year = 100</td>
<td>93,7</td>
<td>95,7</td>
<td>100,7</td>
<td>102,1</td>
</tr>
<tr>
<td>GDP per one citizen in CZK</td>
<td>158 947</td>
<td>158 558</td>
<td>160 367</td>
<td>176 377</td>
</tr>
<tr>
<td>GDP per one citizen in EURO (ECU)</td>
<td>4 376</td>
<td>4 299</td>
<td>4 505</td>
<td>5 177</td>
</tr>
<tr>
<td>GDP per one citizen in PPS</td>
<td>10 905</td>
<td>10 748</td>
<td>11 074</td>
<td>11 716</td>
</tr>
<tr>
<td>HDP per one citizen, Czech Republic = 100</td>
<td>89,0</td>
<td>85,7</td>
<td>83,0</td>
<td>83,6</td>
</tr>
<tr>
<td>GDP per one citizen in PPS, EU - 15 = 100</td>
<td>54</td>
<td>51</td>
<td>49</td>
<td>51</td>
</tr>
<tr>
<td>GDP per one citizen in PPS, CC - 13 = 100</td>
<td>153</td>
<td>148</td>
<td>144</td>
<td>154</td>
</tr>
<tr>
<td>GDP per one citizen in PPS, CECC - 10 = 100</td>
<td>140</td>
<td>131</td>
<td>127</td>
<td>129</td>
</tr>
<tr>
<td>GDP per one citizen in PPS, EU - 25 = 100</td>
<td>62</td>
<td>58</td>
<td>57</td>
<td>58</td>
</tr>
</tbody>
</table>

Comment: 1) We are dealing here with experimental data from the quarterly national accounts

Source: http://www.czso.cz/csu/edicniplan.nsf/p/1371-02

*Further information on the following topic is completely summarised within the Handbook, with which the participants will actively work throughout the course. Topical information will be added in the course of time.*
Handout 07

Topic: The role of the municipalities in restructuring the Moravian-Silesian Region

A sustainable town is the town, which is able to offer the quality environment to its inhabitants, everyone who wants to work, is likely to find a respective job within it, along with the housing, education possibilities for children and the town. Further, the town, which sparingly and effectively uses its and outer sources, deals responsibly with energy and waste, minimises the affects on the environment on the local and global scale. The town, which looks for reciprocally strengthening goals and strategies and realises measures, which:

Will improve the economic vitality of towns, above all in the lagging regions by supporting the innovation, increasing the productivity and using new employment sources not only in smaller and medium-sized towns, but also in large cities and will support the polycentric, balanced European municipal system.

Will enable appropriately access to the results of the increased productivity and competitiveness, it will mitigate the social exclusion and will increase security.

Will contribute to the building of the sustainable towns in relation to the environment and will prevent carrying development costs to the immediate locality, surrounding rural areas etc.

Will support the innovative and flexible decision-making processes and municipal institutions, which will increase the community’s participation in the decision-making process and will integrate the partners’ measures from the public and private sectors, from the European level to the local one, and will boost synergy and cooperation among the existent and institutional processes and sources.
## 2.4 Tool box

### Tool-box 2
**Regional economy and policy**

**Subject Description**

<table>
<thead>
<tr>
<th>Questions</th>
<th>Discussions/Examples</th>
<th>Course paper</th>
</tr>
</thead>
</table>
| 1. Define the REGION and the REGIONAL POLICY.  
2. State and characterize the main determinants of the regional development.  
3. State the main instruments and strategies of the regional policy. | 1. What is the difference between the regional development and the economic growth?  
2. Which theoretical concept clarifying the regional development can you consider presently as the most topical one and why?  
Discussion concerning the possibilities of using individual instruments of the regional policy for solving the regional disparities. | Regional policy and its meaning for the social-economic cohesion |

### Tool-box 3
**Regional policy in the Czech Republic**

**Subject Description**

<table>
<thead>
<tr>
<th>Questions</th>
<th>Discussions/Examples</th>
<th>Course paper</th>
</tr>
</thead>
</table>
| 1. Define the main principles of the regional policy applied in the Czech Republic before the year 1990 and after the year 1990.  
2. Where do you see the main differences in the approach to the regional policy before the year 1990 and after the year 1990?  
3. State main subjects of the regional policy in the Czech Republic and their functions. | 1. Discussions concerning the necessity of the application of the regional policy in the Czech Republic.  
2. Results of the realized regional policy in the Czech Republic after the year 1990 – examples.  
3. Changes in the field of the regional policy in the Czech Republic following its EU entry. | Approaches to the regional policy in the Czech Republic after the year 1990 in the context of its preparation for the EU entry. |
### Tool-box 4
**Regional policy of the European Union**

<table>
<thead>
<tr>
<th>Questions</th>
<th>Subject Description</th>
</tr>
</thead>
</table>
| 1. Characterize the main objectives of the regional and structural policy of the EU.  
2. On what principles does the EU structural policy stand?  
3. State and characterize the EU structural funds.  
4. At what areas is the aid from the Cohesion Fund directed? | 1. Discussion concerning the necessity of the application of the regional policy in the EU.  
2. Results of the realized regional policy in the EU – examples.  
3. Changes in the field of the EU regional policy after its enlargement. |

<table>
<thead>
<tr>
<th>Discussions/Examples</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>The necessity of the reforms of the regional and structural policy of the EU in connection with the enlargement by the new member states.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Course paper</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

### Tool-box 5
**Preparation of the Czech Republic for making use of the aid from the EU structural funds**

<table>
<thead>
<tr>
<th>Questions</th>
<th>Subject Description</th>
</tr>
</thead>
</table>
| 1. State the main programme documents, which the Czech Republic has adopted as a prerequisite for using the aid from the structural funds.  
2. Which institution is held responsible for the effect, the correctness of management, and the carrying out of the aid provided from the structural funds to the Czech Republic?  
3. Which institution in the Czech Republic does perform the function of the payment body for the needs of the aid realization from the EU structural funds?  
4. Describe the realization procedure from the structural funds. |  |

|  |  |
### Discussions/Examples
1. Possibilities of the Czech Republic of using the financial sources from the pre-accession EU programmes.
2. Preparation of the programme documents for the aid from the structural funds in the conditions of the Czech Republic.
3. Analysis and examples of the processed documents.

### Course paper
The Czech Republic in the preparation process for accepting the aid from the EU structural funds.

### Tool-box 6
**Participation of the Moravian-Silesian Region in the EU financial sources**

<table>
<thead>
<tr>
<th>Subject Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Define the position of the Moravian-Silesian Region among other regions of the NUTS II level in the Czech Republic.</td>
</tr>
<tr>
<td>2. What most important projects from the EU sources were realized in the past in the Moravian-Silesian Region?</td>
</tr>
<tr>
<td>3. Which objectives of the EU structural policy will relate to the Moravian-Silesian Region after the integration of the Czech Republic into the European Union?</td>
</tr>
</tbody>
</table>

### Questions
1. Characteristics of the Moravian-Silesian Region and its position within the regions of Europe.
2. Discussion concerning the possibility of applying the EU structural aid in the Moravian-Silesian Region.
3. Examples of the realized pre-accession EU programmes within the Moravian-Silesian Region.

### Course paper
Possibilities of the Moravian-Silesian Region of participating in the financial means from the EU funds and programmes.
| **Tool-box 7**  
Significance of the municipalities in restructuring the Moravian-Silesian Region | **Subject Description** |
|---|---|
| **Questions** | 1. How can you define the sustainable development of the municipality?  
2. What are the main instruments of the European Union in the field of the development of the municipalities?  
3. What instruments does the Czech Republic use for supporting the development of the municipalities? |
| **Discussions/Examples** | 1. Importance of the regional policy for the development of towns and municipalities.  
2. Industrial zones and their contribution for solving the social-economic problems of the region.  
3. Industrial zone “Nové pole” and its significance for the Karviná micro-region. |
| **Course paper** | Importance of the regional EU policy in the development of the municipalities. |
### 2.5 Best Practices

#### Best Practices documents

<table>
<thead>
<tr>
<th>Link to Best Practices</th>
<th>Aim/Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dortmund Technology Centre</td>
<td><em>Aim:</em> to familiarize participants with the approach to restructuring Ruhr region, where the SME development was stressed. It is suitable to compare this approach with the solution included in the Case Study. <a href="http://perso.wanadoo.fr/cerrm/transconver/English/databases/Best_Practices/TZDoneu1.pdf">http://perso.wanadoo.fr/cerrm/transconver/English/databases/Best_Practices/TZDoneu1.pdf</a></td>
</tr>
<tr>
<td>Circa-bussiness Infrastrukture in Silesia-Marklowice</td>
<td><em>Aim:</em> The same as in the above mentioned BP. At the same time we can use the Case Study and compare the approaches of municipalities in Poland and the Czech Republic and their solution of unemployment in their regions. <a href="http://perso.wanadoo.fr/cerrm/transconver/English/databases/Best_Practices/bestpractismarklowice.pdf">http://perso.wanadoo.fr/cerrm/transconver/English/databases/Best_Practices/bestpractismarklowice.pdf</a></td>
</tr>
</tbody>
</table>
2.6 Case Study

1. Identification of case study

| *Name and full contact details of key contact person* | Marian Lebiedzik, Ing., Ph.D.  
Silesian University in Opava  
School of Business Administration in Karvina  
tel.: +420596398248  
fax: +420596312069  
e-mail: lebiedzik@opf.slu.cz |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Keywords</em> (These should also refer to themes relevant to other objectives groups where appropriate)</td>
<td>Industrial zone, the city of Karviná, Czech Invest, marketing strategy, Ministry for Local Development, project, financial contribution, social contribution.</td>
</tr>
<tr>
<td><em>Key priority(ies)</em></td>
<td>The &quot;Karviná - Nové Pole Industrial Zone&quot; project was prepared in consequence of the permanently growing unemployment, which was and still presents the negative effect of the heavy industry restructuring and coal mining attenuation in this region. Not a single investment area was ready to receive an investment plan to build up a new production factory on a greenfield site.</td>
</tr>
</tbody>
</table>
| *Duration* | Date of beginning 1997  
Date of end  
The project is in progress |

3 Please note that it is important to provide the details of an individual who may be contacted by the consultants should they require further information.
These reasons have lead the "Karviná - Nové Pole Industrial Zone" project to be included into the strategic plan of the economic development of the city of Karviná. It was elaborated in cooperation with Barents Group Consultant Company from Washington.

The area of 40 ha in Karviná – Staré Město was chosen in 1997. OKD, a.s. (a mining company) was the main owner, but mining did not affect the site. The city of Karviná and OKD, a.s. made the pre-contract of purchase based on negotiations. The city of Karviná initiated negotiations on the purchase of the respective locations with the minor owners of the remaining parts of the locations.

The city council of Karviná adopted the resolution no. 1535 the "Frame criteria for the assortment of investors for Karviná - Nové Pole Industrial Zone" on 18th November 1997. It was elaborated in cooperation with the CzechInvest government agency.

In June 1998, the Czech government approved the resolution no. 379 and granted state subsidy for the investment preparation (territory development, road adjustment, water supply network, waste-water disposal system, gas piping, and energy output increase) in the total amount of 39,350,000 CZK.

The reasons for granting the state subsidy were:

A generally low level of the investment preparation of the industrial zones in the Czech Republic, which had a negative impact on the inflow of direct investments into industry, Heavy industry restructuring and coal mining attenuation in this region and thus constantly increasing unemployment.

The underground services construction work started in the second half of 1998. The state subsidy of 36,117,000 CZK was granted, the remaining amount of 3 million crowns was summed up together with the money not drawn in 1998 and granted in 1999 in the total amount of 3,875,000 CZK.

A project of factory buildings 2x1000 m² for lease to specific investors was prepared to make the "Karviná - Nové Pole Industrial Zone" more attractive and to increase its competitiveness. The city of Karviná applied for the government subsidy within the "Program of the creation of new employment positions in the inhibited part of OKD". The factory buildings investor is the city of Karviná, which invested its own funds and the state grant of 29 million CZK into the factory buildings.

The contract included the clause stipulating that the financial resources granted from the state budget in the amount of 29 million crowns will create 60 jobs up to the year 2002. The factory building lessee creates the new jobs; the city of Karviná does not do that.
2. **Contextual information of case study**

<table>
<thead>
<tr>
<th><em>Links to TransCONVER project</em> (Links to objectives, needs/skills to be learned, links to other work packages)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karviná is a city in Moravian-Silesian region, where the highest number of mines operated and operate today. In the connection with coal mining attenuation, not only new ways of negative influences elimination of the activity on environment are searched for, but as well ways how to minimize economic and social impacts caused by restructuring of mining industry. In the context of this, besides assistance from the government, activities of the city in the field seem very important. The Case Study points to possibilities of municipalities to join in solving problems, which originated in similarly affected regions.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><em>Links to previous international / national / regional policies / initiatives / projects</em></th>
</tr>
</thead>
<tbody>
<tr>
<td>Moravian-Silesian region was one of important industrial centres in central Europe before 1990. Its exclusive orientation on the heavy industry lead to all kinds of problems (economic, social) evidently of regional type after 1990, in the connection with Czech economy transformation to market economy and modernisation of economic structures. Due to a reticent attitude to regional policy of the governments ruling in the first half of the 90's, the negative impacts of economy transformation are growing to considerably broad dimensions in this region. The municipalities themselves deal with the emerged problems, when at the end of the 90's they try to solve high unemployment with assistance of the government. Karviná is one of the cities, which suffered from insufficiency of national regional policy application the most.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><em>Links to other international / national / regional policies / initiatives / projects (for example, policies on social inclusion, on regional development, on lifelong education, on gender issues, ...)</em></th>
</tr>
</thead>
<tbody>
<tr>
<td>One of important measures, which the government of the Czech Republic uses in the field of regional policy in structurally affected and economically week regions, is assistance offered to municipalities, which prepare so called industrial zones. The zones are supposed to attract foreign and local investors' interest in realization of their business plans in these often to high extend unattractive localities (for different reasons – bad accessibility, bad intelligence structure of people). The measure is accompanied by many investment stimuli (for example the government contributes to the wages of employees, who got their jobs in companies based on given investments or the government offers tax relief for investors). The National employment plan gives traditionally attention to these activities. The government revises the Plan annually and it states the goals, which should be reached on the job market and the tools for their realization. The agency for investment support, CzechInvest, has been set up and its task is, among others, to offer and promote the prepared industrial zones to potential investors in the Czech Republic.</td>
</tr>
</tbody>
</table>
## 3. Content of case study

### *Aims and objectives*

The main goal of "Nové pole" industrial zone realization is to minimise the negative impacts of heavy industry restructuring in Karviná region especially in the unemployment area. It means the main assessment criterion of this project realization is the number of newly created jobs, where not only heavy industry dismissed workers would find their jobs, but others as well.

### *Implementation (programmes, methods, measures and actions)*

In the past, all activities were focused on underground services and the first marketing steps were partially carried out. As a rule, CzechInvest agency arranged meetings with investors. These were mediated contacts with investors coming to the Czech Republic via this agency. Finishing the first construction part (infrastructure), the activities are more focused on marketing. The city of Karviná has printed an advertising brochure "Karviná - Nové Pole Industrial Zone" in Czech and English languages. The English part has information sheets about the city (the list of offices and companies, tax review, the energy costs review etc.). Not only the municipal representatives, but CzechInvest representatives as well distribute these advertising brochures to potential investors.

In order to make the information on "Karviná - Nové Pole Industrial Zone" publicly available and especially available to the potential investors, the DPRD designed a draft of the zone web pages. These are today available in Czech, English and in German and Spanish. Information on "Karviná - Nové Pole Industrial Zone" (www.karvina.org) was sent together with a personal letter to the world Chambers of commerce (direct e-mail) to the USA, Canada, European countries, Australia and others.

Following the experience from personal meetings with investors, a PowerPoint presentation of "Karviná - Nové Pole Industrial Zone" was set up and it is updated when needed. The presentation is made is Czech and English and gives information not only on "Karviná - Nové Pole Industrial Zone", but as well on:

- city transport connections,
- the distance from border crossings,
- working labour structure from the point of view of education, age structure etc.
- unemployment from the point of view of education, age structure etc.
- educational institutions,
- the way of life, i.e. culture and free time activities and possibilities etc.

Today the potential investors are contacted through:

- personal meetings – always the city representatives, the PM or CzechInvest representatives are present,
- the presence at exhibitions and conferences,
- www.karvina.org and www.czechinvest.org
Regional Development, Structural Policy and Re-conversion Models

*Scope or level: international, national, regional, local*

Local

In regard to the success of the industrial zone realization from a viewpoint of its results (CzechInvest agency gave the locality the best rating in its competitions "Zone of the year 2000" and "Zone of the year 2001" in the category of the zone with the best social benefits), the realization proceeding and methods can be recommended for preparation of similar zones in other similarly affected regions.

*Partners involved (in the design, implementation and evaluation of the policy)*

<table>
<thead>
<tr>
<th>Phase</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design phase</td>
<td>the city of Karviná</td>
</tr>
<tr>
<td>Implementation phase</td>
<td>the city of Karviná, Ministry for the Local Development, CzechInvest</td>
</tr>
<tr>
<td>Evaluation phase</td>
<td>the city of Karviná, Ministry for the Local Development, CzechInvest</td>
</tr>
</tbody>
</table>

*Target Group(s) (definition and estimated quantification)*

The target groups, the realization of the project was focused on, can be divided into two groups:

1. Potential investors, whether foreign or local, who should create new jobs in the region.

2. From the viewpoint of the main project goal, which is a wider offer of jobs, people in a given region are the second target group, or dispensible unemployed labour force as case may be. They are especially:
   - workers dismissed due to heavy and mining industry restructuring.
   - graduates, who can hardly find jobs due to limited offer of jobs in a given region.

*Financial support (source: public and/or private; amount, beneficiaries)*

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
<th>Beneficiaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>government</td>
<td>97 mil. CZK</td>
<td>non-profit organizations</td>
</tr>
<tr>
<td>the city of Karviná</td>
<td>118 mil. CZK</td>
<td></td>
</tr>
</tbody>
</table>

*Overhead and other costs incurred by the project*

None
4. **Outcomes and results**

**Perceived strengths** (qualitative and quantitative evidence)

**Outcomes, specific achievements** (qualitative and quantitative evidence)

<table>
<thead>
<tr>
<th>The name of a company</th>
<th>The number of jobs in the period of time of 5 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shimano Czech Republic, s. r. o.</td>
<td>800</td>
</tr>
<tr>
<td>Czech Klinipro s. r. o.</td>
<td>400</td>
</tr>
<tr>
<td>GRADDO, a. s.</td>
<td>321 *)</td>
</tr>
<tr>
<td>Belfort International N.V. V.</td>
<td>130</td>
</tr>
<tr>
<td>Ing. Stanislav Raszyk – DEXON</td>
<td>48</td>
</tr>
<tr>
<td>IN TOTAL</td>
<td>1 689</td>
</tr>
</tbody>
</table>

*Notes:*) the real number of employees in 31. 12. 2002

**The financial benefit of the project realization**

Financial benefit assessment originates in measurable, really spent financial costs. Financial benefit can be considered according to the subject, which the benefit is related to. That is:

**Financial benefit for the state**

The financial benefit can be characterised as *all-society benefit* as well, when there is saving of financial means within reduced unemployment:

- saving of social welfare and benefit entitlement during unemployment,
- financial allowances within the active employment policy.

In the upshot this financial saving makes not negligible saving of the state financial means, which can be reallocated within the state budget to other government departments.

The increase of receivables is the next item of the *all-society benefit* in the field of:

- Social and medical insurance payments.
- Wage-earning tax payments, VAT payments (in case of a VAT payer) etc.

**Financial benefit for the city**

Financial benefit for the city, or *regional benefit*, can be defined more specifically and the originator can be identified. The *regional benefit* can be seen in the following areas:

- **Property tax.** The revenue is paid by land owners, i.e. investors in the area.
- **Operation income tax.** This revenue is further reallocated within the city budget and used for further development.

The revenue from sales of allotments to investors. This revenue is not major revenue to the city budget and does not cover real expenses for sites preparation, but it contributes to the payback of the financial means given into the locality development.

**Overall increase of investments.** This item is more difficult to control, because it is not possible to determine the source (originator) of an investment growth. This item shifts supply and demand of local companies services (the growth of incentives); the companies increase their rentability and maintain jobs or create new ones. For example Karviná companies (Stavokomp, INTEVO Karviná, TZB and others) were sub-contractors on the construction of the industrial premises of Shimano Czech Republic, s. r. o.
**Social benefit**

Social benefit assessment can be characterized as a long term process and thus it is impossible to judge its importance today, four years after the "Karviná - Nové Pole Industrial Zone" project realization started. The social benefit results are the kind of results, where it is difficult to determine the reason of origin (originator) and they often substitute financial results.

The results of the social benefit might be:

*Reduced unemployment rate. The Karviná Employment Office permanently observes and evaluates this figure, but it must be stressed, that the influence of creation and staffing let's say of 200 jobs influences the unemployment rate in the city only in an insignificant manner. Not only should the direct jobs, which can be physically well controlled, be considered. Indirect jobs, which were created as the consequence of new lines of production in the city should be taken into account as well. The statistics quotes one indirect job created as the consequence of one direct job.*

*The increase of living standard of the population This element can be considered only in a long-lasting period of time, but it is impossible to identify the originator. It will be possible to determine the originator only with a small sample of population, which had a direct connection to the creation and staffing of "Karviná - Nové Pole Industrial Zone", it means the employees of the companies operating in the area. In the other cases (local assessment of the increase of the living standard) there might be other factors increasing the living standard of the population as for example the government unemployment policy, increase of the average salaries, decrease of wage-earning income tax, decrease of the inflation rate, the EU entry of the Czech Republic and other.*

*The development of the business atmosphere in the city. Following the existence of investors in the city, new customer-supply relationships will arise. Following the growing buying power there will be new entrepreneurs offering their customers new good quality services, and thus the competitive environment will be revitalized thanks to naturally invoked supply and demand for services. Balancing the supply and demand for services will regulate the prices for the offered services.*

---

**Transferability (in what sense this example may have relevance in the European context?)**

The given project realization is in accord with EU strategy in the employment field, which was created in the course of the 90's and successively incorporated into agreements (especially Amsterdam Treaty) and legislation regulating the operation of the integration organization. There is an effort to ensure all the regions and EU citizens to have the same opportunity to be included into working process and especially by the means of measures oriented on:

- integration support of the long-term unemployed to working process,
- integration support of people endangered of being excluded from a working process,
• helping the young to find a job opportunity when they enter the job market.

All these measures aim to fulfil the regulation of the European social Charta, which requests "everybody to have an opportunity to get means for living doing the job he/she voluntarily chooses".

5. Evaluation criteria

Please specify the evaluation criteria used to select this example as good and add any other relevant comment

The main assessment criterion of the project "Nové Pole" realization is the number of newly created jobs. The level of investment per one job position is an auxiliary criterion, possibly the above mentioned indicators within the part, which is dedicated to the results of a realized project.

Its extraordinarily good results speak for including the project into this module within the Case Study, especially when compared to other activities of similar type in the Czech Republic. The above mentioned rewards support that. Because on the one hand the given module is aimed at public administration employees and a local self-government and on the other hand at representatives of a business sphere, it is appropriate to acquaint them with a practical application of today's regional policy "tool" (restructuring) among cities and towns in the region, which is, besides SME support, preparation of industrial zones.

6. Navigation for Training

*Recommended target groups for the training (specifically for particular training group)

The module "Regional development, Structural policy and Models of the re-conversion process" was elaborated as a theoretical and methodological starting point for other modules within Work package 6 and the given knowledge could be applied on the conditions of restructuring Moravian-Silesian region in the context of the Czech Republic integration to EU. The module goals unfold from this thought and they should be taken into consideration in the education process itself, its methods and forms. The following points sum up the goals:

• To define theoretical starting points for regional policy, including familiarising listeners with basic regional development theories and their application into practice.

• To define the development of a region and specify methods of its evaluation.

• To familiarise listeners with applied regional policy in the Czech Republic and EU.

• To identify basic types of EU assistance for member countries (and respective regions) in the region development field, including definition of their institutional support and realization procedures.

• To apply EU regional policy and its tools on the conditions of the Czech Republic and Moravian-Silesian region.
To specify the task and importance of municipalities within regional policy, including application on the conditions of Moravian-Silesian region.

It is obvious the theme is quite wide. During training it is often necessary to go deep into it depending on a target group the course is prepared for. The following groups can be put among the target groups:

- Municipality representatives
- Non-governmental representatives and non-profit organisation representatives (NGO)
- Public institutions representatives
- Teachers
- Students

(The module is particularly determined for development agencies, town and municipality associations, Euro-regions, labour bureaus)

*Recommended duration of the training (specifically for particular training group)*

See the Course Guide.

*Recommended Training Forms and Methods (specifically for group training and individual training)*

**Public administration employees:**

In regard to the purpose, this target group is going to use their knowledge from this field, lecturers are recommended to stress the content of the second to the third chapter of the handbook and just marginally as a starting point touch the theoretical approaches on regional policy (it is necessary to clarify the basic terms, which employees might encounter in a regional field. As crucial we can consider informing these employees about possibilities of municipalities on how to pursue effective measures within regional policy and their possibility to use EU tools for that purpose, including illustrative practical examples (see the above mentioned Best Practice and the Case Study).

**Regional institutions employees:**

In regard to the fact, that these institutions are often specialized and their activity is based on creation of programmes and regional development projects, it is necessary to familiarize these employees with as wide problems area as possible. It is necessary to put the same stress on all aspects of regional policy, whether in its theoretical aspect (which is an important starting point for the right implementation of regional policy tools) or in its practical aspect. This category should master completely the content of this handbook, including application on concrete conditions within the enclosed case study.
Employment bureaus:
Because it is a very narrowly focused group of employees, who try to solve the consequences of transformation or restructuring of economy - unemployment, it is necessary to adapt a course content to their needs. It means it is necessary to focus on familiarizing these employees with tools, which can help to solve regional disparity and thus unemployment (Handbook, Chapter 1). As the next crucial field for this category we can consider the chapters devoted to possibilities of using financial means within EU structural policy and concrete programmes and projects, which are carried out in our region.

Potential entrepreneurs and employees in the area of regional development:
The same arguments are valid as for regional institutions employees.

Students:
As far as students, this category should get as wide general knowledge in the field as possible; nevertheless it should be in general level only as students do not have shaped job orientation yet. They can use their general knowledge in as a wide job sphere as possible. A lecturer might be recommended to respect the scope of the given handbook and divert from some detail matters as for example specifications of concrete projects types carried out within pre-accession assistance in Moravian-Silesian region, which are mentioned in the 4th chapter.

Teachers:
It is presumed this target group has sufficient starting theoretical knowledge in this field, it is appropriate to lay stress on practical matters and devote time especially to the application of theoretical knowledge to practice. Elaboration of a set of questions within a case study seems suitable for this purpose.

How to lead training in groups?
As it has been mentioned before, it is necessary to reflect a group structure and its interests. It is appropriate to realize beforehand, what problems are in the centre of participants' attention and adapt training to that. Whatever target group we are dealing with, it is necessary to introduce the group into a theme and begin with a presentation. The subsequent discussion within a group can be based on the presentation of the given theme. The questions given at the end of each thematic unit in the handbook serve as verification of comprehension of the explained and discussed problems. Next it is necessary to apply the acquired theoretical knowledge in practice as much as possible (for example possibility to use respective tools to solve regional disparity, possibility for Moravian-Silesian region to participate on assistance from EU structural funds etc.) For that purpose there are recommended Best Practices, which describe realization of some of regional policy tools in Germany (Porúří region) and in Poland. Especially practical experience of the town of Marklowice in Poland might be appropriate for comparison of experience of the city of Karviná. It is summarized in the Case Study, which is enclosed. On the basis of the comparison, the participants can be lead to look for new possibilities of the use of methods and tools and thus models of
restructuring of regions affected by mining. The given Case Study is supplemented by a number of theoretical and practical (application) questions and tasks, which should be solved in groups within practical exercise.

**How to approach individual preparation?**

Because of the wide problems the participants have to master, it is necessary to motivate them to active individual preparation. The preparation should lie in elaboration of tasks and questions, which were not worked out in the course itself and in study of materials (for example the Strategic vision of regional development of the Czech Republic until 2010 or the National development plan of the Czech Republic for 2004-2006 time period), which are going to be used when analysing the given problems within a course. A seminar paper assignment on a participant's chosen practical theme seems appropriate as well with respect to the participant's professional focus, where in the course acquired knowledge would be used. It is possible to prepare a test for each theme and participants would fill in the test within an individual preparation. In the last session the correctness of the test would be checked. This would offer the participants a feedback regarding acquired knowledge and skills within a given module.

*Recommended sources / references*

[www.karvina.org](http://www.karvina.org)


An act on united Europe. The Institute for international relationship, Prague 1993.

Treaty of Amsterdam.


Web pages of Ministry of Foreign Affairs of the Czech Republic, Ministry for Local Development, Ministry of Labour and Social affairs of the Czech Republic.

http://europa.eu.int/eurostat/

*Evaluation Criteria* *(criteria used to evaluation of the case study)*

The first important item of evaluation participant's successfulness of his/her command of a given theme is the already mentioned lecturer's feedback within discussions lead in groups and within application parts of a course (for example solution of tasks included in the Case Study). Next it is possible to assign a seminar paper within self-study, which the author would defend and the group would have the possibility to formulate their opinions. The last, but in my opinion the least suitable form of verification is a written test containing the questions, which would be linked to a module content.
2.7 Handbook

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Introduction

The Czech Republic is a country with market economy and it belongs among highly developed countries in the central and east Europe. In 2004 it will successfully crown its effort to become a valid member of EU. The EU membership brings lots of challenges and opportunities for our country. On one hand it is a united home market with a range of opportunities for competitive companies, on the other it brings further deepening of regional differences, accompanying ongoing transformation of economy in the last decade. The fact, that economic life is concentrated into noticeably restricted number of areas, cities or regions is valid all over the world. Economic growth has a location tendency. Due to that the importance of regional policy growths as it tries to even up the differences, which resulted from impact of market forces.

A proper understanding of the reasons of interregional differences is an important starting point when drafting adequate measures for their elimination. Theoretical concepts of regional development, that the basic strategies and tools of regional policy are based on, deal with reasoning of these differences including their possible solutions. It is evident, that the creators of regional policy cannot be without the above mentioned knowledge when making decisions.

Regional development concepts developed in the course of years depending on changing conditions of the world economy development and on problems, which these changes have brought. A suitable practical example, which can demonstrate the development, is formation of the regional policy approach in EU. In 2004 the Czech Republic is going to become a member of this integrating assembly, so it actively joins the regional policy applied within European Union. From this viewpoint it is necessary for people involved in the implementation of regional policy measures to have the knowledge on this policy, including its tools, ways of assistance, procedures of realization and institutional support.

One of the principles, EU regional policy functioning is based on, is a subsidiarity principle, so respective municipalities and especially regions themselves play an important role within this policy. A review of tasks, possibilities and duties of representative bodies of regional autonomous units in a regional policy is necessary.

The module and the text are dedicated to these problems. The text is divided into five chapters, which deal with regional economic and policy problems, analysis of the regional policy carried out in the Czech Republic and its comparison to the regional policy carried out in EU. In regard to the already mentioned EU entry of the Czech Republic, the next part of the text is dedicated to the preparation of the Czech Republic to accept assistance from EU structural and pre-structural funds. At the end the possibilities of participation on the assistance from EU sources of Moravian-Silesian region are assessed, its importance for restructuring of the given region and with a help of the Case Study there is a possibility of municipalities drafted regarding their help to eliminate negative impacts of restructuring in progress.
1. Regional economy and policy

1.1 Essential terms

Region is a determined territory with the defined aspects, in which there is a specific functional and related infrastructure and a common interest is put through as to the development of the region and improvement of the citizens’ welfare. Within the region, the territorial units with significant mutual features are connected. These common characteristics may proceed from two trends, from which other criteria for the delimitation of the regions follow, namely:

- **Homogeneity criterion**, according to which such territorial units are united into the homogeneous regions, which are similar as to the specific indicators (unemployment rate, income levels, economy structure, etc.)
- **Functionality criterion**, which regards the integration basis of the specific territories in their close functional interconnection and mutual dependence. Traffic, energetic, communication, social, institutional or educational criteria are used for the delimitation of the functional regions.

Regional development is presented by a complex of processes, which take place within the region and contribute principally to the positive changes in the social economic situation of the region. However, there is another aspect of development and that is the economic growth. In no case one can consider equal the concept of development and growth. The development is by far a broader term and it covers furthermore the growth and other aspects (such as unemployment rate, social justice, basic needs satisfaction, independence, etc.)

Economic growth is understood in the regional concept as a product growth in the region in the course of the specific period. It is measured as a growth of gross domestic product (GDP).

Main determinants of the region development:

- “Active” entrepreneurs, who have found new economic activities,
- “Passive” entrepreneurs, who participate in carrying out the activities of “active” entrepreneurs,
- Physical and social infrastructure, which support the two above mentioned groups of entrepreneurs and provides them with the means of production (job, land, capital).

Main indicators of the regional development and regional differences:

- **Economic indicators** (e.g. gross domestic product and its value calculated anew per one citizen, productivity of labour, structure of economy, patent applications per 1 million of citizens, etc.),
- **Indicators of the labour market** (e.g. unemployment rate, unemployment according to sex, age or educational categories, employment etc.),
- **Indicators of the demographic development** (e.g. number of citizens, population density, population according to age, sex, education in % etc.).
• **Indicators of the environment quality** (e.g. air pollution, water pollution, water waste quantity, etc.),

• **Educational indicators** (e.g. numbers of university students, secondary school students, etc.)

• **Infrastructural indicators** (e.g. length of roads, motorways, railways, number of phone connections, etc.),

• **Social indicators** (e.g. number of inhabitants living below the subsistence minimum, number of the health handicapped, number of inhabitants falling to one doctor, etc.)

### 1.2 Theoretical concepts clarifying the regional development

What is fundamental for the concept of the adequate regional policy and for the preparing of the local and regional strategies is the knowledge of the current theories of the regional development. These theories present more or less a compact validation system of the basic factors, subjects and mechanisms of the regional development. Their set is not only relatively numerous but also conceptually hybrid, so that the initial principles of these theories are often contradictory.

### Main developmental stages of the regional policy

<table>
<thead>
<tr>
<th>General approach</th>
<th>Prevailing theories of the regional development</th>
<th>Regional policy</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Neoclassic approach (1920-1940)</strong></td>
<td>Regional balance theory (mainly the so called neoclassic models)</td>
<td>Basic idea – “workers for work”, main instruments – instruments increasing the mobility of the workforce</td>
</tr>
<tr>
<td><strong>Keynesian approach (1950-1975)</strong></td>
<td>Regional unbalance theory (e.g. cumulative cause theory, growth field theory)</td>
<td>“work for workers”, instruments supporting the investment inflows from the private and public sector into the problematic regions (investment subsidiaries, relocation of institutions)</td>
</tr>
<tr>
<td><strong>Neo-Marxist approach (1970-1985)</strong></td>
<td>Regional balance theory (e.g. theory of the special division of labours)</td>
<td>Proposals for the measures were not formed by the Neo-Marxists (in the socialist countries, the regional policy was very effective but at the expense of the loss of external competitiveness)</td>
</tr>
<tr>
<td><strong>Neoconservative approach (1975 - )</strong></td>
<td>Regional unbalance theory of the (e.g. <em>path dependence</em>, new growth theory)</td>
<td>“support of the local initiative”, the support of SMEs and medium companies, the decentralization of competencies, deregulation measures,</td>
</tr>
<tr>
<td><strong>Neo-institutional approach (1980 - )</strong></td>
<td>Regional unbalance theory (theory of the industrial district, theory of the learning regions)</td>
<td>“cooperation and innovation”, the support of SMEs, the spreading of innovations, networking, the gradualist change of the local institutions based on the study</td>
</tr>
</tbody>
</table>
### Brief overview of the essential concepts of the regional development

<table>
<thead>
<tr>
<th>Author / authors</th>
<th>Name of the theory</th>
<th>Essence of the theory</th>
<th>Essential tendencies of the regional development</th>
<th>Cause of the inter-regional differences</th>
<th>Main mechanisms implicating convergence/divergence</th>
<th>Main subjects</th>
<th>Implications for the regional policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>G.H. Borts, J.L. Stein (1964)</td>
<td>Neoclassic mono- and dual sector models of growth</td>
<td>Growth depends in the long term on the capital quantity and workforce and technical progress, in the short term, then the rate of growth depends on the distance from the balance condition</td>
<td>Convergence</td>
<td>Different facilities of the regions as to the production factors</td>
<td>Decreasing capital and work revenues, workforce and capital mobility, congestion and high costs in the central regions</td>
<td>Rationall'y acting individuals (homo economicus and capital)</td>
<td>Automatic tendency towards equalizing the regional differences, the RP is only to strengthen the balancing mechanisms, e.g. to increase the workforce mobility</td>
</tr>
<tr>
<td>F. Perroux (1950), J. Boudeville (1966)</td>
<td>Field growth theory/the theory of the growth centres and growth axes</td>
<td>Some branches are increasing more rapidly and are more significant than others</td>
<td>Divergence</td>
<td>Differences in the economic structure</td>
<td>Inter-branch relations, reg. Multiplier, internal and external agglomeration savings</td>
<td>Companies</td>
<td>To achieve the growth by implanting the driving branches</td>
</tr>
<tr>
<td>N. Smith (1984)</td>
<td>Unbalanced development theory (see-saw)</td>
<td>Unbalanced development is brought about by uneven social relations</td>
<td>Divergence</td>
<td>Division of labour in the society, the division of capital among particular accumulatio methods, e.g. among production and production tools and consumer goods</td>
<td>Different mechanisms in various regulations, at the level of towns one deals with a ground rent, at the level of countries it is a division of labour, at the global level we are dealing here with different methods of the determining of the work value; other different mechanisms: the centralisation and concentration of capital, differences in salaries and qualification financial capital may work convergently and divergently; tendencies towards equalizing the conditions of production and capital circulation prevail at the global level</td>
<td>Capital</td>
<td>Proletarian movement</td>
</tr>
<tr>
<td>P. Romer (1986), S. Rebelo (1991)</td>
<td>(new) theory of the endogenic growth</td>
<td>Cobb-Douglas’ production function is modified to increasing revenues from the volume and expanded e.g. by a human capital indicator, pieces</td>
<td>Convergence</td>
<td>Differences in the facilities of the regions as to the human sources (including quality and social)</td>
<td>Increasing revenues from capital (including human capital, or knowledge accumulation), external savings (mainly in the area of knowledge spreading), and on the contrary, decreasing revenues from</td>
<td>Private entities, government</td>
<td>State interventions affect the fact, which of the possible balance conditions will be achieved</td>
</tr>
</tbody>
</table>
of knowledge are considered as a fundamental type of capital interactions) and technologies investments into new pieces of knowledge. Transfer of knowledge and technological progress.

<table>
<thead>
<tr>
<th>P. Krugman (1991), M. Porter (1990)</th>
<th>New trade theory</th>
<th>Economic development is a development from randomness to system (=natural tendency of economy towards self-organisation)</th>
<th>Divergence</th>
<th>Chance, natural advantage</th>
<th>Increasing revenues from the volume, imperfect competition, advantageous position, external savings, agglomeration advantages (labour market sharing, technology spreading, extensive supply and demand market), decreasing transport costs, meaning of the positive expectations</th>
<th>Companies, people</th>
<th>Regional policy is to support the specialization, increase in the status (upgrading) and interregional trade; the decentralization of the economic policy; the existing protection of the developing economies allowing the savings achievement from the volume and external savings</th>
</tr>
</thead>
<tbody>
<tr>
<td>B.A. Lundvall (1992), M.P. Feldman, R. Florida (1994), A. Saxenian (1991)</td>
<td>Theory of the learning regions</td>
<td>Competitiveness is based on a better competence to further educate</td>
<td>Divergence</td>
<td>Socio-cultural and institutional differences</td>
<td>Existence of the positive feedbacks in the area of education, the reception of new technologies and procedures; market and extra-market information exchange; existence of the technological infrastructure</td>
<td>Companies, institutios, regional innovative systems</td>
<td>Support of the innovative systems (relation development e.g. between schools, self-government and companies)</td>
</tr>
</tbody>
</table>

### 1.3 Regional policy, its instruments and essential strategies

The main goal of the regional policy is the support of the regional development. What is meant by the **regional policy** is the influencing of the economic processes in particular territorial units (regions) of the country, possibly in the larger territorial unit by means of the public sector.

**Motives** for realizing the regional policy:

- **Economic motive** – interest in the effective use of all production factors, the securing of the economic growth, an optimal company allocation in the given region or solving of the regional unbalance.
- **Social motive** – securing of the growth of the standard of living, what represents the elimination of differences in the income division, the solving of the unemployment problems or achieving the general welfare.
- **Ecologic motive** – securing of the permanently sustainable development, balance in environmental strain.
**Instruments** of the regional policy can be divided according to two viewpoints:

**Objective point of view:**

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Implementation of the instruments</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Information and consulting</strong></td>
<td><strong>Financial motivation</strong></td>
</tr>
<tr>
<td><strong>COMPANIES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobility</td>
<td>Information on the locality, regional marketing</td>
<td>Localization support</td>
</tr>
<tr>
<td>Investments</td>
<td></td>
<td>Investment motivation</td>
</tr>
<tr>
<td>New jobs</td>
<td></td>
<td>Bonuses for the job vacancy</td>
</tr>
<tr>
<td>Technologies, innovations</td>
<td>Technological and innovative consulting</td>
<td>Support of the new technologies and research-developmental innovations</td>
</tr>
<tr>
<td>Founding of the new companies</td>
<td>Entrepreneurial consulting</td>
<td>Risk capital, “starting” assistance</td>
</tr>
<tr>
<td>Cooperation</td>
<td>Cooperation consulting</td>
<td>Cooperation motivation</td>
</tr>
</tbody>
</table>

| **POPULATION** | | | | |
| Education | Information on the education possibilities | Education contributions | Construction of the infrastructure oriented on the population, flats, education, social and cultural facilities | |
| Mobility | Information on the job offers | Mobility contributions | | |
| Supply | Information on the housing offer and supply quality | Subsidies for the close suppliers | | |

| **MUNICIPALITIES – INSTITUTIONS** | | | | |
| Municipality consulting and regional agencies | Contributions to communal and developmental programmes | Assistance to the municipalities in the area of the infrastructure construction | Coordination of the municipalities and regional facilities | |
Economic viewpoint:

- **Macroeconomic instruments of the regional policy** – fiscal policy, monetary policy and protectionism.
- **Microeconomic instruments of the regional policy** – reallocation of the workforce (e.g. costs cover for accommodation, moving or repurchase of real estate) and capital (e.g. investment incentives).

In the interest of the effective and efficient regional policy it is necessary to orientate certain instruments on the specific goals, so that these are consistently brought in accord. Those combinations of the instruments are determined as **strategies**, which focus on the fulfilling of certain aims. Among fundamental strategies can be ranked:

- **Exogenous strategies or those aimed at mobility** – this strategy is oriented on the external development impulses, which are represented by the state’s interventions with respect to the mobility support of productions factors from the developed regions into the problematic regions.
- **Endogenic strategy** – is based on the mobilising of the internal regional factors and creating of the conditions for the development of the regional potential sources.

Control questions:

1. Define a REGION and a REGIONAL POLICY.
2. What is the difference between a region development and economic growth?
4. What theoretical concept explaining region development can be considered as the most up-to-date today and why?
5. State main tools and strategies of a regional policy.

2. **Practical regional policy in the Czech Republic and European Union**

2.1 **Regional policy in the Czech Republic**

The regional policy in the Czech Republic was formed and realized in two distinctly different periods: until the year 1990, in the environment of the centrally planned socialist economy and following that year, in the situation of the transformation process of the economy and society.

2.1.1 **Brief characteristics of the regional policy in the period up to the year 1990**

The policy in the given period can be principally characterized by means of the following points:
• Regional differences were directive with respect to the mobility by the oriented strategy, i.e. the development of the regions falling behind was solved by localizing and placing the enterprises in the given area and by the redistribution of the financial sources.

• The task of the particular enterprises was considerably passive, without any substantial impact on the strategic and short-term decision making.

• Similarly, the task of the regional bodies of the public administration (regional and district national committees) focused somewhat on the objectives of the economy managed by them, whereas the targets of the regional development were part of the political lobbyism in the direction of the central decision making.

• Economic principles of the localization were intertwined by the non-economic ones (e.g. placing from the military-strategic point of view, settling the social and cultural differences etc.) so a unified strategy or theoretical concept is hard to find.

• Administrative measures were univocally preferred with respect to the instruments of the regional policy (regulation by means of the plan with the passive price, currency and finance position); moreover, particular instruments of the regional policy were subjected to these, along with the recipients of this policy.

2.1.2 Brief characteristics of the regional policy in the period after the year 1990

In the first half of the nineties, the regional policy did not play a significant role in the Czech Republic compared to the most of the countries of the European Union. Reasons for this fact can be seen both in the fact that the then governments paid the main attention to the solution of the transformation problems on the level of the entire country and also the interregional economic and social differences were minimal in the Czech Republic at the beginning of the economy transformation.

Since the year 1990, the development in the particular regions has been manifested by the different dynamics due to the economy transformation and in dependence on the starting conditions. Regional differences have been influenced above all by the following factors since that year:

• The considerable decrease in heavy industry.
• The reduction of the number of employees in agriculture.
• The slump of production of the former key enterprises in the region.
• The uneven development of the entrepreneurial activities within the Czech Republic.
• The low interregional mobility of the workforce.

On the basis of the effect of these factors, several fundamental types of the areas have been formed, which are in the centre of attention of the regional policy:
The concept of the regional policy in the Czech Republic was not in accord with the principles of the regional policy realized in the European Union up to the year 1998. Yet, the European Commission observed in June 1997 that “the Czech Republic did not have any regional policy” in its stance as to the Czech Republic’s EU acceptance.

In response to the harsh critic, the Czech Republic adopted a resolution N. 235 from April 8th, 1998 regarding the new principles of the regional policy. In these principles, a broader conception of the regional policy was adopted, primarily with reference to:

- The definition of the essential goal and initial principles of the regional policy,
- The focusing of the support of the regional policy on a broader spectrum of measures, not only on the support of entrepreneurship,
- The task of programming in the regional policy,
- The connection of the regional level of the public administration into the implementation of the regional policy,
- The coordinating role and administration of the financial sources on the level of the Ministry for the Local Development.

The objectives of the regional policy:

- To contribute to the harmonic and balanced development of the particular regions,
- To lower the differences between the levels of the development of the particular regions,
- To support the economic and social development of the particular regions.

Subjects of the regional policy:

- Legislative components of the state House of Commons and Senate
- Executive components of the state (the Government, central administrative bodies)
- Self-government bodies (regional authorities, local authorities)
- Advisory and coordination bodies (National Programming and Monitoring Committee, Councils for the Coordination of the Regional Development, Regional Managing and Monitoring Committees)
- Development agencies with the nationwide or regional activity (e.g. Agency for the Development of Entrepreneurship, CzechTrade, CzechInvest)
- Economic and agrarian chambers, interest associations, employees’ and employers’ organizations
- Institutions of the public sector
- Subjects of the private sector

Programme securing of the regional development:

1. **Strategic and programme documents on the state’s level:**
   - Long-term concepts of the regional policy
   - Strategic programme of the social and economic development of the Czech Republic
   - Strategies of the regional development of the Czech Republic
   - State programme of the regional development
   - Sectoral development programme

2. **Strategic programme documents on the region’s level:**
   - Strategy of the development of the region
   - Development programme of the territorial district

3. **Programme documents of the European Union for making use of the structural funds:**
   - Regional Development Plan
   - Single Programme Document
   - Community Support Framework
   - Sectoral Operation Programme
   - Regional Operation Programme

2.2 Regional policy in the European Union

The regional policy is one of the most significant policies within the communitarian policies of the European Union. It is a substantial instrument by means of which the Community strives to solve the regional disparities and unbalances.

2.2.1 Formation of the regional policy

As early as the European Economic Community was created, the associate countries realized that the differences on the economic and social level of the particular countries were objectionable. Until the year 1973, the individual approach is typical of the regional policy, without any coordination on the national level. There was a concept claiming that the realization of the common market would balance the regional differences within the Community and subsequently the attention was paid to the macroeconomic problems. Another factor, which led to this approach in the area of the regional policy, was the fact that among the original six founding countries there were not noticeable differences; to a certain extent, there was an internal regional disparity, chiefly in France and Italy, where the regional policy had been pursued in the long run.
The regional policy, if one can refer to it, occurred then in the considerable limited form, at the time when the European Investment Bank granted more favourable loans for weaker regions and the common agricultural policy had some structural or regional impacts. In the year 1973, the European Community is enlarged by another three countries, Great Britain, Denmark and Ireland. In consequence of this fact, there was an accentuation of the differences not only among Member States but also among particular regions.

In the 70’s and 80’s, due to the world crisis and petroleum shock, there was a deepening of the interregional differences, along with the slackening of the global economic dynamics. In these circumstances, Great Britain began to push forward the introduction of the common regional policy. In the year 1975, the European Regional Development Fund (ERDF) is established, what can be considered as the beginning of the systematic regional policy. The ERDF became the fundamental internal institution of the European Community for the administrating of the regional policy and an instrument for the lowering of the considerable regional differences in the EC. Assistance from the budget was basically allocated on the basis of the projects, which the Member States put automatically forward to the European Commission.

In the year 1986, the definition of the regional policy occurs in the Single European Act, which is first integrated into the primary Community law and has the following wording: “The Community develops and carries out activities leading towards the support of the entire harmonic development and strengthening of its economic and social cohesiveness. The Community aims mainly at reducing the imbalances among various regions and concentrates on the underdeveloped regions, which are provided the smallest support.”

Although the new concept of the regional policy applied in the Union has recorded a series of positive results lying mainly in the reduction of the regional differences, the necessity for the search of more efficient methods of the realization of the integration targets occurred in this area in connection with the entry of Spain and Portugal (1986), which became the great acceptors of the assistance. In particular, a low level of coordination of the regional policy along with the agricultural and social policy in the financial and conceptual scope was criticised. For that reason, in the year 1988, the Community bodies decided upon the integration of the regional policy and partly social and agricultural policy into the structural policy. Together with the increase in the volume of financial means determined for pursuing this policy, some concerns appeared as to the introduction of the common internal market, which could bring about the growth of the regional inequalities provided that the efficient measures would not be taken for the benefit of the specific regions.

Within the reform of the structural funds, the Community defined in total five goals of the structural policy for the period of 1989-1993, i.e. regional measures:

**Goal 1) Support of the development and structural changes of the underdeveloped regions.**

**Goal 2) Change of the regions or their parts, which are seriously endangered by the economic decline.**

**Goal 3) Struggle with the long-term unemployment and support of the integration of young people and people eliminated from the labour market into the labour process.**
Goal 4) Support of the adaptation of employees to the economic changes and production changes.

Goal 5) Support of the development of the rural regions.
   a) By means of the acceleration of the structural changes in agriculture within the reform of the common agricultural policy and support of the modernisation and restructuring of fishery.
   b) By means of enabling the development of the structural changes of the rural regions.

In the year 1995, as a result of the change, the range of the five goals was extended by new ones in connection with the expansion of the European Union. The new approved goal relates to the acceptance of the two northern countries:

Goal 6) Development and structural changes of the regions with the extreme low density of population.

Goals 1, 2, and 5b and 6 have become the subject of the regional policy.

From the structural point of view, the regional policy of the European Union was criticised primarily because of its broad range and blanket supports. It was often the case that there was an overlap of the programmes realized, what led subsequently to the ineffective use of the financial means determined for carrying out the structural policy. In spring 1997, when an extraordinary meeting of the European Council in Berlin was held, the material with the title Agenda 2000 was approved, which deals with the prospects for the EU in the first years of the coming century. Further, the document handles the economic and social cohesion and structural funds, the main reform steps of the EU structural policy are stated in this paper.

The radical change, which was made on the basis of this document, is the reduction of the above six mentioned goals into three goals, that is into two regional programmes and one horizontal programme for the human sources”

Goal 1 – Support of the development and structural changes, which development falls behind

Goal 2 – Support of the economic and social change of the area, which faces the structural problems

Goal 3 – Support of the adaptation and modernisation of the educational systems, schooling, employment and further measures for the support of the development of the human sources

2.2.2 Principles of the structural policy

The structural policy and principally the use of the particular structural funds, proceed from several fundamental principles, which were introduced by the reform from the year 1988:

1. Concentration principle, which presupposes the concentration of efforts into areas, where the highest evaluation is expected.
2. *Additional principle (complementary)*, which provides for the financing from the structural funds of the Community so that it is not used as a substitution of the national structural subsidies.

3. *Partnership principle*, of which application plays a decisive role in the selection of the projects. The given principle presupposes a close cooperation both among the European Commission and respective bodies on the national, regional and local level specified by each Member State but also among subjects, which participate in making use of the financial means, namely at all stages of the preparation and realization of the support programmes.

4. *Programming principle*, which emphasizes the complex approach towards solving the problematic regions. The means of the funds are allocated on the basis of the perennial and multi-branch programmes put forward by the government of the Member State to the European Commission, and not by reason of particular projects.

5. *Monitoring and devaluation principle* comprises the ongoing monitoring and evaluation of the measures taken and the overall efficiency of the financial means spent.

6. *Subsidiarity principle*, reflecting the fact that responsibility is maximally delegated to the level of the specific reality, where the local conditions can be considered best while realizing the given project.

### 2.2.3 Instruments of the structural policy

Following the reaching of the set goals in the area of the regional development, the Member States of the Union or their regional and local bodies make use of a series of instruments, which the structural policy has at its disposal. The structural funds play a substantial role on the Union level, along with the Cohesion fund and the European Investment Bank.

**Structural funds** contribute positively to the reduction of the regional differences and improvement of the environment. As early as in the year 1960, the *European Social Fund* was set up with the aim of contributing to the requalification of the workforce in the affected areas facing the unemployment problem of young people. In the year 1962, with reference to the introduction and financing of the common agricultural policy, the *Agricultural Regulatory and Guarantee Fund* was established. The *European Fund of the Regional Development* was established in the year 1975 and provides the broadest range of the financial means for the structural policy (approximately 51% of the total expenditures for this policy). Reasons for this fact can be seen in its broad orientation on the strengthening of the economic potential in the subsidized regions, the support of the far-reaching structural changes and the extensive sector of assistance in supporting the economic growth and employment. It is possible to finance the cross-border cooperation and experience exchange among Member States. Further, at this point, we can include the *Financial Instrument for the Fishery Support*, which assists in the restructuring of the seaside areas affected by the fishery decline. Following the signing of the Maastricht Treaty, another reform of the Structural Funds took place (1993), namely in the area of the establishment of the Cohesion Fund.
2.2.4 Forms of assistance from the structural funds, their realization and institutional securing

The financial means from the structural funds allocated to the realization of the set goals are granted to the acceptors in the three forms:

- The first form of assistance is the assistance, which is conditioned by the initiative of the Member States (the so-called national initiative). This form of assistance is drafted on the basis of the Regional Development Plans (RDP) submitted by the Member States for the competent regions. In the period of 1994-1999, approximately 90% of the structural fund means flowed into the national initiative, for the years 2000 and 2006, this share was increased up to 94%. In this case, several principles are valid for the granting of the financial means from the structural funds:
  1. The submitted projects have to be accompanied by the broader developmental programme (RDP), which is to prove the target effects of the given project and at the same time to prevent from the unnecessary and inefficient division of the financial means.
  2. The Government or any other body of the given state has to participate in the financing of the project, securing thus the economy of the project. The regulations stipulate the minimal and maximal shares of assistance from the structural funds. For the regions, which are classified into Goal 1, the financial means mustn’t exceed 75% of the total costs and must amount to no less than 50% of the public expenditures for the measures. Within the regulation it is specified that in exceptional and well-founded cases, the contribution from the structural funds to the regions classified into Goal 1 in the four countries included into the Cohesion Fund (Greece, Ireland, Portugal, and Spain) may reach maximum of 80% of the total sum for the peripheral regions as well as for the Greek islands, which are disadvantaged by their location. For the other priorities, the upper limit is of up to 50% of the total costs with the minimum of 25% of the public expenditures for the measures.
  3. The selection of the projects is executed by the Commission by means of their bodies and financial means are allocated explicitly to the particular projects.

- Assistance dependent on the independent programmes of the European Union (Community’s Initiative), which is granted by the EU Commission for measures of the special Community’s interest. These initiatives shared 9% of the total amount of the structural funds in the periods of 1994-1999. There were 13 Community’s Initiatives at that period of time. For the years 2000-2006, the number of initiatives is reduced to 4 and their total share in the structural funds was lowered from the above mentioned figure of 9% to 5%. At present, there are following Initiatives existent:
  1. Interreg II: cross-border cooperation (part A) and networks of energy (part B), cooperation in the area of the regional planning, chiefly water management (part C) – will be financed from the ERDF,
2. **Urban**: regeneration of the crisis zones in the middle and large sized towns with the aim of supporting the incessant development of towns – will be financed from the ERDF,

3. **Leader +**: support of the local initiatives for the development of the countryside,

4. **Equal**: international cooperation in support of the fight against all forms of discrimination and inequality on the labour market – will be financed from the ESF.

The initiatives for the given period, as well as the regulations for the submission of the proposals and their realization, are accepted by the Commission following the consultations with the European Parliament, the Economic and Social Committee, the Region Committee and Managing Committee of the Communities’ Initiatives.

- **Innovative measures** (1% of the total amount) are bound to the Community’s Initiative. These focus mainly on the verification of new forms of the regional policy. In this case, the structural funds finance the studies, technical assistance measures and pilot projects. Pilot projects or sample projects can be submitted by the Member States, regional or local bodies, or private persons. They have to deal with the topics, which are submitted by the Commission.

The European Union applies the so called **realization procedures** in granting and making use of the assistance from the structural funds. These procedures determine the conditions, which the subjects, applying for assistance, have to respect and accomplish. Principally, we are dealing here with the compatibility of the projects financed from the SF with the Community’s policy. Further, attention is paid to the assistance which is to be allocated into areas, where the proposal shows a middle term economic and social benefit, proportional to the means invested. Particular regulations stipulate maximum and minimal assistance shares from the structural funds and define the procedure of the subsidy payment. The legislative of the structural funds requests the responsible organisations for the realization of measures to carry out the corresponding assistance publicity for the Community with the aim of boosting the consciousness in relation to the Community’s activity. Member States have a commitment to take necessary steps towards verifying the fact whether the financial means provided within the structural funds were correspondingly spent.

**2.2.5 Cohesion fund**

Cohesion Fund was established in the year 1993 in the context of the Maastricht Treaty negotiations and a further deepening of the integration process within the project of the European Economic and Monetary Union. This fund is not officially ranked among the structural funds. It is independent and its role is to contribute to the accelerated development of the least developed Union’s countries so that these are capable of meeting the convergence criteria for the European Monetary Union’s entry.

The Maastricht Treaty stipulates that the financial means from the Cohesion Fund ought to be offered to the “Member States with the inhabitant’s GDP lower than 90% of the Community’s average, and which have a programme leading to the fulfilment of the conditions of the economic convergence”. By means of the Cohesion Fund, more
comprehensive projects of the multinational nature are co-financed, which costs exceed 10 million EUR.
The means from the Cohesion Fund are only intended for the projects of the definite nature:

- Environmental projects contributing to the environmental policy of the Community and primarily to the priorities of the fifth policy programme and projects relating to the environment and continual sustainable development,
- Projects of the common interest in the area of the transport infrastructure, which are part of the priority realization of the trans-European networks set by the community.

The assistance share of the European Union financed from the fund lies between 80-85% of the public or equivalent expenditures of the project. When dealing with the project assistance, which will generate incomes in the future (e.g. infrastructure, for which the user pays or production investments in to the area of the environment), the European Commission lays down the total assistance of the Union in cooperation with the given Member State, together with taking note of the amount of the expected net proceeds in the deduction form. The assistance of the Cohesion Fund for the studies and technical support measures may reach up to 100% of the total costs. This form of costs mustn’t exceed 0.5% of the total fund’s expenditures. With respect to the efficiency of the means spent, special attention is paid to the expense items so that these are not contained both in the Cohesion Fund and at the same in one of the structural funds.

2.2.6 European Investment Bank
The European Investment Bank (EIB) plays a considerable role in the fulfilment of the structural goals. The EIB is a subject, which is endowed with juridical subjectivity, and therefore it is formally independent on the managing bodies of the Community. The European Investment Bank was already set up by the original Rome Treaty as a bank, which is owned by all Member States of the Community.

Its objective is to support financially the projects realizing the priorities of the Community, above all the activity relating to the realization of the structural and regional policy or some industrial policy. Thus, in accord with the Treaty “it is to contribute to the balanced and uninterrupted development of the common market in the Community’s interest”.

2.2.7 Territorial units for the structural and regional policy in the European Union
In the European Union, for reciprocal comparisons, the so called nomenclature of the territorial statistical units or NUTS\(^4\) is applied. The essential meaning has both their determination for the statistical EU needs and also for the purposes of the subdivision of the different level regions into particular objectives of the structural EU policy. NUTS may comprise one or more territorial self-government units within the given state.

The determination of NUTS proceeds from the complementariness principle, in other words, higher units are made up of the precise number of the entire lower units. The

\(^4\) Derived from French Nomenclature des unités territoriales statistique.
individual levels of NUTS are defined on the basis of the size of the territory given by the number of citizens and area. At the present time, there are five levels of NUTS used in the European Union:

1. **NUTS I**, is a territorial unit, which covers large areas (countries, micro-regions) of the given state. It is then the largest regional comparative unit and is usually made up of several units of the NUTS II level.

2. **NUTS II** corresponds to the level of the middle article of the territorial administrative subdivision of the given state. The size of these territorial units ranges with the number of citizens from one to two millions of citizens, the EU average is 1.83 million of citizens, the area of the territory is then on average 23,000km² (with smaller territories, the size of the NUTS II territory ranges from 3-10,000km²).

3. **NUTS III**, which is mostly a unit corresponding to the level of the lowest territorial administrative region of the state administration (level of districts or regions). With smaller EU countries, its size oscillates between 200 up to 400,000 citizens; the EU average is 410,000 citizens. The size of the units with smaller countries ranges then from 1 to 3,000km² (EU average is 5,400km²).

4. **NUTS IV**, represents the level of districts, or micro-regions.

5. **NUTS V**, including the level of districts.

NUTS II and III regions have a direct link to the structural funds, on which basis the regions are determined for the support within the individual objectives.

**Control questions:**

1. Define the main principles of region policy invoked in the Czech Republic before 1990 and after 1990.
2. Define the main goals of EU region and structural policy.
3. What principles EU structural policy stands on?
4. State and characterize EU structural funds.
5. What areas does help from Cohesion fund go to?

**3. Czech Republic and its preparation for making use of the assistance from the structural funds of the European Union**

The regional policy in the EU policy, as it is evident from what has been mentioned above, holds a very distinguishable position and the Czech Republic will have to respect this fact following the integration into the EU structures. The regional policy of the European Union is aimed at the support of the lagging regions (in relation to the EU average) including the structurally affected and rural areas and the fight against unemployment. Within the convergence process of the candidate countries with the EU,
in addition to it, these countries were allowed by the EU to make use not only of the Phare programme but also of the financial means directly from the structural funds or the Cohesion Fund in the form of the ISPA and SAPARD programmes. So that this assistance is realized, along with the standard assistance within the EU structural policy, the Czech Republic has to respect the essential principles and rules of the common policy; for that reason it is necessary to secure the compliance of the system of the regional policy in the Czech Republic with practice in the EU.

3.1 Pre-accession EU programmes and their task in the regional policy of the Czech Republic

Countries applying for the EU entry cannot directly make use of the structural funds and the Cohesion Fund but for their support, for gaining experience with these instruments of the regional and structural policy, the European Commission proposed the pre-accession assistance from the year 2000. The financial means are obtained by the candidate counties by means of the three pre-accession programmes. We are dealing here with PHARE, ISPA and SAPARD programmes. Following the EU entry, this assistance will be replaced by the programmes from the structural funds and projects of the Cohesion Fund.

Pre-accession assistance from the financial instruments PHARE, ISPA and SAPARD

<table>
<thead>
<tr>
<th>Candidate countries in total (yearly, in million EUR)</th>
<th>Czech Republic (Yearly, in million EUR)</th>
<th>Czech Republic (Yearly, in million CZK)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Minimum</td>
<td>Maximum</td>
</tr>
<tr>
<td><strong>PHARE</strong></td>
<td>1 560</td>
<td>37*</td>
</tr>
<tr>
<td><strong>ISPA</strong></td>
<td>1 040</td>
<td>57</td>
</tr>
<tr>
<td><strong>SAPARD</strong></td>
<td>520</td>
<td>22</td>
</tr>
<tr>
<td><strong>In total</strong></td>
<td>3 120</td>
<td>116</td>
</tr>
</tbody>
</table>

* We are dealing here with the amount allocated for the area of industrial and social coherence from the total PHARE allocation amounting to 79 million EUR.

3.1.1 Phare (Poland and Hungary Assistance to the Reconstruction of the Economy)

The Phare Programme is an initiative of the European Union, which offers the financial grants to the countries of Middle and Central Europe. This programme came into existence in the year 1989, when the provision of the non-repayable economic grant to Hungary and Poland was approved. The assistance within this programme was to support the reforms of the political systems in these countries. Phare expanded gradually from the original two countries to another 13 countries: Albany, Bosnia and Herzegovina, Bulgaria, the Czech Republic, Estonia, the former Yugoslavian Republic, Macedonia, Hungary, Lithuania, Latvia, Poland, Slovakia and Slovenia.

Phare was designed as a support programme for the transition of the countries to democracy and market economy, but its role altered with the changes progressing in the supported countries. Since the year 1994, Phare has focused on the support of the ten
countries interested in the EU membership in their preparation for the EU entry. Currently, the main objective of the programme is to facilitate the adjustment of the economies of these countries in the European Union. In partner Phare countries, which have not applied for the EU membership, the programme targets the further support of the economy of the free market and the strengthening of the democratic institutions.

All means from the Phare fund are provided in the grant form, not as a loan. In some cases, the acceptor of the grant can decide that he will make use of the money obtained for lending to enterprises or other organisations. In no case he does not have to return the means from the Phare grants unless he proves that these had been used for the original intended purposes. 75% is regularly reckoned with the EU share.

For the candidate countries, the annual budget of the Phare programme reaches 1.56 milliard EUR for the periods of 2000-2006.

3.1.2 ISPA (Instrument for Structural Policies for Pre-Accession)

The instrument of the financial assistance ISPA is aimed at the support of the investment projects, which contribute to the improvement of the infrastructure, environment and transport networks. Candidate countries are offered the investment assistance in exercising the legislative of the European Community, mainly in the areas of water pollution, air pollution and waste economy. In the case of the transport infrastructure, ISPA will provide the investment support for the construction, reconstruction and interconnection of the national transport networks, of which quality and throughput are inevitable for the economic development of the countries and regions.

Financial aid within ISPA may be granted in the form of the non-repayable subsidy by means of the grant of the repayable subsidy at an advantaged interest rate, the combination of the non-repayable and repayable subsidy, the contribution for the part discounting of the commercial credit. The total amount of the aid requested from the ISPA means can reach maximum 75% (in exceptional cases, up to 83%) of the total costs for the realization of measures.

1040 million EUR was annually allocated from this programme for the period of 2000 up to 2006.

3.1.3 SAPARD (Special Accession Programme for Agriculture and Rural Development)

We are dealing here with an action programme for the pre-accession assistance in the agriculture and rural development. The SAPARD programme assists the candidate countries in solving the specific tasks when implementing the rules and regulations of the European Communities, which refer to the common agricultural policy. It attempts to solve the problems concerning the structural changes in the individual agricultural

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6 E.g. in the area affected by exceptional natural disasters (e.g. inundation).
sectors and in the countryside. The candidate countries may make use of the SAPARD programme in the period from the year 2000 to the year 2006, maximally up to the date of the EU entry.

A noticeable difference from other programmes (e.g. Phare) is the fact that the SAPARD programme clearly defines the intention: to prepare the candidate countries for the structural EU funds. What is important is that the countries will be sufficiently prepared ahead of time and will have all necessary instruments tested for making use of the structural funds.

What is advantageous for the candidate countries is independence and codecision authority, along with each country’s attempt to comply with the EU rules.

Main priority of the Union is:
- To create the new job opportunities in the countryside (besides agriculture),
- To improve the competitiveness,
- To improve the quality and performance of medical standards.

The means from this programme may amount to 75% of the total costs for the specific project or measures. The annual allocation from the SAPARD programme for all ten candidate countries will come to 520 million EUR.

### 3.2 Institutional and programme preparation

#### 3.2.1 Defining of the regions for the purposes of the regional and structural EU policy EU

The regulation of the EC Council stipulates that the support from the Structural funds for the Goals 1 (support of the regions with GDP lower than 75% of the EU average) will be granted to the NUTS 2 territorial units. The regions of the Czech Republic, which were established on the basis of the constitutional Act N.247/1997 Coll. on the date of 1st January 2000, are for this purpose too small. Therefore, the Government of the Czech Republic approved the European classification of the NUTS territorial units as a classification CZ – NUTS by adopting the resolution N.707 from 26th October 1998. According to the classification, the area of the Czech Republic is divided into six NUTS levels with the following determination:

<table>
<thead>
<tr>
<th>NUTS</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>state (Czech Republic)</td>
</tr>
<tr>
<td>1</td>
<td>territory (Czech Republic)</td>
</tr>
<tr>
<td>2</td>
<td>area</td>
</tr>
<tr>
<td>3</td>
<td>region</td>
</tr>
<tr>
<td>4</td>
<td>district</td>
</tr>
<tr>
<td>5</td>
<td>municipality</td>
</tr>
</tbody>
</table>

The NUTS 2 determination appears in CZ – NUTS, which will serve for the statistical and analytical purposes and for fulfilling the functions corresponding to the EU regulations for the assistance realization implemented from the Structural funds. There
are eight territorial units, these, according to the size of the future regions, consist of one or two and exceptionally three regions established in the mentioned year 2000. The size of all these NUTS 2 exceeds 1 million citizens. Only the regions of Prague, Ostrava and Středočesko represent directly NUTS II because of their size. Another NUTS is made of Střední Morava (regions of Olomouc and Zlín), Jihovýchod (regions of Brno and Jihlava), Jihozápad (regions of Plzeň and Budějovice), Severozápad (regions of Karlovarsko and Ústecký) and Severovýchod (regions of Liberecko, Pardubicko and Královehradecko).

Characteristics of NUTS II in the Czech Republic

<table>
<thead>
<tr>
<th>NUTS II</th>
<th>Area in km²</th>
<th>Population on the date of 1.1. 1997</th>
<th>Population density / km²</th>
<th>Regions in total</th>
<th>Districts in total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Praha</td>
<td>496</td>
<td>1 204 953</td>
<td>2 429</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Střední Čechy</td>
<td>11 013</td>
<td>1 105 234</td>
<td>100</td>
<td>12</td>
<td>1 147</td>
</tr>
<tr>
<td>Ostrava</td>
<td>5 555</td>
<td>1 287 413</td>
<td>232</td>
<td>6</td>
<td>297</td>
</tr>
<tr>
<td>Jihozápad</td>
<td>17 618</td>
<td>1 181 005</td>
<td>67</td>
<td>14</td>
<td>1 128</td>
</tr>
<tr>
<td>Jihovýchod</td>
<td>13 992</td>
<td>1 662 657</td>
<td>119</td>
<td>12</td>
<td>1 373</td>
</tr>
<tr>
<td>Severozápad</td>
<td>8 649</td>
<td>1 130 368</td>
<td>131</td>
<td>10</td>
<td>484</td>
</tr>
<tr>
<td>Severovýchod</td>
<td>12 440</td>
<td>1 492 317</td>
<td>120</td>
<td>13</td>
<td>1 115</td>
</tr>
<tr>
<td>Střední Morava</td>
<td>9 105</td>
<td>1 245 190</td>
<td>137</td>
<td>9</td>
<td>689</td>
</tr>
<tr>
<td>Total</td>
<td>78 868</td>
<td>10 309 137</td>
<td>131</td>
<td>77</td>
<td>6 234</td>
</tr>
</tbody>
</table>

Source: Ministry for the Local Development

Subsequently, the Regional Managing and Monitoring Committees (RMMC) were set up as regional representations of NUTS 2, which are responsible for the preparation of the regional developmental documents (Consultatory Documents and Regional Operational Programmes). The bases of these committees are representatives of the former Regional Coordination Groups from the Regions, of which NUTS 2 is made up.

Another type of the regions, which have a direct relation to the structural funds, is NUTS III. The 14 already mentioned regions correspond to this determination in the Czech Republic. NUTS 3 is a basic unit for the monitoring of the regional differences in the regional subdivision of the state and realization of the regional policy of the Czech Republic.

As to other levels of NUTS, as these had been defined by the EU bodies, districts in the Czech Republic can be regarded as NUTS IV (these comply with the Union’s usage in relation to the number of citizens and size). The definition of the municipality in the Czech Republic complies with the Community’s standards, although 30% of municipalities have fewer than 200 citizens with a permanent residence. For making the
comparisons among other countries, and mainly for the EU needs, the selected indicators will be monitored for the NUTS 1 and NUTS 0 levels, which are identical.

3.2.2 Programme documents
As it was already mentioned in chapter two, to the programme documents of the European Union, which relate to the regional and structural policy, belong the following:

- National Regional Development Plan (NRDP),
- Community Support Framework (CSF),
- Single Programme Document (SPD) – for Prague,
- Sectoral Operational Programme (SOP),
- Regional Operational Programmes (ROP) – following the EU entry, for the periods of 2004 – 2008 the so called Common ROP.

In December 2002, the processing of the National Development Plan (NDP) was completed for the years 2004 – 2006 as a fundamental document for making use of the structural assistance, which was submitted to the Government of the Czech Republic for approval.

On 3rd March 2003, the Deputy Ministry for the Local Development handed this plan over to the ambassador of the Czech Republic at the EC. The Czech Republic became the second country among the accessing countries, which had submitted the final version of the NDP and begun thus its negotiating.

On the basis of the submitted NDP, the Commission has to elaborate the so called Community Support Framework, which will confirm the structure of the operational programmes and budget for its financing in the period 2004 and 2006.

The global objective of the NDP is “a sustainable development based on the competitiveness”. Among specific goals of the NDP can be ranked: the creation of conditions for the growth of the economy by strengthening the inner factors, increasing the qualification level, competitiveness, workforce mobility, approaching the Union’s standards in the area of environment along with the sustainable development of the regions.

The global and specific objectives of the NDP will be reached by implementing the five operational programmes (OP). Four operational programmes are sectoral: the OP - Industry and entrepreneurship, the OP - Infrastructure, the OP - Development of Human Sources and the OP - Development of the country and multifunctional agriculture. For seven cohesion regions, which are eligible for the support within the goal 1 of the structural funds, the Common Regional Operational Programme (CROP) is put forward, which was set up by uniting the prepared OP of the individual seven NUTS II regions.

Anyway, the first version of the NDP from the year 2001 contained six sectoral operational programmes and eight regional operational programmes.
Together with the National Development Plan, another two operational programmes out of five operational programmes were submitted in March this year, namely the OP – Development of Human Sources and the OP – Development of the country and multifunctional agriculture. In the middle of April, other operational programmes will be put forward: the OP – Industry and entrepreneurship, the OP – Infrastructure and Common regional operational programme.

As a result of its economic development, the capital Prague is not included among the OP because it does not fulfil the region indicator of the goal 1. The Single Programme Document is elaborated then for Prague.

**Brief characteristics of the individual operational programmes**

The **Common Regional Operational Programme** (CROP) is a comprehensive document comprising the priorities of the seven cohesion regions (i.e. the entire area of the Czech Republic with the exception of the capital Prague), which can be supported from the structural funds of the Union within the goal 1 in the period 2004 – 2006. The global objective of this programme is to achieve the continual economic growth and growth of the quality of the citizens’ life in the region on the basis of encouraging new economic activities with the emphasis on the creation of jobs, the improvement of the infrastructure quality and environment, the general development of the human sources and on the deepening of the social integration.

The CROP will be co-financed from the European Regional Development Fund (ERDF) and partly from the European Social Fund (ESF).

**Operational programme Industry and Entrepreneurship**

Its aim is to support the development of industry and entrepreneurial services and to complete its necessary structural changes. This programme works out the targets and strategy of the industrial policy of the Czech Republic. In the period of 2004 – 2006, it will be co-financed from the ERDF.

**Operational programme Infrastructure**

This programme relates to the strategic goals set in the transport policy of the Czech Republic, in the strategic documents dealt with by the Government of the Czech Republic and it participates in solving the weak points of the branch. The OP – Infrastructure will be also co-financed from the ERDF.

**Operational programme Development of the Human Sources**

The OP – Development of the human sources forms the basis for the support realization from the ESF. The global objective is to reach the high and stable employment rate based on the qualified and flexible workforce, the integration of the social excluded population groups and enterprises’ competitiveness.
Operational programme Development of the Country and Multifunctional Agriculture

This programme is based on the continuous sustainable development and the stabilization of the rural areas. In the period of 2004 – 2006 it will be co-financed from the European Agricultural Guidance and Guarantee Fund. The measures for fish farming and activities carried out by experts will be supported by the Financial Instrument for Fisheries Guidance (FIFG).

3.2.3 Institutional preparation

The Government of the Czech Republic decided on the number of the prepared programme documents on 23\textsuperscript{rd} January 2002 and appointed the managing and payment bodies for making use of the structural funds in the shortened programme period 2004 – 2006.

The Managing Body for the Community Support Framework, which is represented by the Ministry for the Local Development in the Czech Republic, is held responsible for the total effectiveness, the correctness of management and the execution of assistance provided from the structural funds to the Czech Republic. Further, this body is accountable for the communication with the Commission.

In the course of the year 2003 (at the negotiating stage with the CSF), the Managing Committee of the Community Support Framework will be established by the Ministry for the Local Development as an advisory board for the needs of the efficient management and the coordination of the Managing Body of the CSF. The committee members will be the representatives of the CSF body, managing bodies of the individual operational programmes and Payment Body. The managing body will prepare the agenda along with the elaborating of the recommendations for the meeting of the Monitoring Committee of the Community Support Framework.

A similar structure – the managing body and managing committee – will exist for the individual OP. The managing bodies for four operational programmes and the Single Regional Operational Programme are evident from the following table.
Managing bodies for making use of the structural funds in the Czech Republic

<table>
<thead>
<tr>
<th>Single Regional Operational Programme</th>
<th>Ministry for the Local Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>OP Industry and Entrepreneurship</td>
<td>Ministry of Industry and Commerce</td>
</tr>
<tr>
<td>OP Infrastructure</td>
<td>Ministry of the Environment</td>
</tr>
<tr>
<td>OP Development of the Human Sources</td>
<td>Ministry of Labour and Social Care</td>
</tr>
<tr>
<td>OP Development of the country and</td>
<td>Ministry of Agriculture</td>
</tr>
<tr>
<td>agriculture</td>
<td></td>
</tr>
</tbody>
</table>

Source: Ministry fro the Local Development.

The managing bodies of the individual operational programmes can also set up a managing board for providing the effective programme management, which will function as an advisory body.

The representatives of the individual NUTS II regions will participate in the Managing Committee for the management of the SROP. Its members will be then the representatives of the regional committees, the representative of the Centre for the Regional Development at the Ministry for the Local Development, representatives of the Ministry of Finance and the representative of the payment unit.

The performance of some functions may be delegated by the managing body to the intermediary subjects. What is in force in the Czech Republic is that the managing body will be responsible for the management and the total coordination of the programme realization and the intermediary subjects will be then entrusted with the performance of the functions relating to the management and project monitoring. Thus, a more efficient functioning of the management system will be facilitated.

Three months at the latest, following the decision on the provision of the contribution from structural funds, the monitoring committees will be established in the Czech Republic for supervising each of the operational programmes and the Community Support Framework. The members of the Monitoring Committee of the Community Support Framework will be the representatives of the Managing Body of the CSF, the Payment Body and all managing bodies of the operational programmes. The representative of the managing body of the respective operational programme will preside the Monitoring Committee of the Operational Programme. A special case will represent the Monitoring Committee of the Single Regional Operational Programme, in which lead there will be besides the state also the Ministry representative for the Local Development, the Ministry representative and the Centres for the Regional Development of the Czech Republic and also the representative of the European Commission and the European Investment Bank with an advisory vote.

The Ministry of Finance will be the only payment body in the Czech Republic. Although some of its functions and activities will be delegated to the payment unit established at the ministries, which are the managing bodies for individual operational programmes. These, needless to say, have to be functionally independent on the units performing the function of the managing body.
The Czech Republic, as an EU Member State, will be accountable for the securing of the adequate knowledgeableness and assistance publicity from the structural funds, which will be realized by the Managing Body of the Community Support Framework. For this purpose, the Communication action plan will be elaborated and main communicative instruments will be e.g. the preparation of the promotion materials, organizing seminars and conferences or running the central informative internet webpage with the content of the structural fund assistance.

Since the instruments from the funds of the European Union are not granted automatically, but only on the basis of the elaborated projects, it is inevitable for the Czech Republic to create a system of bodies, which could then propose, realize, manage and monitor the worked out projects.

3.2.4 Realization procedures of the assistance from the structural funds

In making use of structural funds, there is a shared responsibility between the Commission and the Member State. The cooperation procedure between these two subjects is the following:
A list of the eligible regions
(Elaborated by the Commission)

A multi-stage system

Regional Development Plan
(RDP)
(Submitted by the member state to the
Commission 4 months at the latest
following the elaboration of the list of
regions)

Community Support
Framework (CSF)
(Elaborated by the Commission up to
5 months after presentation of the
Regional Development Plan)

Operational Programmes (OP)
(Submitted by the member state to the
Commission; for speeding the
procedure up, these can be submitted
already with the RDP)

Single Programme
Document (SPD)
(Submitted by the member state to
the Commission 4 months at the
latest following the elaboration of
the list of the regions)

Decision of the Commission
on the SPD
(The Commission accepts the
decision on the SPD 5 months at the
latest after its presentation)

Programme supplement
(Submitted by the member state up to three
months following the approval of the SPD
or the OP)

A simplified system

Source: Skokan, K: European Regional Policy in the context of the EU entry of the Czech Republic,
Ostrava 2003
Control questions:

1. What pre-accession EU programmes can the Czech Republic use to get financial resources? Describe them briefly.

2. State the main programme documents, which the Czech Republic has accepted as a prerequisite for being able to make use of the assistance from structural funds?

3. What body is held wholly responsible for effectiveness, correctness of management and the making use of assistance provided from the structural funds to the Czech Republic?

4. What Czech body functions as a payment authority for the realization of assistance from EU structural funds?

5. Describe realization procedures of assistance from the structural funds.

4. Moravian-Silesian Region and its participation in the assistance from the sources of the European Union

Moravian-Silesian Region (formerly known as the Region of Ostrava) was appointed on the date of 1st January 2000 within its existent boundaries according to the constitutional Act 347/1997 Coll., when it was established as one of the 14 new regions of the Czech Republic (then as the region of Ostrava). According to the resolution N.707 of the Government of the Czech Republic from 26th October 1998, Ostravsko (Moravskoslezsko at present) was defined as a statistical unit NUTS 3 and concurrently also as a statistical unit NUTS 2.

Essential comprehensive indicators of the Moravian-Silesian Region:

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area</td>
<td>5 554 km²</td>
</tr>
<tr>
<td>Population (on the date of 1. 1. 2002)</td>
<td>1 265 912</td>
</tr>
<tr>
<td>Population density (on the date of 1. 1. 2002)</td>
<td>228 persons/km²</td>
</tr>
<tr>
<td>Number of districts:</td>
<td>6</td>
</tr>
<tr>
<td>Number of municipalities:</td>
<td>302</td>
</tr>
<tr>
<td>Unemployment rate (on the date of 30. 11. 2003)</td>
<td>16,4</td>
</tr>
<tr>
<td>Average gross monthly wage (data for the year 2002)</td>
<td>15 872 CZK</td>
</tr>
</tbody>
</table>
Moravian-Silesian Region is purposefully supported with the aim of the universal development and the achievement of the region’s and individual enterprises’ competitiveness in the domestic and international competition and the accelerated region’s integration into the European space.

The public support of the Moravian-Silesian Region comprises national instruments (departmental allocations), expenditure allocations of the territorial budgets and the financial aid from the programmes of the European Union. The Government of the Czech Republic has already offered entrepreneurship support programmes for many years, which are focused on the SMEs.

The support of the regional development from the EU funds in the Czech Republic was initiated in the year 1991 in the programme drafts of the Reconstruction of enterprises and privatisation. Within the programmes of the European Union, a series of activities is supported along with the problematic areas of the described region, which was selected as a pilot project. We are dealing here e.g. with the PALMIF programme in support of the labour market, the creation of new jobs and requalification. Phare CBC intends to invest into the cross-border cooperation with Poland and Slovakia.

The European Union has spent more than 147 million EUR on the main activities in the Moravian-Silesian Region. The half of these financial means were intended for the
ISPA programme itself, the remaining, to a large extent, fell to the aims of the PHARE programme, only a small amount was used within the SAPARD programme. Hundreds of smaller activities are supported in support of the SMS’ entrepreneurship, information centres and the Entrepreneurial Innovative Centre in Ostrava, further loans and grants in support of entrepreneurship and a number of projects in the area of the restructuring of steel industry.

The European Commission expects the support in the coming years in the Moravian-Silesian Region, both within the pre-accession and structural EU funds too.

4.1 Programmes of the PHARE regional development in the Moravian-Silesian Region

The support of the regional development from the EU funds in the Czech Republic was begun in the year 1991 within the Restructuring of enterprises and privatisation programme. The Moravian-Silesian Region (earlier the region of Ostrava) was selected as a pilot project due to its industrial character (steelworks, coal mines, heavy machinery, and chemistry) and the expected restructuring with enormous impacts in the economic and social area.

4.1.1 Programme Phare CS-9203

In the year 1992, 12 million EUR was earmarked within the financial memorandum for the CS-9203 programme: Privatisation, restructuring, and development of the private sector for the region of Moravia and Silesia. This sum was divided into the formation of two institutions\(^8\) and in support of their projects:

- **Agency for the Regional Development in Ostrava (ARD)** established in the year 993: 2 million EUR. The support is intended for the centres in support of entrepreneurship (Ostrava, Kopřivnice, Krnov), the Research-technological park in Ostrava, the industrial zone of Ostrava-Mošnov, the projects of the municipalities, the development of tourism (cycling tracks and tourist information centres), the development of the information centres and support of the ARD.

- **Regional Entrepreneurial Fund in Ostrava (REF)** established in the year 1994: 10 million EUR. It was the pilot project based on the support of SMEs in the form of the risk capital fund. The REF fund was set up in the year 1994 and capital was invested into 15 companies. The subsidiary company of the REF is the Czech-Moravian Entrepreneurial Fund Ostrava (CMEF), which was established in the year 1999 for investing capital into projects in the region of North-western Bohemia (NUTS II). At present, it invests into two companies.

4.1.2 Programme Phare CZ9503-09-01

For the purpose of solving the inundation consequences in the municipalities in the year 1997, the Small Scale Infrastructure Fund was established. In total, 46 projects were financed in the area of the renewal of the infrastructure. 1.5 million EUR was allocated

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\(^8\) Both institutes realized the first projects from the EU funds in the years 1994-1996.
to the projects by means of the ARD Ostrava. The ARD Ostrava managed this programme.

4.1.3 Programme Phare CZ9603

Programme Phare CZ9603 contains the following four main sub-projects:

- **Development of the Regional Infrastructure** (allocated 660,000 EUR): the SOM industrial zone near the airport Ostrava-Mošnov, the Research-technological park Ostrava, the Logistics study of the region, the Preparation of the implementation of the regional projects.

- **Local Infrastructure** (620,000 EUR): projects in the municipalities, the support of tourism and SMEs.

- **Information and the Public Knowledge** (510,000 EUR): the regional information system, the Euro Info centre, the promotion of the region, education and schooling projects of the municipalities.

- **Regional Development** (210,000 EUR): operation costs and the support of the activity of the ADR Ostrava, the preparation of the Regional Operational Programme (ROP) for making use of the EU funds.

The ADR Ostrava managed this programme. It was finished in the year 2000 and 2 million EUR was allocated within this programme.

4.1.4 Programme Phare CZ9705 and Phare CZ9807

We are dealing here with the programmes for the preparation of making use of the structural EU funds. Within these programmes, 490,000 EUR was allocated in total.

Programme Phare CZ9705 was the first programme for the purposes of the preparation of making use of the structural funds within the pre-accession period. It is realized within the entire territory of the Czech Republic, the CZ9705-01-01-01-03 secretariat for the micro-region of Jeseníky project is intended for the Moravian-Silesian Region (150,000 EUR), which comprises the formation and operation of the secretariat for the verification of the pre-structural funds in the micro-region of Jeseníky. The secretariat was set up at the ADR Ostrava.

Programme Phare CZ9807 is also realized across the entire area of the Czech Republic. The CZ9807-01-01 Investment Support for the Jeseníky pilot micro-region project (1,250,000. EUR) is realized in the Moravian-Silesian region. The project is used as the investment support of the infrastructure development, tourism, agriculture and agriculture in the micro-region of Jeseníky, the implementation of the ROP. 27 projects have been implemented for the Moravian-Silesian Region in the total amount of approximately 340,000 EUR.

4.1.5 Programme Phare 2000

17.43 million EUR was allocated within the Phare 2000 programme - Economic and social cohesion for the Moravian-Silesian Region.

The programme has the following structure:

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9 The region of Bruntál from the micro-region of Jeseníky belongs to the Moravian-Silesian Region.
• CZ 0010.03 Grant schemes in support of the development of the human sources, innovative entrepreneurship and tourist infrastructure: **13.335 million EUR**:
  - **Fund for the Support of Innovative Entrepreneurship** is a grant scheme with the aim of increasing competitiveness in the area of SMEs, and in the development of enterprises. Totally 29 projects were financed in the amount of **5.935 million EUR**.
  - Grant scheme the **Tourist Infrastructure** has the task of contributing to the change of the region’s image from the environmentally harmed area to the tourist attractive locality. 30 projects were realized, for which Phare provided in total **4 million EUR**.
  - Scheme of the Development of the Human Sources provides grants in support of the social sphere. **3.4 million EUR** in total was invested into 32 projects.

• CZ 0010.03.02 Research-technological park Ostrava: **2 million EUR**. Investments flow into the development of the infrastructure.

• CZ 0016 Development of the Industrial Zone Ostrava-Mošnov: **2.1 million EUR**. Investments into the infrastructure are financed by means of Phare 2000. The Mošnov project was granted assistance from the Phare programme 1992 and 1996 and from the ADR.

4.1.6 Project Preparation Facility

In total, **1.8 million EUR** was allocated in the following structure:

• CZ 9916 Study for the purpose of the identification of the industrial groups in Northern Moravia, **0.2 million EUR**. The project should identify the potential competitive industrial groups in the region and the development of strategies and action plans for the purpose of the growth and development.

• CZ 9916 demonstrative regeneration project Ostrava/Vítkovice, **0.6 million EUR**.

4.2 Cross-border cooperation projects

For the Moravian-Silesian Region, bilateral programmes of the cross-border cooperation programmes with Poland and Slovakia are intended. There is not any trilateral programme among the Czech Republic-Poland-Slovakia.

Within the CREDO programme, in the years 1998-1999, the following projects were supported: in the area of tourism (**387,000 EUR**) in support of stimulating the cooperation with Poland and Slovakia, within the CBC programme, the projects of the transport infrastructure in Třinec (**4.6 million EUR**) and the road bypass Mosty u Jablunkova (**7 million EUR**):

CZ 9909, CZ-PL: within the CBC Czech Republic-Poland, the following projects were financed:

• **Třinecká Myší díra**: the railway reconstruction began in June 2001, the value of 3,509 million EUR, Phare contributed with the amount of 2.57 million EUR.
• **CZ 9909 Common Fund of Small Projects:** the programme comprises 54 projects in three euro-regions (Praděd, Silesia and Těšínské Slezsko). The value of the grant from Phare amounted to 160,903 EUR.

• **CZ 0013, CZ-PL:** the allocation for the region within the Common Fund of Small Projects with the value of 198,100 EUR (Silesia 74,400, Těšínské Slezsko 69,800, Praděd 53,900),

• **Orlické Záhoří – Mostowice:** the road reconstruction of II/311. The expected value of the project is 3,036 million EUR; the Phare contribution is expected of approximately 2 million EUR.

• **Třinec:** the road improvement of II/476. The expected Phare support of 2 million EUR.

• **CZ 0113:** the contribution for the entire Czech-Polish borders represents 500,000 EUR, the Moravian-Silesian Region will receive approximately 20 %, i.e. 100,000 EUR.

• **Euroregion Praděd, 2.3 million EUR,**

• **Orlické Záhoří-Mostowice, 2.2 million EUR.**

4.3 **Programme ECOS/OUVERTURE**
The projects within this programme (allocated in total **1,253,500 EUR**) are mainly aimed at the exchange of experience and technical assistance of the EU experts for the region. The following projects were implemented:

• **Master Plan Karviná Project (40,000 EUR):** the elaboration of the strategic plan of the development of the region of Karviná and Třinec (1993-1994),

• **VIGIE Project (300,000 EUR):** the information support of the region development (1995-1996),

• **SCAN Project (52,500 EUR):** the sharing and exchange of experience with the EU among regions affected by the restructuring of metallurgy (1996-1998),

• **RESCKO Project (590,000 EUR):** the sharing and exchange of experience in the conversion and restructuring process of metallurgical and mine companies (1996-1998),

• **REGVIS 2005 Project (271,000 EUR):** the key project intended only for Northern Moravia and Silesia (Moravian-Silesian Region), managed by the ADR Ostrava. One of its outputs is the strategy of the region development to the year 2005, which became the pilot project and model for the further regional strategies in the Czech Republic.

4.4 **Programme PALMIF**
Within the PALMIF programme, **926,000 EUR** was spent in total in the Moravian-Silesian Region till the end of the year 1998 on 34 projects oriented on the verification of new instruments of the labour market support, further on the decentralised local projects and on the centrally managed projects connected with the employment support. Nine projects were implemented with the total grant amount of **412,000 EUR** in the year 1999, seven projects for the creation of new jobs in the existing companies and two projects for the schooling and assertion of the graduates.
4.5 Programme ISPA

The maximum sum allocated for the Moravian-Silesian Region amounts to the total of 73.951.156 million EUR. This sum is divided into:

1. The approved projects in the area of the environment: in the year 2000, the city of Ostrava was granted a contribution of 16.664.682 million EUR from the ISPA fund for the sewerage development and the construction of the main services duct in the city centre with the expected period of construction in the years 2002-2005.

2. The approved projects in the area of transport:
   - Dobrá-Frýdek Místek (highway R48): 20.391.677 million EUR,
   - Bypass of Bělotína (R48): 17.117.121 million EUR,
   - Dobrá-Tošanovice (R48): 19.797.676 million EUR.
### 4.6 Programme SAPARD

Approved projects within the SAPARD programme in the Moravian-Silesian Region

<table>
<thead>
<tr>
<th>Year</th>
<th>Name of the applicant</th>
<th>Name of the project</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>AGRIMEX Brumovice s.r.o.</td>
<td>Reconstruction of the cowshed</td>
</tr>
<tr>
<td>2002</td>
<td>Agropodnik Dvorce, a.s.</td>
<td>Reconstruction of the cowshed</td>
</tr>
<tr>
<td>2002</td>
<td>Agropodnik Dvorce, a.s.</td>
<td>Reconstruction of the waste economy</td>
</tr>
<tr>
<td>2002</td>
<td>BIVOJ a.s.</td>
<td>Purchase and modernisation of the technical assembly lines for the meat processing</td>
</tr>
<tr>
<td>2002</td>
<td>DIEMA s.r.o.</td>
<td>Building conversion of the slaughter premises and the extension of the shipping department</td>
</tr>
<tr>
<td>2002</td>
<td>DIEMA s.r.o.</td>
<td>Building conversion of the poultry slaughter premises and the extension of the shipping department</td>
</tr>
<tr>
<td>2002</td>
<td>FARMA ORYX, spol. s r.o.</td>
<td>Reconstruction of the piggery</td>
</tr>
<tr>
<td>2002</td>
<td>Ing. Vít Antl Moravskoslezský Kočov</td>
<td>Reconstruction of the bull rearing for the rearing of heifers</td>
</tr>
<tr>
<td>2002</td>
<td>Jiří Szotkowski</td>
<td>Fish castle in Chotěbuz</td>
</tr>
<tr>
<td>2002</td>
<td>KIMBEX, s.r.o.</td>
<td>Increase in standards of fish treatment</td>
</tr>
<tr>
<td>2002</td>
<td>Town of Albrechtice</td>
<td>Reconstruction of the premises of the castle in Linhart</td>
</tr>
<tr>
<td>2002</td>
<td>Diary Místecká, s.r.o.</td>
<td>Reconstruction of the cottage cheese premises in Místecká diary s.r.o.</td>
</tr>
<tr>
<td>2002</td>
<td>Dairy Místecká, s.r.o.</td>
<td>Reconstruction of the cloakrooms, the purchase and installation of devices</td>
</tr>
<tr>
<td>2002</td>
<td>Dairy Kunín a.s.</td>
<td>Technology provision for filling fresh milk into PET bottles</td>
</tr>
<tr>
<td>2002</td>
<td>District of Bolačice</td>
<td>Reconstruction of the bike tracks and support of tourism in Hlučínsko</td>
</tr>
<tr>
<td>2002</td>
<td>District of Kunín</td>
<td>Zámek Kunín – gateway in to Poodří</td>
</tr>
<tr>
<td>2002</td>
<td>District of Ostravice</td>
<td>Reconstruction and extension of the fire station in Ostravice</td>
</tr>
<tr>
<td>2002</td>
<td>District of Sedlnice</td>
<td>Completion of a construction of the cultural and social facilities of the municipality</td>
</tr>
<tr>
<td>2002</td>
<td>District of Třanovice</td>
<td>Construction of the gym and library at the basic school in Třanovice</td>
</tr>
<tr>
<td>2002</td>
<td>District Land Office Nový Jičín</td>
<td>Construction of the back roads Bocheta C1a C11 in the region of Nový Jičín-Horní</td>
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<tr>
<td>2002</td>
<td>District Office Opava-Department of the District Land Office</td>
<td>Setting proprietor’s boundaries of the wood lands §21a) Act N.229/19</td>
</tr>
<tr>
<td>2002</td>
<td>District Office Opava-</td>
<td>Setting the proposal of KPU Darkovice</td>
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</table>
### Regional Development, Structural Policy and Re-conversion Models

<table>
<thead>
<tr>
<th>Year</th>
<th>Department of the District Land Office</th>
<th>Project Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>Livestock production company Nový Jičín a.s.</td>
<td>Reconstruction of the technological stabiling for the rearing of Kujavy-piglets</td>
</tr>
<tr>
<td>2002</td>
<td>Land Office Bruntál</td>
<td>Reconstruction of the back road in the region of Matějovice, the district of Bruntál</td>
</tr>
<tr>
<td>2002</td>
<td>Land Office Frýdek-Místek</td>
<td>Renewal of the back road Milíkov</td>
</tr>
<tr>
<td>2002</td>
<td>Land Office of the District Office of Karviná</td>
<td>Geodesic surveying of the lands including the GP in Albrechtice</td>
</tr>
<tr>
<td>2002</td>
<td>TOZOS spol. s r.o.</td>
<td>Welfare improvement in breeding pigs in the Lesní factory farming</td>
</tr>
<tr>
<td>2002</td>
<td>TOZOS spol. s r.o.</td>
<td>Welfare improvement of breeding the dairy cows</td>
</tr>
<tr>
<td>2002</td>
<td>V PRON, s.r.o.</td>
<td>Modernisation of the technologies in the production of poultry meat products</td>
</tr>
<tr>
<td>2002</td>
<td>V PRON, s.r.o.</td>
<td>Investments for the facilitating of the quality standard introduction</td>
</tr>
<tr>
<td>2002</td>
<td>ZELENINA Malé Hoštice, a.s.</td>
<td>Modernisation and diversification of the production technology of sauerkraut</td>
</tr>
</tbody>
</table>

Comment: RAN = registration application number

### Control questions:

1. Define the position of Moravian-Silesian Region among other NUTS II level regions in the Czech Republic.
2. What were the most difficult projects financed from EU sources in Moravian-Silesian region in past?
3. What EU structural policy goals are going to be applied in Moravian-Silesian region after the Czech Republic EU entry?
5. The signification of municipalities when restructuring Moravian-Silesian region

Europe is heterogeneous with all its cities. Roughly 20% of EU citizenship live in big cities with more than 250,000 people, another 20% live in middle-sized cities with 50,000-250,000 people and 40% live in smaller urban areas with 10,000 to 50,000 people. Around 80% of Europeans total live in cities.

In spite of a wide variety of European cities, they stay in front of a common task – their sustainable development. A sustainable city is a city, which can offer its inhabitants high-quality environment, the ones, who want to work, can find a job, housing, education possibilities for children. A city, which sparingly and efficiently uses its own and outside sources, responsibly handles energy and waste, minimizes impact on environment on a local and global scale. A city, which looks for mutually strengthening goals and strategies and puts through measures, which:

- Improve economic vitality of cities, especially in undeveloped areas by supporting innovations, increasing productivity and using new sources of employment not only in small and middle-sized cities, but in big cities as well and support polycentric, balanced European urban system.
- Allow the access to the results of the increased productivity and competitiveness in an appropriate manner, reduce social expulsion and increase safety.
- Contribute to building of sustainable cities from a viewpoint of environment and prevent transferring of the cost of development on their immediate surroundings, bordering countryside etc.
- Support innovational and flexible decision-making processes and urban institutions, which will increase participation of a community on decision making and integrate measures of partners from public and private sectors, from European level to local and increase synergy and cooperation among today's and institutional processes and sources.

Already mentioned structural funds are the main tool of EU dedicated to support municipalities. Concrete projects were specified in the previous chapter. They were carried out in towns and cities in Moravian-Silesian region and supported by EU within the pre-accession assistance. Due to poor experience of municipalities with getting assistance from EU sources (which is reflected in their low successfulness in this area) and very serious economic and social problems they have to cope as a consequence of restructuring of Moravian-Silesian region economy, their budgets have to significantly participate in the solution of these problems. Beside various support programmes for SME, preparation of industrial zones is nowadays very popular "tool" of region policy (restructuring) among towns and cities in the region. Karvina is one of the cities, which successfully applied this kind of support of economic-social development. The case study for this module is devoted to the starting points, implementation progress and results.

The control questions on this theme are given within the case study for this module.
2.8 Appendix

The Questionnaire for WP 6 and WP 11 modules Assessment

A. Part – Identification data

*Check the relevant variants with a cross or fill out a box*

<table>
<thead>
<tr>
<th>Identification data</th>
<th>Variants</th>
<th>X</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Assessed module</td>
<td>1. Models of Reconversion Processes</td>
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<tr>
<td>1. (put a cross into</td>
<td>2. Financial Sources for Re-conversion Process</td>
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<td>a box next to the</td>
<td>3. Centre for restructuring management in hard-coal mining and</td>
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<td>relevant module)</td>
<td>their coordination</td>
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<td>4. Environmental management in Reconversion Process</td>
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<td>5. Restructuring (destination) management for the tourism</td>
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<td></td>
<td>development in the Moravia-Silesia Region</td>
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<tr>
<td>2. The target group</td>
<td>2.1 Municipality representative</td>
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<tr>
<td></td>
<td>2.2 Private entrepreneur</td>
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<td></td>
<td>2.3 Small or middle sized company manager</td>
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<td>2.4 Large company manager</td>
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<td></td>
<td>2.5 Non-governmental/non-profit organisation representative</td>
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<td>2.6 Public institution representative</td>
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<td>2.7 Teacher (elementary school, high school, university)</td>
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<td>2.8 Student (high school, university)</td>
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<td>2.9 Other</td>
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<td>3. Date:</td>
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</tbody>
</table>

B. Part – Motivation and module suitability assessment

*Cross the corresponding check-box indicating your choice.*

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Y</th>
<th>E</th>
<th>S</th>
<th>Tendency</th>
<th>N</th>
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</thead>
<tbody>
<tr>
<td>1. Was your participation in the module a result of identification of</td>
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<td>your development needs?</td>
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<td>2. Has the module contributed to your personal development?</td>
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<td>3. Has the module contributed to your professional development?</td>
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<td>4. Were there any other development possibilities identified during the</td>
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<td>module?</td>
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<td>5. Did the combination of the form and content (focus) support your</td>
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<td>learning process?</td>
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<td>6. Was the module contributive for you on the whole?</td>
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<td>7. Would you recommend the module to your acquaintances/colleagues at</td>
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<td>work?</td>
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<td>8. Is the module contributive in your opinion for the regions which are</td>
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<td>going through restructuring process of their economics?</td>
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<td>9. Is the module contributive in your opinion for the Moravia-Silesia</td>
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<tr>
<td>Region?</td>
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<td>10. Was the module clear and easy to understand?</td>
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</tbody>
</table>
C. Part – Content, form and organization assessment of the course

*Cross the check-box with the corresponding assessment*

<table>
<thead>
<tr>
<th>Criterion</th>
<th>☺</th>
<th>1</th>
<th>2</th>
<th>3</th>
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<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The module theme and content were new and inspiring</td>
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<td>2. The module theme and content were inspiring</td>
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<td>3. The module aims and intentions were clearly explained</td>
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<td>4. The module content corresponded with the aims set</td>
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<td>5. Enough space was given to the set module aims</td>
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<tr>
<td>6. The study materials (texts, case studies etc.) were apt and relevant to the module content</td>
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<td>7. Methodological text processing and the use of supplementary graphic elements was sufficient and appropriate</td>
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<td>8. The lecturer(s) focused on the module aim(s)</td>
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<td>9. The lecturer(s) acted professionally and were well informed in the respective field</td>
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<td>10. The lecturer(s) spoke intelligibly, they gave clear explanations</td>
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<td>11. The module was well administratively prepared</td>
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<tr>
<td>12. The organization of teaching supported the module focus and content</td>
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</tbody>
</table>

D. Part - Suggestions

*Fill out the appropriate boxes with your suggestions and remarks.*

<p>| | | | | | | |</p>
<table>
<thead>
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</thead>
<tbody>
<tr>
<td>1. Which parts of the module do you consider to be the most important?</td>
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<tr>
<td>2. Would you leave out any of the parts of the module? Which ones?</td>
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<tr>
<td>3. Did you miss anything? What did you miss?</td>
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<tr>
<td>4. Do you have any suggestions and recommendations for the module content?</td>
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<tr>
<td>5. Do you have any other remarks / suggestions?</td>
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<tr>
<td><strong>Title:</strong></td>
<td>Regional Development, Structural Policy and Re-conversion Models</td>
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<tr>
<td><strong>Author:</strong></td>
<td>Ing. Marian Lebiedzik, Ph.D.</td>
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