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Eduardo Medeiros *Editor*

Public Policies for Territorial Cohesion



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Eduardo Medeiros
Editor

Public Policies for Territorial Cohesion

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Eduardo Medeiros
DINÂMIA'CET—IUL
Instituto Universitário de Lisboa
(ISCTE-IUL)
Lisboa, Portugal

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Foreword

The newly launched ESPON 2030 Programme has a mission to provide territorial evidence to stakeholders at all levels in order to help them achieve green transition to climate-neutral economies, while ensuring at the same time just living conditions for all people in all places.

While embarking on the two pillars of the EU Cohesion Policy, namely: Green and Just Transition, ESPON adds to that the territorial dimension, through promoting functional area's and place-based approach to development actions, projects and initiatives.

ESPON advocates for the central role of Territorial Cohesion in design, implementation and evaluation of public policies. To achieve that, ESPON delivers observations on territorial trends, patterns, challenges and opportunities in the territory of the 27 EU Members States and the four Partner States of Iceland, Liechtenstein, Norway and Switzerland, and facilitates the transfer of territorial knowledge to stakeholders at all levels, from the EU down to the local.

Under this stance, this Book offers a useful tool to both academic, decision-makers, and practitioners, to better align the implementation of public policies towards a more cohesive European territory. It does so by debating critical dimensions of Territorial Cohesion, such as economic competitiveness, social inclusion, environmental sustainability, territorial governance/cooperation and spatial planning.

Wiktor Szydarowski
Director of the ESPON EGTC
Luxembourg, Luxembourg

Introduction

Abstract Despite being mentioned in some European Union (EU) official documents since the early 2000s, territorial cohesion has been a very much misunderstood policy concept, and not many books have been published to extend debate on its conceptual and policy relevance. In this context, the proposal of this book is to discuss the role of public policies in promoting territorial cohesion processes in all the main dimensions of the territorial cohesion concept. In this stance, here for the first time in a book, all these dimensions are addressed, considering territorial cohesion as “the process of promoting a more cohesive and balanced territory, by (i) supporting the reduction of socioeconomic territorial imbalances; (ii) promoting environmental sustainability; (iii) reinforcing and improving the territorial cooperation/governance processes; and (iv) reinforcing and establishing a more polycentric urban system”.

Keywords Territorial Cohesion · EU Cohesion Policy · Territorial Agendas · EU Development Agendas · Territorial Development

From this outlook, this book presents a novel and more comprehensive analysis of territorial cohesion, supporting a logic of the structure and the content of the chapters. In Part I, EU and national public policies for territorial cohesion are debated, and the following four parts are respectively dedicated to each of the previously mentioned main analytic dimensions of territorial cohesion. As such, this book has the potential to attract to a vast audience of academics and policymakers, not only on the scientific fields of regional and urban studies but also in: (i) spatial planning and development theory; (ii) EU policies applied to European territories; (iii) socioeconomic development; (iv) environmental sustainability; (v) territorial cooperation and (vi) territorial governance.

In a context in which the EU and national entities have struggled to find strategies to achieve more balanced and cohesive territories at the national level, this book provides critical debate on these EU and national strategies, whilst proposing theoretical and

practical policy responses which can invert current territorial exclusion trends vis-à-vis those of intended territorial cohesion. These analyses will be addressed in Part I of the book, in two chapters. Chapter 1, written by the editor, is focused on discussing the extent to which mainstream EU development strategies and EU Cohesion Policy are aligned and contribute to promoting territorial cohesion policies at all territorial levels. Chapter 2 complements the previous one by addressing the role of national policies to foster territorial cohesion, based on a very recent implementation of the EU Recovery Plan in Portugal. Part I of the book thus provides a comprehensive introduction to contemporary thinking about how public policies in certain areas can play a decisive role in boosting territorial cohesion processes in a given territory.

Part II of the book embraces a crucial dimension of territorial cohesion policies: socioeconomic cohesion. This dimension encompasses two main policy processes and respective components. Firstly, the process of economic competitiveness and secondly the process of social cohesion. Ultimately, a more balanced, harmonious and cohesive territory requires public policies which address socioeconomic development policies with the aim of reducing socioeconomic disparities. In this line, this part of the book analyses the contribution of socioeconomic development processes, with a particular focus on the discussion of social protection (Chap. 3) and social collaboration in cross-border territories (Chap. 4), and its potential policy contribution towards more cohesive territories.

Part III addresses yet another critical territorial cohesion dimension: environmental sustainability. Crucially, in an age of global warming and increasing pollution of all sorts, green public policies are crucial in promoting sustainable development for the protection of our planet and species. These sustainable, development-based policies should provide an insightful guide to all public development and cohesion policies, and their capacity to promote environmental protection and a green and circular economy needs to be considered when measuring territorial development trends in a given territory. As in the previous and following parts of the book, this part includes two chapters. The first (Chap. 5) is dedicated to examining the potential role of the current Territorial Agenda (2030) to address the environmental challenges faced by European territories towards increasing spatial justice and cohesion. As a complement, the next chapter (Chap. 6) addresses the increasingly important policies supporting sustainable urbanization, which are particularly relevant in a highly urbanised continents such as Europe.

Following the previous part of the book, this part is now centred on the debate around the importance of urban-related policies in promoting more harmonious, balanced and cohesive territories. The rationale behind these analyses is that more connected, polycentric, dense and efficient urban systems can contribute to increasing territorial cohesion. To this end, sound and effective spatial planning processes are required. As such, the first chapter in this part (Chap. 7) examines the role of urban and regional planning for implementing territorial cohesion policies. In addition, in Chap. 8 a more generic academic analysis is laid out on the role of spatial planning in effectively supporting territorial cohesion policies.

The last part of this book is dedicated to the debate on two increasingly recognised processes of sound territorial development, also viewed by some as a pillar for achieving territorial cohesion processes: territorial cooperation and governance. Hence, Chap. 9 reviews the implemented European territorial cooperation programmes since the early 1990s and assesses their potential positive contribution for promoting a more integrated and balanced European territory by, for instance, mitigating all sorts of border barriers across Europe. In turn, the last chapter (Chap. 10) builds on the discussion of implemented European Groupings of Territorial Cooperation (EGTCs) in Europe to solidify multi-level territorial governance processes, as a means to achieving more cohesive territories.

Reflecting on an overall lack of knowledge on how territorial cohesion processes can be achieved via the implementation of public policies, one of the main arguments for the publication of this book is the examination and presentation of concrete policy arenas which can contribute to more balanced and cohesive territories. By considering a multi-dimensional approach, this book provides a more comprehensive and holistic approach to analysing territorial cohesion, as well as the nature of challenges and identification of potential policy strategies to achieve more balanced and cohesive territories. With this approach, this book is intended to be the first to comprehensively discuss the contribution of public policies to territorial cohesion. In sum, the main objectives of this book are to:

- Provide a comprehensive theoretical and practical discussion of how public policies can contribute to territorial cohesion trends and processes in a given territory;
- Provide key messages to academics and policymakers on how to implement public policies to achieve territorial cohesion trends and processes in a given territory;
- Provide a key bibliography resource for students in several university courses covering various academic domains like European policies, regional, urban, and border studies, governance, social inclusion, environmental sustainability, spatial planning, geography, economy, policy evaluation, etc.;
- Identify and discuss key policy areas critical to promoting territorial cohesion policy strategies;
- Address the importance of social, economic, environmental, governance, cooperation, and spatial planning process in achieving territorial cohesion trends and processes in a given territory.
- As can be seen, the chapters are written by some of the most renowned experts on the book's main theme, including scholars from several European countries, as well as the EU officials and secretary generals of EU entities. The goal here is to combine theoretical perspective with more practical experiences from policymakers and practitioners at the EU level. Crucially, this text will thoroughly prepare students and provide knowledge to academics and policymakers in the fields of territorial cohesion, which is still a quite misunderstood concept, globally speaking. Indeed, despite the publication of some articles and a few books on

territorial cohesion processes, there is a clear lack of appropriate literature aimed at understanding how public policies can foster territorial cohesion trends at all spatial levels.

Lisboa, Portugal

Eduardo Medeiros
eduardo.medeiros@iscte-iul.pt

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Editor and Contributors

About the Editor

Eduardo Medeiros is a Geography Professor and an Integrated Research Fellow in DINÂMIA'CET-IUL, Instituto Universitário de Lisboa, Portugal. He has a Ph.D. in Geography—Regional and Urban Planning, and has more than 150 publications, including more than 30 published papers in international journals, 10 books and 13 book chapters. His research interests are focused on Territorial Impact Assessment, Territorial Cohesion, Territorial Development, Territorial Cooperation and Spatial Planning. He is a DG REGIO (European Commission) and UEBACT III expert, and a Horizon 2020 evaluator. He is also a Regional Studies Association fellow, and belongs to its Cohesion Policy Research Network. He has coordinated several international policy evaluation projects and was a member of DG REGIO and ESPON projects. He was invited as a project adviser and to write reports and position papers by DG REGIO. He was already invited to be a keynote speaker by several International Universities and EU institutions (European Commission and Committee of the Regions). He is part of the scientific and editorial committee of several journals and a peer reviewer of more than 35 international journals.

Contributors

Sérgio Caramelo Instituto Universitário de Lisboa (ISCTE-IUL), Lisboa, Portugal

Giancarlo Cotella Interuniversity Department of Regional and Urban Studies and Planning, Politecnico Di Torino, Torino, Italy

Gavin Daly ESPON/University of Liverpool, Liverpool, UK;
Luxembourg-Kirchberg, Grand Duchy of Luxembourg

Barbara Demeterova Department of Geography, Economic Geography, Ludwig Maximilian University of Munich, Munich, Germany

Renato Miguel do Carmo Instituto Universitário de Lisboa (Iscte), Cis-Iscte, Lisbon, Portugal

Nuno Duarte University of Évora, UMPP—Public Policy Monitoring Unit, CICS.NOVA.UÉvora, CIES.ISCTE.IUL, CEFAGE.UÉ, Évora, Portugal; Directorate-General for Justice Policy, Directorate of Justice Statistics and IT Services, Justice Statistics Division, Lisbon, Portugal

Joaquín Farinós-Dasí IIDL and Department of Geography, University of Valencia, Valencia, Spain

João Fermisson University of Évora, UMPP—Public Policy Monitoring Unit, CICS.NOVA.UÉvora, CIES.ISCTE.IUL, CEFAGE.UÉ, Évora, Portugal; ImproveConsult - Consultoria e Estudos, Lda, Lisbon, Portugal

Bernardo Fernandes Instituto Universitário de Lisboa (Iscte), Cis-Iscte, Lisbon, Portugal

Martín Guillermo-Ramírez Association of European Border Regions (AEBR), Berlin, Germany

Eduardo Medeiros Instituto Universitário de Lisboa (ISCTE-IUL), Lisboa, Portugal

Paulo Neto University of Évora, UMPP—Public Policy Monitoring Unit, CICS.NOVA.UÉvora, CIES.ISCTE.IUL, CEFAGE.UÉ, Évora, Portugal

Gyula Ocskay UPS-CESCI Research Group of Cross-Border Cooperation, University of Public Service, Budapest, Hungary

Oto Potluka Center for Philanthropy Studies, University of Basel, Basel, Switzerland

António Rodrigues University of Évora, UMPP—Public Policy Monitoring Unit, CICS.NOVA.UÉvora, CIES.ISCTE.IUL, CEFAGE.UÉ, Évora, Portugal

Lina Schubnell Public Und Non-Profit Management, Freiburg Im Breisgau, Insbesondere Corporate, Albert-Ludwigs-Universität, Freiburg im Breisgau, Germany

James W. Scott Faculty of Social Sciences and Business Studies, Karelian Institute, University of Eastern Finland, Kuopio, Finland

Francisco Simões Instituto Universitário de Lisboa (Iscte), Cis-Iscte, Lisbon, Portugal

Part I
EU and National Public Policies
for Territorial Cohesion

Chapter 1

EU Policies and Strategies and Territorial Cohesion



Eduardo Medeiros and Sérgio Caramelo

Abstract Territorial cohesion is an EU concept and, in recent decades, several EU policies, such as the EU Cohesion Policy, have contributed decisively to promoting territorial development in socioeconomically lagging EU regions. It resembles a European political ideal that collectively we try to achieve, but without knowing very well what it is. However, as several studies have concluded, although at the EU level certain territorial cohesion trends have been attained in some policy arenas, at the national level there is no clear evidence that EU policies have contributed to achieving territorial cohesion trends in recent decades in EU member states. In this context, this chapter critically discusses the evolution of EU policies and strategies to promote territorial cohesion in the EU territory since the implementation of the EU Cohesion Policy (1989). Crucially, it presents a critical overview of policy rationales presented by EU development agendas (e.g. Lisbon, Europe 2020, etc.), the European Spatial Development Perspective, the Green Paper for Territorial Cohesion, as well as the three EU territorial agendas. It concludes that territorial cohesion has never been at the core of EU mainstream development agendas and that the territorial agendas have not yet contributed to inverting this panorama. It also concludes that EU Cohesion Policy, with the exception of the current programming period (2021–27) has never included all the crucial dimensions of territorial cohesion in its main strategic objectives: socioeconomic cohesion + environmental sustainability + territorial cooperation/governance + morphologic polycentricity.

Keywords Territorial cohesion · EU cohesion policy · Territorial agendas · EU development agendas · Territorial development

E. Medeiros (✉) · S. Caramelo
Instituto Universitário de Lisboa (ISCTE-IUL), Lisboa, Portugal
e-mail: eduardo.medeiros@iscte-iul.pt

1.1 Introduction

It is widely acknowledged that territorial cohesion is mainly a European Union (EU) concept, and is still fuzzy and vague (Dao et al. 2017; Medeiros 2016b). This EU policy concept took central stage, in a formal manner, in the EU Amsterdam treaty (Servillo 2010). However, its meaning and policy relevance have since remained largely contested (González et al. 2015) and subject to systematic negotiations (Van Well 2012). On a positive note, territorial cohesion has triggered a novel dimension in EU policy debates (Davoudi 2005), and contributed to stimulating a wealth of literature on the relevance of the territorial dimension of policies (Medeiros 2017a). It has also given rise to a more comprehensive impact assessment method to be used by EU entities, named territorial impact assessment (TIA) (Medeiros 2020d). Moreover, as Schön (2005) and Abrahams (2014) claim, territorial cohesion has become a new buzzword for a European spatial planning strategy, largely focused on a polycentric urban network rationale, and as a counterbalance of the policy-centred growth and competitiveness rationale (Vanolo 2010). On the other hand, to invoke Faludi (2007), territorial cohesion has also contributed to reinforcing the notion of a European model of society in concrete policy areas on various territorial scales.

It is under this dual policy and scientific background that this chapter proposes to present an overall overview of the relevance of territorial cohesion for mainstream EU policy development strategies. Firstly, territorial cohesion is now both a formal and relatively invoked EU policy goal and is still somewhat debated and analysed by several scholars, both in terms of its conceptual meaning and, in lesser measure, presenting methods to measure its trends in a given territory. Secondly, so far, territorial cohesion has never truly taken centre stage in EU development strategies and the main goals of EU Cohesion Policy. Likewise, in the academic domain, territorial cohesion studies and analysis have never attracted the attention of the academic community in comparison to regional and urban development and planning studies, and especially economic growth-related analysis.

In this context, the research fundamental question of this chapter is: “How far is territorial cohesion considered in EU mainstream development strategies as a key EU public policy?” As regards public policies, a wealth of literature advances that public policies fail if they do not reach their main goals and expected target groups (Huencho 2022). In addition, the whole life cycle of public policy, with possible feedbacks between different territorial levels, should be considered in this analysis (Saurugger and Radaelli 2008). Mainstream literature on public policies recognises the importance of leadership and institutional environment (Cardoza et al. 2015), administrative capacity (Lindstrom 2021; Medeiros and Potluka 2021), and socio-economic status (Shao et al. 2021), amongst other contexts, which determine the degree of their successful implementation. In this chapter, however, the methodological approach draws mostly on desk research and on available scientific literature, as well as the reading of official EU documents. The three following sections organise

the research. The next discusses the relation and contribution of EU strategic development agendas to the EU policy goal of territorial cohesion. The third section elaborates on the strategies of EU Cohesion Policy frameworks to effectively (or not) promote territorial cohesion policies at the EU and national levels. The subsequent chapter highlights the role of the three EU territorial agendas to implement territorial cohesion policies. Finally, the last section concludes the analysis.

1.2 EU Strategic Development Agendas and Territorial Cohesion

The European integration project started in 1957 with a strong economic and market liberalisation rationale. However, the Treaty of Rome, signed in the same year, already recognised the need for a harmonious development of economic activities, which can be regarded as a starting point for a EU territorial cohesion policy goal (Colomb and Santinha 2014). Indeed, as a policy and political concept, territorial cohesion has been in the EU policy agenda for many decades and has gained prominence since the 1990s as a set of principles for a more balanced, harmonious, sustainable and efficient territorial development of the EU (Clifton et al. 2016). This basic policy rationale has evolved gradually in EU documents, and the academic discourse, as Zaucha and Böhme (2020) uphold, in which notions and policy goals such as territorial governance, territorial cooperation, territorial integration, spatial planning, territorial resiliency, and territorial sustainability are associated with territorial cohesion policies.

It is crucial to point out, however, that the notion of territorial cohesion only appeared in EU documents in 2001, in the Second Cohesion Report (EC 2001a), and later on the Third Cohesion Report (EC 2004). This was largely influenced by the previous publication of the European Spatial Development Perspective (ESDP) (EC 1999), which invoked the need for an harmonious and balanced development of the Union as a whole (Janin Rivolin 2005), and by the French “*Aménagement du territoire*” spatial planning approach (Faludi 2004).

In formal terms, however, the policy goal of territorial cohesion was only included in a key EU policy goal in the Treaty of Lisbon, which was signed in 2007 and entered into force in 2009 (Colomb and Santinha 2014). In the meantime (2008), the only EU key document on territorial cohesion was published as the Green Paper on Territorial Cohesion (EC 2008a), amid overall EU member states’ intention to stimulate discussion, with the hope of some form of consensus emerging (Faludi 2013). But as Chamusca et al. (2022) conclude, many references to the territorial dimension of EU policies are commonly mentioned in several European documents, before and after the publication of the Green Paper on Territorial Cohesion. Even so, in normative terms, this paper embraces several policy areas which are seen to be critical in materialising territorial cohesion processes, including concentration, connectivity and cooperation policy goals (EC 2008a).

While the Lisbon and Gothenburg Agendas clearly neglected the territorial dimension of EU policies, for Chamusca et al. (2022), 10 years later (2010), the Europe 2020 strategy end up reinforcing the territorial cohesion dimension of EU policies. It incorporated the notion of territorial cohesion in its text, as well as a functional and multi-level governance and a place-based approach for implementing EU policies. In tandem, the same authors claim that the EU Agenda 2030, adopted in late 2020, recognises the need to foster an EU territorial cohesion action-oriented framework via a place-based approach.

Table 1.1 presents a summary of the relation between the post-2000 EU mainstream strategic development agendas and their relationship with territorial cohesion crucial components. Starting with the EU Lisbon Strategy, which was launched in March 2000 with the main goal of making Europe the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion (EP 2010), it is immediately evident that it follows a socioeconomic-centric vision of development for the EU, with no mention of sustainably based and balance-based development approaches. In view of this, in the following year (2001) the EU Gothenburg Strategy complemented the Lisbon Strategy policy goals by highlighting the need for a sustainable development approach, since “economic growth, social cohesion and environmental protection must go hand in hand” (EC 2001b: 2). As seen, some key territorial cohesion policy domains such as territorial governance, polycentrism and territorial cooperation (see Medeiros 2016b) were not highlighted as paramount development arenas in these strategies.

In 2005, a revised Lisbon Strategy was released with a new set of integrated guidelines and specific areas for priority actions, which continue to be supported by the mainstream development triad, economy + society + environment, although with an increased focus on growth and jobs via a 3-year policy cycle (EC 2005). In 2010, a 10-year EU strategy named Europe 2020 replaced the Lisbon Strategy. Then again, the economic centric growth policy rationale guided its main goals. Curiously, the goal of territorial cohesion appeared in these goals for the first time but was linked to the goal of “inclusive growth” to ensure that “the benefits of growth and jobs are widely shared and people experiencing poverty and social exclusion are enabled to live in dignity and take an active part in society” (EC 2010a, b: 4). Further on, this strategy reveals that “it is also essential that the benefits of economic growth spread to all parts of the Union, including its outermost regions, thus strengthening territorial cohesion” (EC 2010a, b: 20). It is not surprising that territorial cohesion is included in this strategy since it was included in the Lisbon Treaty in 2009 as a main EU policy goal, alongside economic and social cohesion. This justifies the Europe 2020 intention that “economic, social and territorial cohesion will remain at the heart of the Europe 2020 strategy to ensure that all energies and capacities are mobilised and focused on the pursuit of the strategy’s priorities. Cohesion policy and its structural funds, while important in their own right, are key delivery mechanisms to achieve the priorities of smart, sustainable and inclusive growth in member states and regions” (EC 2010a, b: 20). As seen, in general terms, territorial cohesion is viewed by the Europe 2020 strategy as a mere policy accessory to social inclusion,

Table 1.1 Mainstream EU development strategies/agendas since 2000

Strategy/agenda	Main goals	Related components of territorial cohesion
Lisbon—2000	<ol style="list-style-type: none"> 1. Preparing the transition to a knowledge-based economy and society by better policies for the information society and R&D, as well as by stepping up the process of structural reform for competitiveness and innovation and by completing the internal market 2. Modernising the European social model, investing in people and combating social exclusion 3. Sustaining the healthy economic outlook and favourable growth prospects by applying an appropriate macro-economic policy mix 	<ul style="list-style-type: none"> – Economic competitiveness – Social cohesion
Gothenburg—2001	<ol style="list-style-type: none"> 1. Economic growth 2. Social inclusion 3. Environmental protection 	<ul style="list-style-type: none"> – Economic competitiveness – Social inclusion – Environmental sustainability
Lisbon revised—2005	<ol style="list-style-type: none"> 1. Investing more in knowledge and innovation 2. Unlocking business potential, especially for SMEs 3. Increasing employment opportunities for priority categories 4. Climate change and energy policy for Europe 	<ul style="list-style-type: none"> – Economic competitiveness – Social inclusion – Environmental sustainability
Europe 2020—2010	<ol style="list-style-type: none"> 1. Smart growth: developing an economy based on knowledge and innovation 2. Sustainable growth: promoting a more resource efficient, greener and more competitive economy 3. Inclusive growth: fostering a high-employment economy delivering social and territorial cohesion 	<ul style="list-style-type: none"> – Economic competitiveness – Social inclusion – Environmental sustainability
EC 2019–2024—2019	<ol style="list-style-type: none"> 1. A European Green Deal 2. A Europe fit for the digital age 3. An economy that works for people 4. A stronger Europe in the world 5. Promoting our European way of life 6. A new push for European democracy 	<ul style="list-style-type: none"> – Economic innovation – Social inclusion – Environmental sustainability – Democracy

and EU Cohesion Policy a critical policy tool to materialise this policy goal via the support to smart, sustainable and inclusive growth. On a positive note, the delivery of a stronger governance process is invoked by the Europe 2020 strategy; however, no mention is made of the need for a more balanced, polycentric and harmonious territory, nor for the support for European territorial cooperation processes.

For the period 2019–2024, the EC proposed six main development priorities, topped by the European Green Deal, with the goal of transforming the EU into a modern, resource efficient and competitive economy by ensuring: (i) no net emissions of greenhouse gases by 2050; (ii) economic growth decoupled from resource use; and (iii) that no person and no place be left behind. This later component clearly has a character of territorial cohesion. However, this Green Deal does not make a single mention of the need to foster a more cohesive and balanced territory. Even so, it mentions that “the urban dimension of cohesion policy will be strengthened, and the proposed European Urban Initiative will provide assistance to cities to help them make best use of opportunities to develop sustainable urban development strategies” (EC 2019: 23).

1.3 EU Cohesion Policy and Territorial Cohesion

As the name indicates, EU Cohesion Policy was forged with the intention of promoting a more cohesive EU territory (Medeiros 2017b), and ultimately territorial cohesion trends (Molle 2007). Since territorial cohesion is a multi-dimensional concept (Garau et al. 2020; Medeiros 2017b), this goal can be achieved in a myriad of ways. For, Chamusca et al. (2022), for instance, EU Cohesion Policy has played a critical role in promoting more balanced territorial development and strengthening a culture of spatial planning.

In simple terms, EU Cohesion Policy is the main EU policy tool for achieving territorial cohesion trends, by means of its various funds: the European Regional Development Fund (ERDF), the European Social Fund (ESF), and the Cohesion Fund (CF) (see Rauhut and Costa 2021). Indeed, it has become commonplace to recognise EU Cohesion Policy as a cornerstone EU Policy for addressing territorial development in the EU, not only because of its financial package (representing a third of the EU budget), but also because it benefits all EU regions, one way or the other (Crescenzi and Giua 2020). Concerning the latter factor, the systematic enlargement process of the EU towards the east has increased territorial development imbalances and has placed more challenges to EU Cohesion Policy as the main instrument of addressing EU regional inequalities (Madanipour et al. 2021).

Despite the many metamorphoses suffered by EU Cohesion Policy over the past decades to adapt to new policy and development contexts (Medeiros 2014, 2017a, b, c), it is still deemed to act as a mechanism of redistribution and solidarity (Crescenzi et al. 2020). Clearly conceived from the outset as a distributive instrument to improve the economic performances of the less developed regions, Cohesion Policy allocation of funding has been aligned with economic indicators such as GDP per capita

(Vinci 2021). From a strategic design standpoint, however, several changes have been implemented over the several passing programming periods (Medeiros 2020c).

For instance, in the last programming period (2014–2020), increasing attention was given to integrated sustainable urban development by EU Cohesion Policy, not only because it embraces a green policy rationale, which is globally acknowledged as the only viable path for preserving the planet and our species (Sachs 2015), but also because of the increasing importance of urban areas in Europe and the world as engines of development and attractive places to live (UN 2020). Moreover, the policy integration rationale offers a range of more effective solutions for policy implementation, especially relevant in the context of urban development and planning policies (Medeiros and van der Zwet 2020a; b; Mendez et al. 2021).

Curiously, or not, Gagliardi and Percoco (2017: 856) reveal the importance of urban areas in translating positive development impacts of EU Cohesion Policy, as well as rural areas close to cities, which have “benefitted most from the growing opportunities created by the policy by accommodating the increasing demand for available space in the surroundings of main urban agglomerates”. Likewise, Bachtrögl et al. (2020) conclude that these impacts tend to be larger in relatively poor countries, which can justify territorial cohesion trends at the EU level in past years (Medeiros 2016b). Conversely, others argue that territorial cohesion policies are often defined and shaped by the institutions involved (Faludi 2016), and are where the principle of subsidiarity is effectively implemented (Moodie et al. 2021).

In our view, however, for the current programming period (2021–2027), the proposed five policy objectives of EU Cohesion Policy (see Table 1.2) are, for the first time, closely aligned with the main dimensions of territorial cohesion (see Medeiros 2016b). Firstly, the goal towards a more competitive and smarter Europe is related to a dimension of economic competitiveness, which has always been present in all main objectives of EU Cohesion Policy programming periods. The support for social inclusiveness, as yet another critical dimension of territorial cohesion, is also present in the current and previous EU Cohesion Policy phases. What is new since the 2014–2020 programming period is the identification of specific main policy goals towards supporting environmental sustainability. Moreover, since 2007, European territorial cooperation has become a central EU Cohesion Policy goal, following three phases of the Interreg community initiative (Medeiros 2018a, b).

In almost every way, the 2014–2020 phase of EU Cohesion Policy also brought to the fore the need for investment in territorial governance-related components, like support for improved administrative capacity of public administration (Bachtler et al. 2014). Indeed, until 2006, the main policy goals of EU Cohesion Policy were concentrated on promoting socioeconomic cohesion in EU territories. It is true that several EU community initiatives (Table 1.3) with more targeted policy intervention goals like the Interreg community initiative (EC 1990) complemented this overarching EU policy goal in specific policy areas. Since 2021, however, a manifested separate priority of EU Cohesion Policy was directed towards promoting a more connected Europe, a policy goal which is clearly related to the morphologic polycentricity dimension of territorial cohesion. In sum, the evolution of all the main policy goals of EU Cohesion Policy in all its phases has evolved towards a more