

BID FOR TENDER 2004 ESPON PROJECT 3.3
Territorial dimension of the Lisbon/Gothenburg Process

1.06.2004

Lead Partner:

CENTER FOR INTERNATIONAL STUDIES
ON ECONOMIC GROWTH (CEIS)
University of Rome "Tor Vergata"



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1. SUMMARY PRESENTATION OF THE TENDERER AND THE CONSORTIUM

For the tender **Territorial dimension of the Lisbon/Gothenburg Process**, the Consortium led by the Centre for International Studies on Economic Growth (CEIS) submits the following project proposal.

1.1 Short description of the CEIS

The **Centre for International Studies on Economic Growth (CEIS)**, created in 1987, is part of the Faculty of Economics of the University of Rome “Tor Vergata”. Its aim is to promote advanced training and high-quality research in economics. CEIS organises seminars and conferences, establishes joint programmes with other universities, national institutions and international organisations, and organises research in all fields of economics. Research is carried out not only by members of CEIS, but also by appointed scholars from other institutions. CEIS gives particular emphasis on its publishing activity which includes: the CEIS working papers, the bimonthly CEIS Newsletter, *Labour*, *Labour* (a quarterly international journal published by Blackwell), and a series of books and monographs published by Il Mulino.

President: Luigi Paganetto

Director: Giovanni Tria

Advisory Committee: Henry J. Aaron, Anthony B. Atkinson, Michael J. Boskin, Victor Corbo, Jean Paul Fitoussi, Enzo Grilli, Alexis Jacquemin, Robert A. Mundell, Edmund S. Phelps, Dominick Salvatore, Joseph E. Stiglitz, Lawrence H. Summers, Vito Tanzi

Research Activity

CEIS research activity is carried out both by the centre's own researchers and scholars from outside. The Centre's activities can be classified into the following broad areas:

- 1) European Economy and International Integration,
- 2) Welfare State and the Labour Market,
- 3) New Technologies,
- 4) Money and Finance,
- 5) Public Policy,
- 6) Econometric Methods,
- 7) Economic Development and Globalisation.
- 8) Sustainable spatial development and territorial studies

Since its foundation, CEIS has established close contacts with international academic and research institutions. In particular the centre takes active part in the creation of thematic networks in all fields of economics, mainly at the European level. This has led to several research contracts with the European Community and other international bodies. In fact, in

recent years CEIS has been particularly active in the implementation of European research programmes such as ESPON Urban-Rural, BIO-MED, ESPRIT, LEONARDO, TMR and TSER. The centre has also hosted several research programmes sponsored by the European Science Foundation.

Post-Graduate Programs

The Centre organises eight Master programmes:

- Economics,
- Economics and Management of Health Systems,
- Economics and Management of Cultural Heritage,
- Economics and Management of Information and Communication Systems,
- Economics and Management of Sport,
- Economics and Regulation of Public Utilities,
- Economics and Management of Transportation Systems,
- Economic Development and International Cooperation.
- Economic and Development of the Environmental and the Territory

Since 1998 CEIS also organises, in conjunction with the Italian National Research Council (CNR), an International Summer School in Economics with the dual task of training young researchers and strengthening the bonds between Italian economists and the international scientific community.

Finally, since 2001, CEIS organizes, in conjunction with the International Association of Italian Economists (AIDEI), the Villa Mondragone Workshop in Economic Theory and Econometrics. The workshop is designed to stimulate the interaction between senior economists and young researchers working on a variety of economic issues, both theoretical and empirical. Its specific purpose is to offer young researchers advice and constructive criticism from more senior scholars.

Conferences

The **Villa Mondragone International Economic Seminar** is an annual conference organized by CEIS since 1989 and devoted to economic issues of important policy relevance. The topics change from year to year. The 2002 Seminar was devoted to “Institutions and Growth: The Political Economy of International Unions and the Constitution of Europe”. The Seminar represents an important opportunity for Italian and foreign scholars to meet. It also constitutes an open forum for discussing current research and initiatives undertaken by CEIS.

Another important meeting is the **International Conference on Financial Economics**, organized yearly by the CEIS with the aim of deepening the current economic policy debate by focusing on aspects of the financial world.

Another important serial meeting (2003), organized in collaboration to the Course of Economic Geography (Prof. Maria Prezioso), is a International Seminar of Urban and Regional Planning. The topic of the last meeting was “Urban-Rural relations in Europe: a Regional Typology”.

Every year CEIS also organizes an **International Conference on the Economics of Biotechnology** in conjunction with the International Consortium of Agricultural Biotechnology Research, the Centre of Sustainable Resource Development of the

University of California at Berkeley and the Economic Growth Centre of Yale University. The topic of the 6th (2002) conference was “Agricultural Biotechnology: New Avenues for Production, Consumption and Technology Transfer”.

1.2 *Short description of the Consortium*

Partnership

The partnership of ESPON 3.3 TPG, led by the CEIS “Tor Vergata”, arise from the common will, several times and in several occasions expressed, of involved countries institutional and academic representatives to cooperate in individuating and defining politics recommendations on sustainability and social cohesion.

The definition of Consortium members starts from their agreement on the need to define previous evaluation procedures useful for sustainable territorial planning informed on cohesion and integration european treats policies; on geographic/administrative specificity; on proved scientific capacity.

The consortium consists of a partnership of 5 universities. In addition 2 sub-contractors are foreseen for certain tasks.

The letters of commitment from the partners and subcontractors can be found in Annex A.

The consortium includes 1 **Contact Point** as project partner (Slovenia). The CP will guarantee a close co-operation with the Espon Coordination Unit and the Monitoring Committee. The Contact Point, moreover assures the inserting of ESPON 3.3 results in the frame of the other ESPON projects, especially 3.1 and 3.2 ones, and the creating of a virtuous interrelation with EU policies in matter.

The partners of CEIS in the consortium are:

**Partner 2 Centre of Urban and Regional Studies (CURS)
Helsinki University of Technology (HUT), Finland**

**Partner 3 Research Institute for Housing, Urban and Mobility Studies (OTB)
Technical University of Delft, Netherlands**

**Partner 4 Centre of Geographical Studies (CEG)
University of Lisbona, Portugal**

**Partner 5 Centre for Urban Development and Environmental Management
(CUDEM)
Leeds Metropolitan University, United Kingdom**

In addition 2 sub-contractors will be hired for clearly defined tasks:

Sub-contractor 1 MCRIT sl, Barcelona, Spain

(research and development of decision support systems for policy evaluation in spatial development, transport and environmental planning)

Sub-contractor 2 Società Geografica Italiana, Roma, Italia

Each member of TPG assure to reach the research topics through their specific scientific and institutional backgrounds, sharing with other colleagues Research products and personal expertise. Different contributions can be defined in terms of added value brought to project aims as following expressed:

Slovenia Contact Point declares its added value is:

1. to have a broad overview of other ESPON projects, of their development and results so far. Ability to judge which connections to other ESPON projects should be made and how
2. to be in close contact with the ESPON Co-ordination Unit and the rest of the ESPON community, which could be of importance in the overall co-ordination of the project
3. to participate actively in many other international cooperation projects, especially CEMAT and INTERREG IIB, which offer valuable experience in terms of wider European perspective, that goes beyond the European Union and includes e.g. countries of the Western Balkans. As a government institution of a new member state CP can also offer a concept of competitiveness that can differ from the concepts in the EU-15 states
5. from a methodological point of view, to extend the notion of competitiveness beyond the GDP per capita approach
6. to contribute to the development of comprehensive competitiveness indicators that would include factors like the quality of life, although they are difficult to assess in financial terms

Partner 1

CEIS added value is in terms of high expertises involved:

The CEIS president Luigi Paganetto (Dean of Economic faculty and Professor of international economics at the University of Rome “Tor Vergata”) has recently been chosen as member of the *High-level Group* on the Lisbon Strategy. This group named by Romano Prondi on april 2004, is to look into ways of injecting fresh stimulus into the Lisbon strategy, in particular by improving delivery of the objectives set and by involving Member States and stakeholders more closely. It will also be assessing the instruments and methods used so far.

The CEIS expertise is in fields to promote advanced training and research activities in economics.

Main Research topics:

- ✓ Development Economics
- ✓ European Economy
- ✓ Institutional Economics
- ✓ Economic Performances
- ✓ Capitalism and Governance
- ✓ Economic and territorial policies

The main research focus of this area is to investigate the differences in regional and national growth paths, the determinants of productivity gaps and technological divide across UE States and world regions (US versus Europe, South East Asia versus Latin America) and within the same country and the role played by institutions in shaping the growth process. Special attention is devoted to analyse the effort to build, for the European Union, institutions that will be able to foster economic growth and, at the same time, to meet the challenges of enlargement and further integration. Particular attention is also devoted to the analysis of the implementation and harmonisation of fiscal and welfare policies in Europe.

The Observatory on Economic Policies carries out research supporting quantitative and qualitative analysis of economic policies and their impacts at different territorial scales. It uses for its analysis a set of econometric tools including macro-econometric models and models for micro-simulations. The Observatory on Economic Policies publishes reports on a regular basis focusing on business cycle analysis and assessment of fiscal and monetary policies and on evaluation of the effects of institutional and structural changes on economic growth. In addition, the observatory aims to help policy makers assess the short term and long term impacts of economic reforms on growth and macroeconomic stability. Policies both at a national and European level concerning taxation, social security, public expenditure on health and welfare, research, public investments on core infrastructure and human capital, and reforms of the rules governing the markets are among some of the main issues dealt by the observatory.

Partner 2

CURS/HUT added value is in terms of high expertises involved (human resources):

Rauno Sairinen (DsocSc 2000), currently ***research director*** at the CURS, is a political scientist and sociologist who has concentrated on urban planning studies and environmental policy issues for several years. His major research themes have concerned environmental policy instruments, social impact assessment (SIA), urban planning, environmental attitudes, citizen participation and communicative planning theory and traffic policy. The main research projects of the Finnish Academy have been “The Choice and Suitability of the Environmental Policy Instruments in Finland” (1995-1996) and “The Voluntary Agreements as an Environmental Policy Instruments in Finland” (1997-1999).

Sairinen has been a research leader in several domestic and international projects. Those concern/ have concerned for example the structural (economic, social and

environmental) changes in medium sized cities around Baltic Sea countries (MECIBS/ Interreg IIIB) (2002-05), monitoring of participation practices in Finnish land-use planning (2001-03), the environmental strategies of Finnish Road Administration (1996-2000), the role of Finland in the EU's environmental policy (2000-02), new co-operation practices of general land use planning (Master Plans) in the Finnish city regions (2001-03).

Janne Roininen, M.Sc., Janne Roininen has been a researcher at the Department of Architecture and at the Centre for Urban and Regional Studies at Helsinki University of Technology since 1996. His special interest lies on evaluation studies of planning, which will also be the subject of his forthcoming PhD dissertation. He graduated from Helsinki University, Department of Geography, where he has also been a part-time lecturer on evaluation methodology. He has also participated in the teaching of planning geography at the Open University of Helsinki. Roininen has carried out research projects dealing with evaluation of urban and regional development and policies and evaluation research and methods. His current research projects are: 1) Evaluation of Innovative Actions Programme of Eastern Finland, 2) Analysis of the Finnish Regional Schemes and 3) Monitoring and Evaluation of the Planning Processes under the new Finnish Land Use and Building Act from the Collaborative and Interactive Planning Perspective. During the past years, he has carried out research projects dealing with evaluations of Finnish, Swedish as well as of EU regional and structural policy.

Kaisa Schmidt-Thomé (born in 1973) graduated (M. Sc.) in Planning Geography in 1999 and became Licentiate of Science in 2004. She has worked at CURS since 1999, first

as a member of the Finnish team in the Study Programme on European Spatial Planning, where she participated in the work on Main Trends shaping European Spatial Development, especially on the role of innovations. She has carried out research projects "ESDP and spatial planning and development in the Baltic countries" and "ESDP and urban-rural partnership - Finnish perspective". Currently she works as the ESPON Contact Point in Finland and as the assistant coordinator of the ESPON project 1.1.2 on Urban-rural relations in Europe.

Partner 3

OTB added value is:

Expertise in fields of strategic importance for the good result of project: Strategic planning, EU spatial planning, urban developments, urban economy, polycentric urban development, urban theory, EU transport policy, environmental planning

Moreover OTB Research Institute for Housing, Urban and Mobility Studies has substantial experience of relevant studies and research projects at the national and European level, including:

- *POLYCENTRIC DEVELOPMENT IN EUROPE*, funded between 2002 and 2004 under the ESPON 2002-2006 Programme (implemented in the framework of the INTERREG III Community Initiative)

- *URBAN-RURAL RELATIONSHIPS IN EUROPE*, funded between 2002 and 2004 under the ESPON 2002-2006 Programme (implemented in the framework of the INTERREG III Community Initiative)
- *SPATIAL DEVELOPMENTS AND POLICIES IN POLYCENTRIC URBAN CONFIGURATIONS IN NW EUROPE*, funded between 1998 and 2003 by Netherlands Organisations for Scientific Research.
- *SYSTEM INNOVATION URBAN AND REGIONAL LAND USE AND AREA DEVELOPMENT*, funded between 2003 and 2007 by Dutch government (50%)
- *TERRITORIAL COHESION – LOOKING FOR AN IMPLEMENTATION STRATEGY*, funded in 2003 by the Dutch Ministry of Housing,
- *MULTIPLE VISIONING – BRINGING FURTHER TRANSNATIONAL SPATIAL VISIONS*, funded in 2002 and 2003 by the Dutch Ministry of Housing, Spatial Planning and the Environment
- *TRANSNATIONAL SPATIAL VISIONS –TOWARDS AN IMPLEMENTATION STRATEGY*, funded in 2004 by the Dutch Ministry of Housing, Spatial Planning and the Environment,
- *CORRIDESIGN*, funded between 2000 and 2001 under the INTERREG IIC programme, concerning corridor developments in the North Western Metropolitan Area.
- *EURBANET*, funded between 2000 and 2001 under the INTERREG IIC programme
- *STELLA*, a thematic network funded between 2002 and 2005 under the EU’s Fifth Framework Growth Research Programme
- *TERMINET*, funded between 1997 and 2000 under the EU’s Fourth Framework Transport Research Programme
- *VPR INTERNATIONAL*, funded between 2002 and 2003 by Novem (the Netherlands Agency for Energy and the Environment
- *BEQUEST*, funded between 1998-2001 as a Concerted Action by the EC under the Fourth Framework Environment programme

Partner 4

CEG added value is the proved involvements in Research projects:

Within the three five years the **CEG** has co-ordinated and participated a large variety of projects. The funding comes from diverse sources, the most important funders having been:

- * University of Lisbon Foundation
- * Science and Technology Minister
- * European Union

List of Projects

Project name	Year of beginning
IMISCOE – International Migration, Integration and Social Cohesion in Europe, European Network	2004

of Excellence	
National Policy of Management of the Portuguese Territory (General Coord. of Jorge Gaspar)	2003
TEMPUS – MEDA PROGRAMME 2002 - Project “Methodologie de formation à l’amenagement des territoires: cas des villes”, Coord. M. MASSON VICENT, Université Joseph Fourier Grenoble I, Project N° 30096- T562 – Urban and regional Planning, MEDA 2002 Curriculum Development.	2003
“ESPON 2006 PROGRAMME –INTERREG III Community Initiative – Project “1.1.4. The spatial effects of demographic trends and migration”. Lead Partner: Centre for Regional Science (CERUM) at Umeå University, Sweden	2003
“ESPON 2006 PROGRAMME –INTERREG III Community Initiative - Project “1.1.2. Urban-rural relations in Europe”, Lead partner: Centre for Urban and Regional Studies, Helsinki University of Technology	2002
Divestment and Economic, Social and Territorial Impacts	2000
Re-inventing Portuguese Metropolis: migrants and urban governance	2001
WorTiS - Sistemas de trabalho, tempo e espaço na indústria automóvel (Work Systems, Time and Space in the Automobile Industry)	2000
Rethinking Portugal in Europe: perspectives of an peripheral country	2001
Study Programme in European Spatial Planning.	1998
MANTRA-East – Integrated Strategies for the Management of Transboundary Waters on the Eastern European Fringle – The pilot study of Lake Peipsi and its drainage basin	2001
OIKOMATRIX – Evaluation of the socio-economical impact of legal tools to control the emission of green house gases	2000
Assessment of Landslide Risk and Mitigation in Mountain Areas (ALARM)	2001
Lisbon and the management challenges face to the new economics	2001
Commercial Centres in Portugal: concepts, typologies and evolution dynamics	1999
Traditional commerce in urban context: Modernisation Dynamics and Public Policies	1999
Employment and Employability in commerce	1999

Partner 5

CUDEM added value is the proved involvement in the main topics supporting the project:

- planning, Housing and Human Geography Group and European Regional Business and Economic Development Unit. It provides a dynamic interdisciplinary environment engaged in high quality academic inquiry and policy-related research.
- spatial, environmental, governance and regeneration themes The study of urban and regional governance lies at the heart of CUDEM's research agenda which is committed to developing theoretically informed and policy relevant work on the changing nature of government and governance at all spatial scales
- development of ideas and techniques for futures planning and incorporation of sustainability; working in collaboration with local and regional agencies towards innovative ways of responding to the 'modernisation' agenda and the need for engaging local communities in policy and action.
- research in housing and social policy developing expertise has coincided with greater emphasis on evidence-based social policy making at the national and local levels.

Urban and Regional Governance

- Local and Regional Economic Regeneration
- European Spatial Policy and Planning
- The UK Planning System
- Networks, Partnerships and Policy Delivery

Sustainability and Futures

- Futures and Foresight
- Planning for Sustainable Development
- Environmental Resource Management

Housing and Social Policy

- Social Inclusion
- Urban Regeneration and Neighbourhood Management
- Housing Policy and Practice
- Children and Young People

Sub-contractor 1

MCRIT added value is:

Research, development and implementation of decision-making support systems for urban, transport and environmental policy assessment.

Mcrit research activities have focused on the development of new software technology to support open multi-software information and modeling systems driven by user-friendly fully-customised interfaces.

Mcrit systems development and implementation activities in decision-making support systems (information, modeling, evaluation and/or presentation) for a number of planning institutions at the local, regional and European scales.

Mcrit planning activities cover local and European strategic studies and engineering projects in the field of urban, regional and environmental impact of transport infrastructures. Mcrit has produced assessment reports and policy recommendations for EC/DG TREN, EC/DG REGIO, the European Investment Bank, the United Nations, CETMO and a number of national and regional administrations responsible for transport infrastructure planning and management in Europe.

Mcrit has worked in partnership with a number of European and International companies and research institutes from different countries:

- MKmetric and IWW (Germany)
- NTUA University and SYSTEMA (Greece)
- World Conservation Monitoring Centre, CETMO (International)
- ME&P and SDG (UK)
- INRETS and SOFRES (France)
- TRT and CENSIS (Italy)
- Amsterdam University and Delft University and NEA (Netherlands)
- Nordregio (Sweden)
- LT-Consultants (Finland)
- DTU University and TetraPlan (Denmark)
- Universidad Católica de Chile -Prof. Ortúzar- (Chile)
- Université de Montreal -Prof. Gaudry- (Canada)

Mcrit publications include contributions by staff members as co-editors or co-authors in a number of books and articles:

- "Catalunya cap al 2020: Visions sobre el futur del territori" (Panorama 7 Territoris. 2003)
- "Atlas ambiental de la Mediterrànea" (ICM, 2000)
- "Atlas ambiental metropolitana" (ICM, 2000)
- "Factors claus de la planificació territorial metropolitana" (ICM, 1999)
- "Medi Ambient i Governabilitat en la Mediterrànea" (ICM, 1998; Spanish version 2000)

Mcrit has also designed a number of webs, electronic and in publications for free dissemination:

- Pla Territorial Metropolità de Barcelona (GIS)
- Pla Territorial Terres de l'Ebre (GIS)
- Balanç (Multimedia, Models)
- SIMU (Multimedia)
- SIET (GIS, Multimedia, Models)
- PhareToolbox (GIS, Models)
- ESPON (Multimedia)

Sub-contractor 2

Società Geografica Italiana added value is

During the 1990s, the Italian Geographical Society collaborated on the "front line" in important research on Italian agriculture, financed by the National Research Council of Italy and the Ministry of Agricultural Policy.

The results of the research were collected in more than 20 volumes, in part published by the Italian Geographical Society, and in a lavish atlas (the first atlas on Italian agriculture), also published by the Italian Geographical Society. In this way, a still essential sector in economic, social and cultural life, but also in the use of territory, in the conservation of the environment and in the management of biodiversity, was finally analysed in the necessary detail and with an indispensable common perspective – two characters of geographical study: analysis and synthesis – producing interpretations and proposals which, rightly so, have given rise to great interest and are becoming the main points of reference in the refinement of intervention policies in agriculture.

The Italian Geographical Society's Library have approximately 300,000 volumes, the holds the most important collection of specialised documentation in Italy and one of the most significant in the world: it holds, amongst other things, more than 2000 periodicals of geographical interest, a quarter of those being "current", and obviously coming from all over the world.

The Society works in close contact with, amongst others, other associations and through them also comes into connection, for example, with schools Italian cartography, giving life to a true and proper Italian "school", which up to today has had well-deserved success.

2. Informations regarding the conditions of exclusion

The consortium led by CEIS consists of five universities, one Ministry and two private companies/consultants with evidence of stability and good financial conduct. Most of the institutions being public, state owned universities receive their basic funds from the national budget. The status of a public institute also guarantees the payment of social security fees, taxes and dues. Also the consortium members and subcontractors from institutions with another kind of status have proven efficient and reliable. Extensive additional information and various certificates are provided in the Annexes of each partner and subcontractor. Neither the lead partner CEIS, nor one of the other partners of the consortium nor the subcontractors are in a situations that could lead to exclusion as listed under point 12 of the restricted call for tender (see Declaration on Conflict of Interests).

4. INFORMATION REGARDING AWARD CRITERIA

4.1 Knowledge of regional policy and the European Spatial Development Perspective and of the question of territorial development in the context of the Community territory

Research knowledge in the field of regional policy, European spatial development policy and territorial trends in the context of the community territory; level of expertise of the tenderer, experience of similar services, etc.

By the Lisbona (2000), Nizza (2000), Göteborg (2001) agreements, as well as by the draft text of the new Constitution, the European Union faces the topic of the allargement, also through the adoption of instruments and common procedures, from 1999 more flexible by the Amsterdam Treaty.

The full subsidiarity for making a sustainable Europe in front of citizenships and institutions, and the "proximity" (Committee of the Regions, 2000 and 2002; III Cohesion Report, 2004), are the principles able to support (not to refrain) the action of the local authorities within limits sets up from the sustainable principles (Laeken Declaration, 2003).

The numerous suggestions and invites to changing and structural innovation in this direction have evidenced, above all in the Göteborg meeting, the necessity to predispose political-organized models useful to the States and regions integration. The thesis finds foundation also in Italy, above all in within studies and experimentations involving geopolitical and geoeconomic contributions in matter of economic-territorial planning for the federalism.

The Union highlighted some cleaner differences inside (ESPON Program 2002-2004; Prezioso, 2004), starting that also NUTs 3, beyond to the regions and cities, are independent units of reference for planning and sustainable development in the competitive arena. In fact, if they are not political areas, they are administrative zones, constituting the local socio-spatial condition through which communities manifest themselves, their local development and social cohesion, beyond the cultural divisions and the dominant strategic economic models.

This knowledge is the base of the vision that some NUTs carry in Europe today. Asserting the existence of a geographic type between State and regions (as in the case of Italy, Germany, Austria, Belgium, Czech and Slovak Republics, Slovenia, etc.) is the possible base of the new structural and economic European polity (Structural Funds new vision, in III Cohesion report 2004), able to manage the transition from a city vision to a territorial one, in relation to the crescent strategic weight attributed to: a) the borderland areas/regions in the political-territorial assessment that the Union makes of the sustainable development in the short period; b) the not traditionally understanding regions, that represent a new and innovative organization of metropolitan city/area; c) the areas of a new geography for the European integration, that oppose to the peripheral/core theorem a model of integrated and cohesive, 'bottom up', equipotential, polynuclear development.

Inserting the topic of integration (both vertical and horizontal concentration of proximity) in a systemic and complex vision, the project will inquire on the territorial assumption (by case studies) of all the stages that allow the sustainable qualification of the spaces,

coordinating them towards an only aim by institutional governance and the use of appropriate instruments that regulate the behaviors of the private and public actors. This formulation is found again also in the most recent governmental and enterprise strategies (Multistakeholder CSR Forum, 2001; European Commission and Italian Welfare and Job Ministry, 2003), that can more usefully orient the laws regarding both the sustainable development and the welfare in the competitiveness (Prezioso, 2003a), into the geographical pictures of the national, regional and local diversities of the new Europe. The topic is not still studied so that it is reached more to a new and balanced behavior in the complex of the territorial government - therefore to give new external economies of scale to the multitude of institutions that take part into European development -. The project will look at the formula suggested in Europe from the so-called "Renanian Capitalism" experience -, but will be based on the new and fundamental role that the European Public and Private Institutions can play for the flood and diffuse participation of the enterprises to the competitive model, applied an experimental approach to define the development, so-called Sustainable Territorial Management (STeM Approach by Prezioso 2003).

Competitive territorial structures and cooperative multilevel programmes: new conditions of the environmental partnership in Europe

The debate about the cohesion policies' reform after the 2006 shows as the greater part of the European institutions supports the UE participation to favour the entire communitarian territory, offering a wide support to the centralized action on strategic topics: knowledge society's innovation and development, employment, social cohesion, sustainable development, competitiveness' improvement for the social and economic re-development; concentrating the investments on the less favourite regions of the new member-states. The communitarian structural instruments offer a lot of possibilities in order to overwhelm the regional differences, tying them to a policy of deep financing tout-court and a philosophy of the structural funds, to promote subsidiarity and governance. The private public/partnership, the medium-term programming linked to a careful analysis of the regional potentialities, the decentralized management and the exchange of the best practice guarantees the effectiveness of the European strategies, supplying flexible answers in function of the regional necessities.

The full coherence with dictates of Lisbon (2000) allows that European Union points to catch up, within 2010, "an economy based on the more competitive and dynamics economy", full employment, equipping itself of a method "of open coordination"; where the economic and social increase becomes a fly for a sustainable policy of cohesion towards integration of the environmental dimension (Council of Göteborg, 2001).

However, the structural investments still need to define the real territorial context of the sustainable development inside which allotting itself, even if the Commission has pushed, since years ' 80, to the collaboration within regional networks for the exchange of good practice above all of transborder cooperation and cohesion (Interreg III, Urban II, Equal and Leader plus).

The regional competitiveness promoted by the cooperation has favorite strong progresses in economic and social field, strengthening the social cohesion, contributing in meaningful way to improve the quality of life into peripheral and less favourite regions.

In such regions, some territorial factors slow down the development, for example the distance from the principal central and advanced areas, the persisting of elevated unemployment rates, the disadvantages of natural character, etc.; they transform the regions in place where build new and necessary proximities, to strengthen borderlaine participations, coordinated to the already existing instruments of cooperation (Interreg, Phare, Tacis, Cards and Meda).

The UE allargemente has emphasized the differences in matter of economic development, redefining the geographic borders of the disparities and the employment disadvantages.

The new cohesive policity has an unquestionable impact on the structural planning instruments, that guarantee political and economic integration, developing, for example, some infrastructural networks and the institutional abilities in matter of political thinking and performance, cultural heritage assessment, transparency and exchange of best practices to favour the institutional subsidiary governance.

Research experience within the precise terms of reference, including insight in relevant spatial structures and territorial trends in candidate countries and neighbouring countries; level of expertise of the tenderer, experience of similar services, etc.

The proposed project consortium represents very well the expertise required in carrying out the project of the ESPON Programme. All partners of the consortium have been involved either in the making of the European territorial approach and regional development policies. All partener have also experience in territorial competitiveness. In the following some examples of the key projects and publications can be mentioned:

Examples of projects:

- CEIS 1999, ESF/SCSSEsploratory workshop scheme, Aging population and technological advancements in health outcomes and new challenges for European policy makers, commissioned by European Science Foundation
- CEIS 1999-2001 Structural Funds Objective 1 (1994-99) Project 2 – Action 2.1“Pilot Project for the update of urban-technical and economical-programming tools” in association with Ecosfera and Censis, commissioned by Italian Infrastructural Ministry
- CEIS 2002-2003, Sustainable Territorial Marketing Plan of Rome Province, Territorial Program to define guidelines for management of local economic development and the metropolitan polynuclear model, commissioned by Rome Province
- CEIS 2002, Information Society Technologies, DIECOFIS- Development of a system of indicators on competitiveness and fiscal impact on enterprises performance, commissioned by European Commision – Bruxelles
- CEIS 2002, Quality of life, The dynamics of income, health and inequality over the life cycle committed by European Commision – Bruxelles
- CEIS 2004 Metropolitan Central Place in Rome Municipality , Urban Project for Environmental Strategic Assessment in application of DIR. CEE/42/2001 for the Urban Local Sustainable Development, committed by Rome Municipality
- CURS Evaluation of the Innovative actions –programme in Eastern Finland (2003-2004, Regional Council of North Carelia)
- CURS Review of research on Finnish Spatial Development (2002; Finnish National Fund for Research and Development)
- CURS Information technology in the everyday life of the urban citizens – environmental perspective (2001-2003; Ministry of Environment)

- CURS Children's Participation in Planning – interactive applications in the web (1998-2003; Academy of Finland)
CURS The City in Your Pocket: Birth of the Mobile Information Society (1998-1999; Nokia Mobile Phones)
- CEG: coordination of EUNIT- European Network on Industry, Innovation and Territory
- Simin Davoudi/CUDEM: ESPRIN - the European Spatial Planning Research Institute' Network (DG Regio)
- OTB: lead partner in Interreg IIC projects URBANET and CORRIDESIGN OTB POLYCENTRIC DEVELOPMENT IN EUROPE, funded between 2002 and 2004 under the ESPON 2002-2006 Programme (implemented in the framework of the INTERREG III Community Initiative), concerning the implications of polycentric development for spatial policy. OTB Research Institute for Housing, Urban and Mobility Studies is one of 5 main partners.
- OTB SPATIAL DEVELOPMENTS AND POLICIES IN POLYCENTRIC URBAN CONFIGURATIONS IN NW EUROPE, funded between 1998 and 2003 by Netherlands Organisations for Scientific Research.
- OTB SYSTEM INNOVATION URBAN AND REGIONAL LAND USE AND AREA DEVELOPMENT, funded between 2003 and 2007 by Dutch government (50%) concerning amongst others synergy in urban networks and challenges for strategic spatial planning.
- OTB TERRITORIAL COHESION – LOOKING FOR AN IMPLEMENTATION STRATEGY, funded in 2003 by the Dutch Ministry of Housing, Spatial Planning and the Environment, concerning a possible contents for the concept of territorial cohesion and strategy. The project was carried out in co-operation with Ecorys-NEI. OTB was the main partner.
- OTB MULTIPLE VISIONING – BRINGING FURTHER TRANSNATIONAL SPATIAL VISIONS, funded in 2002 and 2003 by the Dutch Ministry of Housing, Spatial Planning and the Environment, concerning an analysis of strengths and weaknesses of transnational visioning processes..
- OTB RANSNATIONAL SPATIAL VISIONS –TOWARDS AN IMPLEMENTATION STRATEGY, funded in 2004 by the Dutch Ministry of Housing, Spatial Planning and the Environment, concerning a continuation of the Multiple Visioning project.
- OTB CORRIDESIGN, funded between 2000 and 2001 under the INTERREG IIC programme, concerning corridor developments in the North Western Metropolitan Area. OTB Research Institute for Housing, Urban and Mobility Studies acted as lead partner. Total value of the project.
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- CEG - OIKOMATRIX – Evaluation of the socio-economical impact of legal tools to control the emission of green house gases, commissioned by Ministry of Science and Technology (FCT), 2000
- CUDEM - 2004-06: Geoland, CUDEM is partner working on spatial analysis / observatory (FP6 Integrated Project, finalising contract negotiations),
- CUDEM -2002-04 ESPON 1.1.1: Work package leader,
- CUDEM -2002-04 ESPON 1.1.2: Work package leader,

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- Paganetto, Istituzioni e governo dell'economia, Il Mulino, Bologna, 1999
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4.1 Technical quality of the tender in relation to the services required

Description of a few suggestion of concepts, methodology and data to be analysed or used by the tender, if successful, and the problems each of these suggestions may pose, in relation to the scale of the territory to be covered. The project will bring about tangible and innovative results, is of a complementary character and will not duplicate existing work but build on ESPON results.

The project aims to analyze the new programming period of the Structural Funds, and how it will be able to delineate the strengthening of the cooperation, through the development of common programs and territorial plans. The acceptance and the sharing of common rules between partner coming from different countries and regions, the adoption of a multi-level and multi-sector approach, a large participation of the private and public actors, the exchange of good experiences and practices, the development of a systematic dialogue between the territorial actors are the base of the study. Particulary, the project will analyze the procedures that concur to strengthened the link between cooperation and the Structural Funds Mainstream, both for allowing the regions to insert the cooperation

inside of the regional development programs, and for being able to realize real plans to develop material and immaterial networks supporting the improvement of regional competitiveness, especially of less favourite ones. From this point of view some crucial points have to be considered and studied in depth:

Structural Funds and sustainable regional development: a measure of the UE territorial competitiveness's contribution

The 2000-2006 European financings of programming documents (e.g. in italian objective 2 regions) and the operative plans (e.g. in italian objective 1 regions) have already been engaged with different modalities and times in the various european regions since two years from the aims of the VI UE Framework.

In the field of productive activities - that represent the triggering factors for local territorial development (industry, handicraft, business, tourism, technological innovation, industrial search and advanced services to the enterprises) - have been activated investments and projects for the territorial restructuring: infrastructures to support cultural goods development, tourism and business; projects for the traditional and transitional productive areas; infrastructures for the social transports, services and employment services, information society.

The activated investments are various in the European regions, but the objective is common – over the infrastructural demanded for the less favourite zones - to gain the challenge of the European competitiveness, creating the favourable conditions and environment to the birth and the development of the local identities, cultural heritage, local enterprises, heading for the control of the environmental risk factors, the quality of the products and the processes, not forgetting the territorial sustainable development. So that the European regional development policy doesn't kind any localisms, it needs to look at the endogenous competitiveness factors, stressing the use of the technological innovation and the environmental certifications (UNI EN ISO 14000).

In the communication Com. 2003 n.26, the European Commission characterized and evidenced the main measures that the European Union will have to adopt in order to improve the competitiveness of the local productive systems and the SMF. Particularly, the small firms will have to act on international markets considering the happened enlargement (10 new countries):

- to intensify the exchange of the best practices;
- to instill in the young people the entrepreneurial spirit (spin-off);
- to create one entrepreneurial culture in the new income countries;
- to place the small and medium firms development in pool position every UE policy.

The project purpose to inquire state of art in old and new countries (particularly objective 1 countries), in order to comprise like and if it is possible to promote a local “bottom-up” development that watches to a “global” competition through the communitarian financial instruments for the regional enterprise competitive development (FESR).

The project places evidences like the enterprise *value line* (Porter, 1986, 1990 and 1998) can be assimilated to a interdependence system and such planned on the base of the principles orienting European politics. The grip relation that links competitiveness and environment cannot be limited to single concurrent enterprise in a general market, but it extends to the territory, that supports and delimits the dominion of activities that the firm carries out to compete in a determined productive sector (Prezioso, 2000).

ICT and regional divergences for development

Today, the Information and Communication Economy and the connected technologies are considered more and more a positive development engine. Analyzing the ICT impacts in relation to its potentialities in supporting and favouring the territorial development, emerges a wide typological variety of use, access, production, technologies between different territories. These differences are found between customers when income, instruction, sex and nationalities are different, but it is particularly important between developed and less developed regions (Zook, 2000) generating the so-called *digital divide*. According to this vision, the European situation is not homogenous, neither of unambiguous interpretation analyzing both the upgrades benefits by the new computer technologies and the risks connected with their use in a sustainable territorial development vision.

Looking at indirect effects and productive gain deriving from the use of these technologies, low developed regions appear in a unfavourable position, starting from the issue of the network access. While the technological change is making the network access and the computer use more and more cheap for the populations of the more developed regions, the service is decidedly more expensive for the populations of less developed regions.

Physical access is the first, but not unique, constraint to successful and spread of the new technologies. The clue comes from the Internet low rate use in less developed regions, also where the physical access is available (Pigato, 2001). The access is bound rather with the high costs (it's necessary to hold a computer), from the contents inadequacy (as example the lack of contents in the local language), from the lack of familiarity with the means (Nanthikesan, 2000) and from a not really dynamic institutional atmosphere. Moving the attention to relationships between the various regions it is to consider an ulterior element: technologies (alias knowledge) transfer and its eventual protection. If we are looking to the relationship between regions with different development degrees it must be point out the so-called Intellectual Property Rights (IPRs), whose adoption has been strongly wanted during the last decade from many developed regions through bilateral, regional and multilateral (TRIPs Agreements) actions.

A such regulation has opened a burning debate between who thinks that could born a distributive conflict between North (knowledge innovator and producer) and South (knowledge and technology consumer) and who, instead, considering the possibility that all the regions become also innovation producers sooner or later, thinks useful for the today less developed regions protect the own future innovations. If one looks instead to the relationship between regions with similar degrees of development the ICT supplying more grip cooperation opportunities stimulates the mutual learning and they concur to realize economies of scale thanks to common investments.

However, if in the past the cooperation asked, in substantially necessary way, that there was also a geographic proximity, so the collaboration naturally carried to constitute regional and countries groups, today the information and knowledge economy alters proximity and distance concept: in place of the geographic distance it's relevant how much cohesion is there between regions in terms of development level, professional capabilities, social integration and participation.

The Corporate Social Responsibility role in the sustainable development process

In the last years, the social responsibility topic has been studied and discussed, above all in European Union, starting up the Lisbona and Nizza conferences in 2000. Thanks to the

initiatives of the European Council, UE found in the *Corporate Social Responsibility* (CSR) a useful instrument for the achievement of cohesion and sustainable development. Particularly, the interest demonstrated from the European Council has been concretized with the drawing up, on July 2001, of the Green Book "To promote an European framework for the enterprises social responsibility" (COM 2001/366) with the aim to centralize the dichotomic debate between ethics and economy on the topic of the enterprises social responsibility. The Green Book defines the CSR as "the integration on voluntary base of the social and environmental problems of the enterprises in their business activities and relations with the others subjects".

Therefore, the social responsibility is a determining factor to concur, within 2010, the already cited strategic aim fixed by the European Council of Lisbon: "to make the (European) knowledge economy more competitive and dynamic than world, able of sustainable economic increase accompanied from a quantitative and qualitative employment improvement and from a greater social cohesion".

From a surveying carried out by the European Commission, it is emerged that, for many stakeholders, an enterprises ethically responsible behaviour is the only condition to obtain a "social acknowledgment", concurring to obtain a durable business successful with the enterprises that have invested in the social responsibility.

The Small and Medium Firms (SMF), are also aware that can contribute to the sustainable development managing their operations in such way to strengthen the economic increase and their competitiveness without to damage the environment, without to escape from the own social responsibilities and to neglect the interests of the consumers, catching up therefore a durable competitive advantage.

The topic of the CSR, and more generally of Social Responsibility, therefore, is strongly integrated to the process of sustainable development. But it is necessary to characterize some guide-lines in order to guarantee the coherence of the social responsibility with the principles that control sustainable development.

In fact, ethical principles as subsidiarity, cohesion and integration constitute valid support instruments for the communitarian political development and inspiration sources towards innovation, improvement of the employment quality, safety of the workers and workplaces, integration of social and economic development, transfer of best practices and mainstreaming policies (Communication by European Commission to the enterprises social responsibility, Brussels, 2.7.2002, 347 Com 2002 Def.).

In conclusion, there is an increasing attention to the topic of the Social Responsibility both in addresses supplied to European level, and in requirements of citizens and enterprises, but only relegated to business field. So seems right the hypothesis of a (re)interpretation in a territorial key of the Corporate Social Responsibility to transform it in Territorial Social Responsibility highlight the relationship with an . approach of sustainable territorial planning. This approach (STeM Approach, Prezioso 2003), based on concepts as strategic environmental assessment, territorial governance and territorial marketing takes on various scales and questions that come from a territory, particularly looking at the effects that policies and programs have on territorial actors.

Reinforcing european human resources to assure social cohesion: education and employment

An overview on European labour market of next years shows that inherent statistical data need to be taken into account in defining policies recommendations. The picture of UE we

are facing (by 2025) is a scenery of population composed most of all by over aged 50 and 65, with higher level in Italy, Germany, Austria, Greece and Spain.

This trend necessary involve a widespread decline in working-age population accompanied by a marked shift in age composition, so that population aged 50 to 64, many of whom are no longer working, will account for a growing share and young people coming into the labour market for a declining one¹. In the following few years, working-age populations will begin falling everywhere apart from Cyprus.

From a certain point of view, to face this situation it becomes necessary, both economically and socially, to increase long time employment (for instance reducing early retiring and enforcing older people training); from the other it becomes essential to invest more widely in physical and human capital, in innovation and ICT to boost education, productivity and employment.

By the fact it's not possible to increase younger population in short term, the stability among people age bands, in order to assure individual primary needs to be satisfy, will be obtained by achieving a high level of employment in future years, supported by economic growth. This is the solution even to avoid the arising of social tensions in a scenery that sees young people working to support older population in ratio of 1 to 4 and, by 2025, of 1 to 3.

We even have not to ignore that a wide disparities in output, productivity and employment persist between countries and regions, so previous situation will have to exacerbate more firmly in such perypheric regions already disadvantaged.

Social cohesion so meant, must be obtained both in vertical than horizontal direction, including different age classes and different regional origin of population: people need to be able to access education and training, and in consequence employment, in order to develop their capabilities wherever they live **equally**.

Strengthening regional competitiveness throughout the Union and helping people to fulfil their capabilities will boost the growth potential of the EU economy to the common benefit of all population. Securing a more balanced spread of economic activity will reduce the risk of bottlenecks as growth occurs and lessen possibility of inflationary pressure to cause a premature stop of growth. It will equally make it easier to sustain the European model of society and to cope with the growing number of people above retirement age consequently maintaining social cohesion.

In order to prevent unemployment (and support the integration of the unemployed into work too), there is a need to offer personalised services to job seekers in the form of guidance, training and new job opportunities. The '**Education and Training 2010**' programme tries to answer this requirement. It must even be stressed that in the accession countries skills obtained from further education and initial vocational training are not necessarily in line with labour market needs and curricula and teaching structures are not well adapted to the modern economy: it have especially to be taken into consideration in a revision more focused of European education system.

A high level of education and the provision of a high standard of training, which is accessible to people throughout their working lives, are key to strengthening innovative

¹ By 2025, those aged 50 to 64 will account for 35% of population of working age in the EU15 as against 26% in 2000. In Italy, the share will rise to 40% and in Germany, Austria, Greece and Spain, to 36–37%.

In the accession countries, the increase is projected to be smaller but still significant, the average share rising from around 26% to some 31%, but to 34% in the Czech Republic and 36% in Slovenia (Third Social Cohesion report).

capacity throughout the EU and to the attainment of the Lisbon objective of making the Union the most dynamic knowledge-based economy in the world.

Education and employment can be reinforced even through the wider recourse and diffusion of new technologies, in the form of e-learning and working from home for instance. This is tightly connected to infrastructural endowment and connection costs (that seems to be becoming more accessible in short terms by the **eEurope** programme that provides competition in internet access services and diffused use of e-government, e-learning, e-business and e-health by 2005), so as basic educational of PC use. The example of last years United States economic and production growth due to ICT larger use seems to encourage this kind of politics in EU too and seems to be the key factor of economic recovery and competitiveness.

Starting from the territorial competitiveness vision that emerged from the previous points, the aims of “Territorial dimension of the Lisbon/Gothenburg Process” Project proposed is:

- to understand interrelation dynamics of the different competitiveness elements
- to offer an easy scheme of all elements must be taken into consideration in order to define the measuring indicators
- to produce a schematic grid of all elements useful to select, develop, improve (qualitatively) and up to date structural indicators, in accordance with the need of flexibility and stability of the list emerged in the Communication of October 2003²
- to improve strategic guidelines to programme structural funds
- to make easier to present policy messages to the Member States and to propose reference parameters for acceding and candidate countries

To reach the aim the research will be divided between six work-packages, which are:

WP1: Concepts and definitions of competitiveness in the international framework

WP2: Individuation and measure of synthesis indicators

WP3: Check of synthesis indicators and sectoral policies through case studies

WP4: Geographical Information System and Mapping

WP5: Policy recommendations

WP6: Managing and coordination

WP1	Provides an updated definition of competitiveness sprung up from international comparisons and from the strategy deriving from Lisbon and Gothenburg meetings. It must take into consideration each target focused with a medium-long term vision to allow a facilitated three-yearly agreement of the Commission.
WP2	Studies of all structural indicators individuate in the past 3 years, their increase and complication, the Eurostat updating till the process of simplifying that carried to the individuation of 14's short list; defines few territorial macro-indicators able for a monitoring of territorial trends and impacts in relation to the Lisbon/Gothenburg strategy; collects data for the macro-indicators construction; individuates a common measure of synthesis structural indicators individuated.
WP3	In this work package each project partner involved will test the efficiency of new

² Communication of the European Communities – Structural indicators, Brussels, 8.10.2003 COM(2003) 585 final

	<p>synthesis indicators and their measure in the respective origin countries and will assess the territorial impacts of different sectoral policies relevant for implementing the Lisbon/Gothenburg strategy. The result of this test could give rise to a confirm of the guidelines proposed, to a revision or to an improvement of them. This is the moment in which synthesis indicators, and their further specification, are definitively individuate.</p>
WP4	<p>Creation of a Geographical Information System (continuously updating) to calculate the macro-indicators and the relationships between themselves and to produce thematic maps (of the whole european area) as support for policy makings. In this phase is realized too a web site to diffuse data and information about the project.</p>
WP5	<p>Provides recommendations concerning policies and defines proper instruments that may ensure a positive contribution from a territorial dimension in carrying through the Lisbon/Gothenburg strategy</p>
WP6	<p>Scientific and technical managing and coordination serves to insert ESPON 3.3 results in the frame of other ESPON projects, especially 2.3.1, 2.3.2, 3.1 and 3.2 ones, and to create a virtuous interrelation with EU policies in matter.</p>

Description of the data sources and qualitative information sources, which the tenderer intends to exploit, and description of the investigation work to be carried out in order to establish a list of additional data to be analysed and collected for the ESPON Database. The project should address the EU area of 25 Member States plus Bulgaria and Romania, Norway and Switzerland as a general rule (exceptions must be seriously motivated).

WP1: Concepts and definitions of competitiveness in the international framework

This work-package provides an updated definition of competitiveness sprung up from international comparisons and from the strategy deriving from Lisbon and Gothenburg councils. It must take into consideration each target focused with a medium-long term vision to allow a facilitated three-yearly agreement of the Commission

Aims and objectives

According to the guidelines of the Lisbon/Gothenburg strategy, in this work-package will be compared and assessed the critical contribution of the literature (including both theoretical/academic and policy/programming documents) on the theme of the territorial competitiveness, particularly those studies concerning environment as internality of the economic-territorial system useful to achievement of a competitive advantage.

The regional and national territory is not treated as undifferentiated space of the social and economic action but as physical place where receive and check the territorial capability of the competitiveness. The ESPON 3.1. project results had already shown the territory as real expression of the R&D's, innovation and education demand and supply regard to production and employment market. The territory becomes so parameter to measure virtuous solutions supporting the regional entrepreneurial structure in terms both of environmental sustainability and of improvement of cohesion and integration levels between different territorial actors (institutional and not institutional).

In this framework this work-package will analyse:

- the role of the territorial context in the international competition (cohesion and cohesive milieu) at national and regional level;
- the determining factors (as quality, governance, ICT, human capital, efficient use of resources) in improving the territorial performance and competitiveness at different geographical scales (states, regions, cities, metropolitan areas).

Suggestions of concepts and methodologies

A wide variety of forces can contribute to improve the attractiveness and competitiveness degree of a territory in relation to Lisbon/Gothenburg strategy. The main concepts are:

- continuous qualitative improvement
- cultural and social heritage valorization
- sustainable use of resources (natural, economic, human)
- preventive assessment of policies, programs and projects

The methodology used in this work package will include:

- a review and comparison of existing relevant theoretical/academic and policy/programming literature to filter out concepts and definitions
- definition and identification of key general concepts (e.g. sustainability, subsidiarity, perequazione, cohesion, institutional governance, competitiveness, flexibility, bottom-up participation)

<ul style="list-style-type: none"> - definition and identification of policy concepts linked to territorial categories (metropolitan and polycentric areas, urban, urban-rural) - definition and identification of different analysis scales (regional, trans-regional, trans-national, super-regional) - a close joint with the other ESPON project (particularly 3.2, 2.3.2, 2.3.2) in order to ensure the coherence of the definitions; - compilation of a glossary will be used both for the coordination and for the communication.
Time-table and milestones
WP-leader
Participating partners
Outputs

Description of a few suggestions of territorial indicators that should be further developed by the tenderer within the focus of the research project as well as of the assessment of the existing indicators for the Lisbon/Gothenburg strategy and of the application of the territorial indicators developed by the ESPON project 3.2 (also on the basis of ESPON core indicators) in order to make an annual monitoring of the territorial impact of the Lisbon/Gothenburg strategy feasible.

WP2: Individuation and measure of synthesis indicators

The work-package consists of 1) study of all structural indicators individuated in the past 3 years, their increase and complication, the Eurostat updating till the process of simplifying that carried to the individuation of 14's short list; 2) definition of few territorial macro-indicators able for a monitoring of territorial trends and impacts in relation to the Lisbon/Gothenburg strategy; 3) data collection for the macro-indicators construction; 4) individuation of a common measure of synthesis structural indicators individuated.

Aims and objectives

Aims and objectives to be pursued by the development of indicators and data collection are clearly stated in the terms reference. For the project team the most relevant objectives are:

- developing territorial indicators capable of identifying and measuring development trends as well as monitoring the political aim of a better balanced and polycentric EU territory; in particular identification, gathering of existing and proposition of new territorial indicators (and map-making methods) to measure and display the state, trends and impacts of Lisbon/Gothenburg strategy;
- developing tools supporting the diagnosis of principal structural difficulties as well as potentialities; in particular with regard to sustainable development;
- investigating territorial impacts of sectoral and structural policies;
- further operationalisation and territorial diversification of the policy aims and options adopted and the ESDP.

Indicators always have to refer to theoretically based concepts and models, otherwise they were arbitrary. To be useful for improving the knowledge base of EU policy making, they also need to stick to the underlying policy aims. In order to ensure these connections, work conducted in work package 2 will be closely connected to the discussions and outputs of:

- work package 1, dealing with conceptual approaches and developing a common understanding of the current economic, social and environmental trends in support of

the Lisbon/Gothenburg strategy.

- work package 3, analysing samples of regions with different potential and handicaps.
- work package 5, developing policy recommendations for EU policies to insure a positive contribution from a territorial dimension in carrying through the Lisbon/Gothenburg strategy.

On the other hand, the choice of indicators will be checked in parallel with the data availability. The study will start this check from data based covering all member states (e.g. Eurostat, EEA) and national statistical offices. This will assure that the project will not end up with a list of indicators which cannot be supplied by data and by that will ensure the short term policy relevance of the indicators. At the same time, the study serves as identification of data gaps. For mid and long term considerations it is necessary to indicate the need for additional data to be collected by European and National statistical offices. If necessary and feasible, the data base of this project will be complemented by additional national or regional data.

Consequently the main focus of this work package will be the definition of a method to measure the synthesis indicators (defined in the previous steps) starting from the “base” indicators existing and feasible and, if necessary, defining new ones.

An approach of mutual discussion and exchange between the partners of the different work packages will be followed so that intermediate outcomes and challenges of the different themes can be used as feedback in early stage of the project and can lead to adjustments of the further proceeding. Furthermore, there will be an exchange with other studies carried out on behalf of the ESPON (in particular with the ESPON project 3.2).

Suggestions of indicators

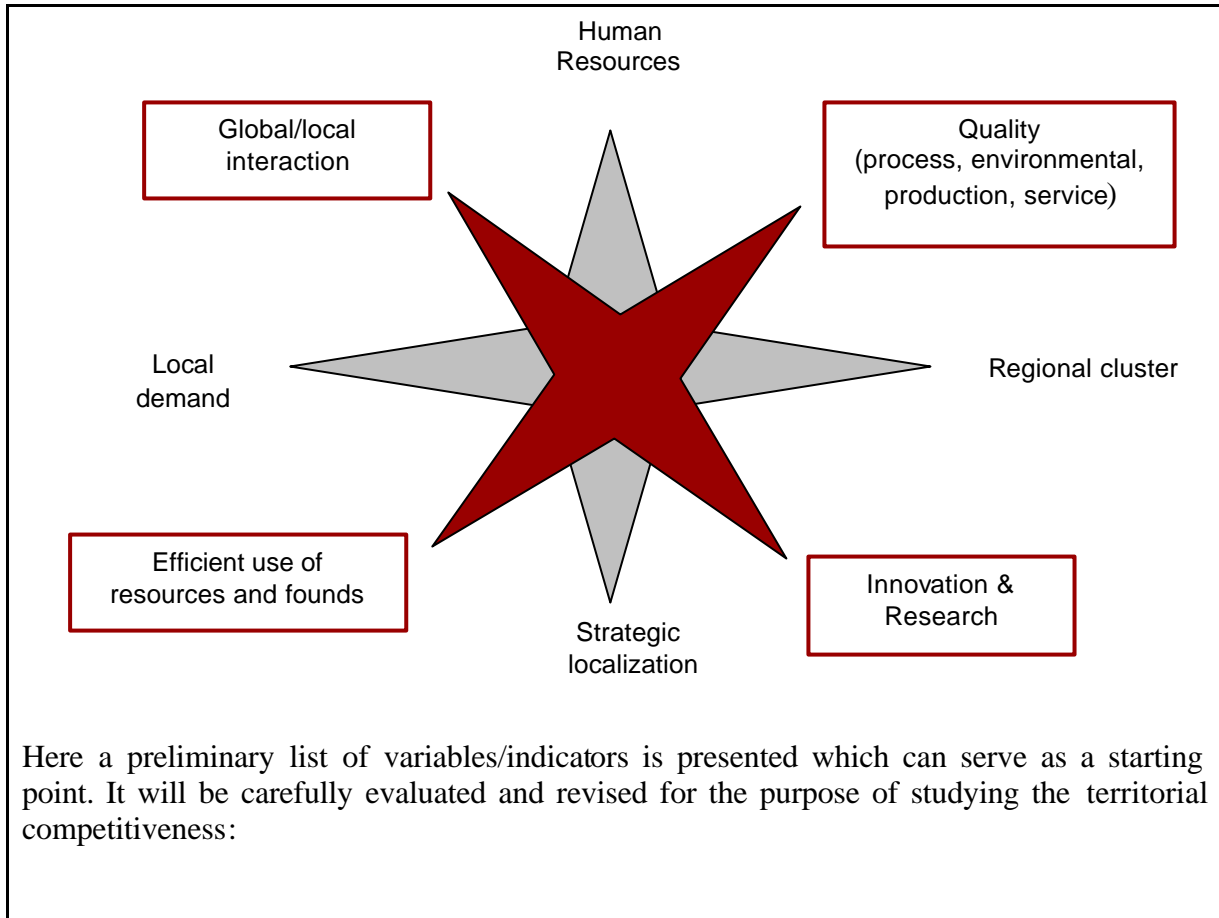
In such reference context, the research of new structural indicators able to put objectively in comparison European Member States from a territorial competitiveness viewpoint, requires a revision of the Porter’s diamond. The diamond’s model needs to be updated in accordance with actual indications from new economics and social models for a new EU respecting Lisbon 2000 and Gothenburg 2001 strategy. On this way it’s possible to insert a further star in Porter’s diamond, crossing the first, which increase interaction elements to be considered. In substitution to those elements already listed:

- Strategic localization
- Local demand
- Integration with regional *cluster*
- Human Resource

we can list:

- Global/local integration
- Quality (process, environmental, production, service ones)
- Innovation Technology
- Efficient use of resources and funds

The deriving new scheme is:



Criteria	Indicators	Variables
Innovation & Research	Knowledge and Communication Society	ICT investment, E-government, E-learning, Expenditure on human capital, Broadband internet access, R&D expenditure, patents, venture capital, e-commerce,
	Human Resources	Education (Instruction level by age and sex, life-long learning, e-learning, public expenditure)
		Employment (Unemployment long-term rate, dispersion of regional employment rate, vacancies, poverty trap, labour productivity, cost growth per labour unity, average age of retirement)
		Demography (structure by age and sex, regional GDP per capita, immigration rate)
Global/local interaction	Society	Internet users, Internet servers, immigration rate, cultural exchanges (e.g. erasmus, socrates, leonardo), travels.
	Firm Internationalization	FDI, Export/import, technological endowment, R&D expenditure, patents
	Regional cluster	Districts, local productive systems, great urban areas, big firms, insurances and banks
	Local demand and participation	Consumption of goods and services, voters, access to administrations web-site, urban requalification projects, e-government projects,
	Strategic localization	accessibility (roads, railways, airports, harbours, Internet), physical structure (geomorphology, natural resources, human resources)
Quality (process, environmental, production, service)	Life quality	Economic variables (GDP per capita, consumption per capita), demographic and social variables (death rate, dependency index, criminality, education), environmental variables (pollution, green areas, public areas), infrastructural variables (public transport, hospitals, sport facilities, cultural opportunities)
	Environmental quality	Pollution (air, water, soil), waste, energy from renewable resources, protected green area or parks, biodiversity index, ISO 14000 e EMAS certifications, SEA and EIA adoption, cultural heritage
	Job quality	Childcare facilities, ISO 18000, welfare state, work accidents
	Firm quality	ISO (9000, 14000, 18000), EMAS, customer satisfaction
Efficient use of resources and funds	Efficient use of economic resources	Use of Structural Funds (number of financing projects, distributed funds, % of co-financing), use of National Funds (number of financing projects, distributed funds, % of co-financing), planning (SEA, EIA, territorial plans and programs)
	Efficient use of natural resources	Consumption of toxic chemicals, resource productivity, recycling rate of selected materials, generation of hazardous waste, energy from renewable resources.

The relevance of indicators to be developed for Lisbon/Gothenburg strategy will be reached through close co-operation with WP1 and WP3. The work on concepts, models and typologies will give substantial guidance for the development of indicators of a high quality. To maximise the coverage of data, following data sources will be considered for exploitation. The project will rely on the following data sources:

database	source	aspects	Spatial level
REGIO	EUROSTAT	Regional statistics for all important aspects of economic and social life in the UE	NUTS III

GISCO	EUROSTAT	Geographical information ranging from topographic data to administrative regions, to be used in combination with GIS	NUTS III and below
SABE	EuroGeographic	Geographical information beyond the administrative level to be used in combination with GIS	Municipal/local level
CORINE Coordination of Information on the Environment	UNEP	Remote sensing data, land cover/land use; project: air pollution, biotopes, coastal erosion, land cover, marine environment, soil erosion/quality	NUTS III and below
INFOTERRA	UNEP, independent National Focal Centres (NFCs) in 166 countries	Decentralized world, wide network of environmental information storage and dissemination facilities	
CEDAR Central European Environmental Data Request Facility	UNEP (CEDAR is supporting UNEP-INFOTERRA and NFCs)	Environmental information and technology flow, supporting several databases prepared by remote groups	
WCMC World Conservation Monitoring Centre	UNEP	Scientific data on the world's biological diversity data management units are: <ul style="list-style-type: none"> • Threatened Plants Unit (TPU) • Species Conservation Monitoring Unit (SCMU) • Habitats Data Unit (HDU) • Protected Areas Data Unit (PADU) • Wildlife Trade Monitoring Unit (WTMU) 	
DATA NAVIGATOR	National authorities	National-based handbook with information on principal data sources, contact points, etc	to be researched (Jun 2004)
Structural funds	Objective 1, objective 2-programmes	Measuring certain indicators according to the programme's requirements, e.g. regional per capita-income, unemployment	NUTS III-level
Europe's Environmental, the Second Assessment-data service	European Environmental Agency (EEA) as central node of European Environmental Information and Observation Network (EIONET)	Environmental information on sustainable development	
OECD regional data base	OECD working group on territorial questions, data source depend on	Gathering data of member-countries, partly non-member-countries world-wide, ranging from health to social welfare	Mostly national level

	national data collections (e.g. by banks, national bureaus of statistics)		
Environmental European Spatial Data Infrastructure	EUROSTAT		
European Community Household Panel (ECHP)	EUROSTAT	Data and information about the risk of poverty	
Labour Force Survey	EUROSTAT	Data and information about total long-term unemployed and coefficient of variation of employment rates	National Level, NUTS 2
Database Eurostat	EUROSTAT/ Labour Force Survey	GDP per capita; GDP in PPS per person employed; employed person	National level
Spending on human resources	Joint Unesco/ OECD/EUROSTAT questionnaire	Date and information about public expenditure on education	to be researched
R&D	EUROSTAT questionnaire	Date and information about expenditure on research and development	to be researched
WITSA database	World Information Technology and Services Alliance (WITSA)	Information and data about: electronic commerce, Critical Information Infrastructure, Impact of IT on Developing Countries, World Trade Organization Services Negotiations	National level
EITO database	European Information Technology Observatory (EITO)	Data and studies about information and communications technology (ICT) industry in Europe. It provides the most essential and up-to-date analyses of the Western and Eastern European IT and telecommunications markets, including detailed statistics by country and by market segment.	National level
IDC database	International Data Corporation (IDC)	Expenditure on Information Technology as a percentage of GDP	National level
World Development Indicators, Millennium development Goals, Global Development Finance	World Bank	Information and selected data about development, reductions in poverty, improvements in health and education and protection of the environment	National Level
Greenhouse gases emission database	European Environmental Agency	Data and information about limit climate change and implementation of Kyoto Protocol	National level

Time-table and milestones
WP-leader
Participating partners
Outputs <ul style="list-style-type: none"> • Set of territorial indicators, focussing on the different policy aims objectives (mentioned above). • List of requirements for additional data collections (if requested) • Integrated database with statistical and GIS data, trying to achieve data coverage on all indicators and for EU member states and neighbouring countries • Contributions to interim reports

Description of the approach on samples of regions to be studied in further detail based on an investigation of the typologies of regions developed within the ESPON programme. In addition, a description of the indicators scientific tools the tenderer intends to use, including the mapping facilities and types of maps that will be made available.

WP3: Check of synthesis indicators and sectoral policies through case studies
In this work-package each project partner involved will test the efficiency of new synthesis indicators and their measure in the respective origin countries and will assess the territorial impacts of different sectoral policies relevant for implementing the Lisbon/Gothenburg strategy. The result of this test could give rise to a confirm of the guidelines proposed, to a revision or to an improvement of them. This is the moment in which synthesis indicators, and their further specification, are definitively individuate.
Aims and objectives <p>The proposed methodology will be tested on a sample of the regional typologies integrating those already developed from the ESPON projects 1.1.1 and 1.1.2 (FUA, MEGA, urban-rural typologies) and will lead to definition of a management approach of policies, programs and projects in a sustainable way. The work package is articulated on several case studies related to the different origin countries of the partners and subcontractors (Italy, Spain, Slovenia, Portugal, United Kingdom, Netherlands, Finland). This territorial range offers an exhaustive view of the regional European typologies as listed below.</p>
Suggestions of concepts and methodologies <p>ESPON project 1.1.1 identified 1595 Functional Urban Areas (FUA), with populations that overcome 50.000 inhabitants, 149 groups of Metropolitan Areas and 64 potential Metropolitan Growth Area (MEGA). Relating to the urban-rural typologies are defined in the ESPON project 1.1.2. as following:</p> <ol style="list-style-type: none"> 1. Urban, densely populated and high urban integration 2. Urban-rural, densely populated and high urban integration 3. Urban-rural, not densely populated but high urban integration 4. Urban-peripheral, not densely populated and low urban integration 5. Rural-urban, densely populated and high urban integration 6. Rural-urban, not densely populated but high urban integration 7. Rural-peripheral, not densely populated and low urban integration

- 8. Peripheral-urban, densely populated and high urban integration
- 9. Peripheral-rural, not densely populated but high urban integration

The proposed methodology starting from these definitions will integrate them with the first result of the work packages 1 and 2 defining new regional typologies. As starting point regarding to the typologies already individuated from the ESPON project 1.1.1 and 1.1.2 the territorial coverage ensured by the consortium is the following:

Spain has two large FUAs, and a balanced network of other large and medium-sized FUAs. Strongest population growth in small FUAs, while large FUAs are losing population. According to the ESPON 1.1.1 definitions we can distinguish 2 European engines (Madrid, Barcelona), 3 Potential Megas (Bilbao, Palma de Mallorca, Valencia), 1 Weak Mega (Sevilla). According to the ESPON 1.1.2 definitions we can find regions of 2,6,8,9 type.

Finland has one dominating FUA, Helsinki, and only a few medium-sized FUAs. Clear correlation between size and growth - the largest FUAs have the largest population growth. According to the ESPON 1.1.1 definitions we can distinguish 1 Strong Mega (Helsinki), 1 Weak (Torku). According to the ESPON 1.1.2 definitions we can find regions of 2,9 type.

Italy is polycentric, with three poles and large number of medium-sized and small cities. Most FUAs are losing population, only some FUAs with less than 500 000 inhabitants are growing. According to the ESPON 1.1.1 definitions we can distinguish 2 European engines (Rome, Milan), 1 Strong Mega (Turin), 2 Potential Megas (Naples, Bologna), 1 Weak Mega (Genoa). According to the ESPON 1.1.2 definitions we can find regions of 1,2,5,6,8,9 type.

The Netherlands is very polycentric. Large share of FUAs are medium-sized. Almost all FUAs are growing. Small ones relatively fastest, but also medium-sized cities are growing rapidly. According to the ESPON 1.1.1 definitions we can distinguish 1 European engines (Amsterdam), 1 Potential Mega (Rotterdam). According to the ESPON 1.1.2 definitions we can find regions of 2,9 type.

Portugal is a bipolar country, and has in addition a large number of small FUAs, most of them located near to large cities. Large cities are growing, some small FUAs are declining rapidly. According to the ESPON 1.1.1 definitions we can distinguish 1 Potential Mega (Lisbon), 1 Weak Mega (Porto). According to the ESPON 1.1.2 definitions we can find regions of 5,6,8,9 type.

Slovenia is dominated by Ljubljana. No data on FUA population development trend. According to the ESPON 1.1.1 definitions we can distinguish 1 Weak Mega (Ljubljana). According to the ESPON 1.1.2 definitions we can find regions of 9 type.

United Kingdom is strongly dominated by London, which is growing strongly. No correlation between size and population development. Data quality is poor, due to changes of statistical units. According to the ESPON 1.1.1 definitions we can distinguish 1 Global City (London), 1 Strong Mega (Manchester), 3 Potential Megas (Glasgow, Edinburgh, Birmingham), 1 Weak Mega (Portsmouth). According to the ESPON 1.1.2 definitions we can find regions of 1,2,3,6,9 type.

Time-table and milestones

WP-leader

Participating partners

Outputs

WP4: Geographical Information System and Mapping
Creation of a Geographical Information System to elaborate the macro-indicators and the relationships between them and to produce maps (of the whole European area) as support for policy makings. In this phase is realized too a web site to diffuse data and information about the project.
<p>Aims and objectives</p> <p>The application of the proposed methodology, basing on territorial analysis, prevision and assessment of the environmental impacts of the human actions, needs use of a constant and specific flow of informations. As indicators change with geographical scale (indicator field) and this last is crucial for the definition of the policies recommendations, it's necessary analyse carefully the coherence between data set and geographical scale of the study. This work is starting with the definition of the indicators needful to grant the correct representation of the economic, social and territorial trends (work packages 1,2,3) find its necessary conclusion in the construction of Geographical Information System (GIS). This tool that be come a real planning philosophy is based on the use of basic and thematic cartography and on their overlay mapping. The analysis of the correlation between the different indicators chosen become background for the diagnoses of principal structural difficulties as well as potentialities.</p>
<p>Suggestions of concepts and methodologies</p> <p>The work will be articulated in three steps:</p> <ol style="list-style-type: none"> 1) construction of the Indicators Synergy Tree; 2) realization of a GIS System Architecture; 3) insert the data in the System Architecture; <p>Starting from the Indicators Synergy Tree the work package will have as main target the definition of a Territorial Reference Framework to synthesize and cross the indicators and so become a crucial support tool for the policies definition. The work package will be end with the drawing of several thematic maps, regarding the overall Europe at different geographical scales.</p>
Time-table and milestones
WP-leader
Participating partners
Outputs

Description of the envisaged approach to recommendations that could inspire policy development at Community, national and regional/local level in support of the achievement of the Lisbon/Gothenburg objectives.

WP5: Policy recommendations
This work package provides recommendations concerning policies and defines proper instruments that may ensure a positive contribution from a territorial dimension in carrying through the Lisbon/Gothenburg strategy
<p>Aims and objectives</p> <ol style="list-style-type: none"> 1. to provide policy options for strengthening Lisbon/Gothenburg strategy with specific

reference to the structural policies of the EU concerning the post 2006 period.

- these options will be differentiated in the context of:
 - a) different types of territorial competitiveness which will be examined in the project
 - b) multiple territorial dimension (regional, inter-regional, supra-regional and trans-national)
 - c) various historical and cultural tradition as well as different institutional, procedural and administrative practices in Europe.
- these work will involve:
 - a) critical review comparison and assessment of existing policies
 - b) identification of innovative policies developments at different territorial scales
 - c) recommendations for policy options that strengthen the internal (within European territory) territorial co-operation and the external competitiveness according to the Lisbon/Gothenburg strategy to achieve a more balanced and polycentric European territory.
- the work requires close liason with other relevant projects as listed below
- 2. to provide proposals for integrated policy measures
 - these proposals will be target at improving territorial component of structural and sectoral policies in such a way that they support a more integrated and sustainable territorial development.
 - The focus will be on developing proposals for:
 - a) improvement of the current programming period of structural fund as well as inputs into the development of the post 2006 programme
 - b) articulating a territorial dimensions in future policy instruments to VI Framework Programme
 - this work involves a review and assessment of territorial dimension of structural and sectoral policies with regard to Lisbon/Gothenburg strategy. Emphasis will be placed on the relationships between cohesion (third Cohesion Report) policy and territorial development policy (aimed at a development of a competitive European territory)
 - the work requires close liason with other relevant project as listed below
- 3. to formulate policy recommendations for building effective territorial competitiveness of the European territory
 - this proposals will be differentiated for different territorial scales and will take into account the multiplicity of current institutional and administrative arrangements in Europe
 - this work will involve
 - a) critical review comparison and assessment of current institutional and administrative structures
 - b) identification of barriers and opportunities for partnerships building at different territorial scales
 - c) identification and analysis of innovative examples of co-operation between municipalities and other actors at different territorial scales
 - this work will provide inputs for the achievement of the ESPON horizontal projects under priority 3 including a framework for self assessment of policy options for improving territorial competitiveness and cohesion.

Approach to undertaking this work-package

- a combination of the following methodologies will be adopted:

- a) literature review including both academic and policy documents as well as relevant project reports
- b) selected interviews with key territorial actors at EU at national level
 - an expert workshops with professionals and practitioners will be held to test the framework for self-assessment of policy options for territorial competitiveness

Links with other relevant projects

The point of departure for this work package will be the ESDP policy options and the results of the Study Programme (SPESP). Liason with other relevant projects notably ESPON 3.2, INTERREG IIc, IIb and IIc, LEADER, Objectives 1 and 2 projects under Structural Funds as well as the work of OECD's Working Party

Suggestions of concepts and methodologies

Time-table and milestones

WP-leader

Participating partners

Outputs

Description of interaction intended for the thematic co-ordination and networking with other projects, in particular, with project 3.2 and the Coordination Unit, as well as other ESPON projects, for a coordinated approach of specific territorial policy orientations and policy options in support of Lisbon/Gothenburg Strategy

The project consortium includes two ESPON Contact Point as project partner (Finland and Slovenia). This will guarantee the close co-operation of the project team with the ESPON Coordination Unit and the Monitoring Committee. The insight into the aims and objectives of the ESPON Programme will also directly influence the quality of the project outputs concerning policy relevance. The consortium is highly motivated to discuss the future development of European Spatial policies.

One partner and one subcontractor of the project team are also contracted for the Data Navigator of ESPON, making the consortium aware of the quality and accessibility of data – a crucial issue for the development of indicators and typologies.

The most important links with other ESPON projects that will be launched at the same time are with the 2.3.1 on “Application and Effects of the ESDP in Member States” and 2.3.2 “Governance of Territorial and Urban Policies from EU to Local Level”. The links that will be established with these projects, as soon as the contracting parties have been selected, will ensure that no resources are wasted for duplicating work in the inter-related themes. It is also possible to organize common seminars or workshops for these projects, for example in connection with the meetings that are planned to be organised by the ESPON Coordination Unit for the transnational project groups.

In establishing the data base and GIS platform of the project coordination with the project 3.1 on the integrated tools is crucial. Some links already exist through the work on Data Navigator, but further consultation will be required when launching the project. The subcontractor responsible for the GIS support, Mcrit sl., is very experienced in handling European data and will provide for a platform which is in line with the common guidelines,

including the recommendations for cartographic presentations provided by the ESPON Coordination Unit.

The new European countries are represented in the project through the existing networks of the partner organizations and subcontractors (e.g. the project carried out by CURS) through the data gathered for the indicators and typologies and through the work on policy relevance and from the ESPON Contact Point (Slovenia). Experts from the new (and candidate) countries can also be invited to the project meetings and workshops in order to discuss the question of territorial sustainable competitiveness in detail.

4.2 Time management, assignment of human and financial resources to the various tasks

The project consortium being big, it has been necessary to design an efficient management structure for the project. A separate project council will be established to agree on the major decision during the work. The council consist of the work package leaders and is led by the coordinator. Other partners participate both in the scientific discussion concerning the general outline and the work done in the work-packages they have chosen to work for.

WP6: Managing and Coordination

Scientific and technical managing and coordination serves to insert ESPON 3.3 results in the frame of other ESPON projects, especially 2.3.1, 2.3.2, 3.1 and 3.2 ones, and to create a virtuous interrelation with EU policies in matter

Management includes mostly of the technical and scientific coordination of every partner. It keeps the partners in cooperation through WP leaders and represents the consortium towards the outside.

Aims and objectives

- a) to ensure the corrected cooperation between the partner;
- b) to manage the course of the work (respect of time tables, periodic reporting, final publication, finances, contracts etc.);
- c) to act as an interface between the ESPON Programme and the consortium;
- d) to manage the meetings and seminars organization;
- e) to allocate the travelling costs.

The leader of this work package will be the responsible for overall management. The coordinator, that presides this work package, will take care of the elaboration of the project outputs and will asses their quality with the other WP leaders and through periodic meetings. The coordinator will ensure the organising of the project meetings and allocates the travelling budget to the consortium members. Therefore, in addition research briefings will be sent around as the work proceeds, to inform the research and policy networks of ESPON.

A consortium contract will be signed among the project partners. The coordinator will also take care of assigning tasks to the subcontractors of the project.

Timetable and milestone

Submitting of tender	30/06/04							
Evaluation of the tenders		from 7/08/04 to 23/08/04						
Communication to winner project			08/04					
First Interim Report				10/04				
Second Interim Report					03/05			
Third Interim Report						09/05		
Final Report							03/06	
End of Project								08/06

NB: All dates assume that the project begins in August 2004. Every 6 months presentation of progress report

WP- leader

Leader partner CEIS

Partecipating partners

Work package leaders

Outputs

- Interim reports (Oct. 2004, March 2005, Sept. 2005, March 2006,)
- Financial statement
- Research briefing
- Project meetings
- Relations on targets attainment
- www-page of the project

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7. ANNEXES