— RE-THINKING TERRITORIAL COHESION IN THE EUROPEAN PLANNING CONTEXT

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Abstract

The socio-economic dimensions of cohesion have long been considered an integral part of Europeanization. However, recently a third dimension has been added to the Europe 2020 cohesion policy debate: territorial cohesion. Consequently this term is as yet undeveloped, resulting in a lack of consensus on how to define and interpret it. Such ambiguity represents a theoretical and empirical challenge to regional actors needing to respond to European Union (EU) directives while operationalizing the concept within their national and/or regional agendas. This article uses Portugal as a case study to examine how the concept of territorial cohesion is being interpreted and transposed from EU-based to territorial-based instruments and policy documents. First, we conducted a qualitative content analysis (QCA) of a selection of European and regional publications to compare their intrinsic discourses. This was followed by around 60 structured qualitative interviews, conducted with leading actors who had been instrumental in writing or implementing regional policy documents. On the basis of this dual analysis we conclude that, as a whole, the writers of the Portuguese strategic documents successfully transposed this concept, although perceptible differences exist between regions, as local actors have selectively redefined it to better suit their strategic priorities. These differences are debated with the aim of contributing to the design of effective public policies that facilitate inclusion, cohesion and Europeanization.

Introduction

For the past 30 years, the influence of European Union (EU) policy guidelines in the processes of national and regional planning of its member states has been steadily increasing. This phenomenon is described in the literature as the 'Europe effect', or Europeanization, and is deemed to have had a significant impact on the shaping of concepts, guidelines and strategic orientations of member states' public policies (Ladrech, 1994; Börzel and Risse, 2000; Cowles and Caporaso, 2001; Featherstone and Radaelli, 2003; Vink, 2003; Radaelli, 2004; Dührr *et al.*, 2007; Clark and Jones, 2008; Ladrech, 2010; Rovnyi and Bachmann, 2012; Luukkonen, 2015).

However, because Europeanization is depicted in various ways depending on the disciplinary perspective (Clark and Jones, 2008) and because the European Commission (EC) does not possess any formal instruments to regulate territorial planning at the respective national levels (Evers, 2008; Luukkonen, 2015), the perceived impact of Europeanization has not been entirely uniform (Bulmer and Radaelli, 2004). Some types of policies, such as sectorial policies in the areas of environment, transport or regional and rural development, have been more open to Europeanization than others (Ravesteijn and Evers, 2004; Dührr *et al.*, 2007). Furthermore, Europeanization has expressed itself unevenly across geographical and territorial scales. The spaces of Europeanization, as Clark and Jones (2008) define them, are heterogeneous, as they form a symbiotic relationship with each place and each policy framework therein.

Consequently, since the 1990s and the 'spatial awakening' of EU policies (Rumford, 2006; Moisio, 2011; Luukkonen, 2015), scholars have looked more closely at the implications of Europeanization on political geography and territorial planning (see reviews in Luukkonen, 2015; see also Rovnyi and Bachmann, 2012; Moisio *et al*., 2013). Indeed, as the EU gradually moved towards instituting spatial planning as an intrinsic part of its agenda (Faludi, 2007; Evers, 2008) so did the perception of Europeanization evolve from a more politically based and governance-based discourse (Pollack, 2005; Luukkonen, 2015)—what Clark and Jones (2008) called 'hegemonic state-centered integrationist vision'—to a more territorially based, socio-spatial process. According to Rovnyi and Bachmann (2012) Europeanization should be regarded as a historically contingent and socially contextualized practice, transcending narrow views on high politics to take temporally and geographically specific forms. And, as Moisio *et al*. (2013) add, there is a need, particularly in a crisis context, for a spatially sensitive contextual approach that can capture the highly variegated manifestations of 'Europeanizing' processes across these different spaces.

In this context, the introduction of the term 'territorial cohesion' into discourses around Europeanization was a natural consequence. The term, described as a means to achieve harmonious development, value diversity and complementarity, and potentiate the promotion of endogenous resources (Santinha and Marques, 2012), became associated, particularly in the 2000s, with this new paradigm of development in the European space. It gained institutional relevance through the publication of the Green Paper on Territorial Cohesion (CEC, 2008) and the signing of the Treaty of Lisbon (EU, 2009), and has since become a cornerstone of several EU publications (see, for example, Böhme *et al*., 2011) and programmes (for example, the European Spatial Planning Observation Network—ESPON). As Davoudi notes, the concept of territorial cohesion has 're-conceptualized European spatial policy by adding to it a spatial justice dimension' (Davoudi, 2007: 2).

Even so, the term 'territorial cohesion' is understandably and purposely wide and imprecise (Faludi, 2005; Davoudi, 2007; Evers, 2008). 'Like beauty, territorial cohesion is in the eye of the beholder' writes Faludi (2005: 3), while Drevet (2007) and Van Well (2012: 1550) describe it as a 'moving target' that is hard to hit and hard to grasp. In fact, the European guidelines are elusive in terms of what creating a 'cohesive territory' entails, choosing instead to debate extensively the 'why' and the 'what for' of the adoption of a territorial cohesion policy. Official national documents that have translated and reproduced these guidelines, such as the Portuguese document 'Contribution of the Portuguese Authorities for the Public Consultation of the Green Paper' (MNE, 2008), have followed a similar structure (see the analysis in Santinha and Marques, 2012). Consequently, national and regional actors face various theoretical and empirical challenges when having to interpret, transpose and operationalize the concept of territorial cohesion from the European scale to fit their national/regional agendas. And ultimately, they face the risk of not being coherent or cohesive among themselves.

Notwithstanding disciplinary, geographical and scale differences, the processual basis of the Europeanization of spatial planning in Europe displays commonalities. It is not merely a question of how knowledge and policies are passed on between hierarchical levels of governance: it concerns complex processes that may even take place outside formal structures of policymaking (Luukkonen, 2015). Europeanization should then be dynamic, actor-centred, and include an open-ended networked process (Clark and Jones, 2009). This entails disseminating and transforming local processes and practices, developing integrated discourses with common frameworks and a common vocabulary, and designing transnational cooperations characterized by mutual learning processes and the joint promotion of best practices (Radaelli, 2004; Clark and Jones, 2008; Ferrão, 2011).

Thus, it is understandable if within each country suitable conditions are being created to promote debate and exchange of knowledge and information between regional actors to generate processes of collective learning and thus a national (and European) harmonization of concepts and strategic priorities. Indeed, as Clark and Jones (2008) note, only by examining particular spatialized politics can the underlying Europeanization process be understood—namely, how actors use common knowledge about 'EUrope' and European identities to meet strategic needs and purposes (Clark and Jones, 2008). Therefore, this article, using Portugal as a case study, asks two major complementary questions: Has the concept of territorial cohesion been subjected to a faithful conceptual transposition from the European documents that leads to a somewhat common vision in national/regional policy instruments around European countries? Or has it suffered instead from a conceptual redefinition that is subject to the political and planning backgrounds of each member state or region?

The rest of the article is divided into six sections that aim to answer these two questions. In the next section, the models and concepts of Europeanization and specifically of territorial cohesion, as found in current European literature in geographical and spatial planning fields, are debated to properly contextualize and build the article's argument. In the third section, the research methodology is presented, namely, the dual approach of conducting a qualitative content analysis (QCA) of a selection of relevant policy documents, and of holding qualitative structured interviews with leading actors who are responsible for writing or implementing these documents. The fourth section contains a discussion of the European documents, while the fifth presents our analysis of the Portuguese documents as well as of our interview results. In the final section, we present our conclusions and recommendations to emphasize the extent to which territorial cohesion has gained importance within territorially based instruments and regional policy documents, and suggest what the implications may be for processes of territorial planning and policymaking on the Europe 2020 horizon.

Further understanding of Europeanization and territorial cohesion

Since the 1990s, several definitions of the term 'Europeanization' have been debated in the literature of various fields, ranging from political science to geography and spatial planning (Ladrech, 1994; Börzel and Risse, 2000; Cowles and Caporaso, 2001; Featherstone and Radaelli, 2003; Vink, 2003; Radaelli, 2004; Dühr et al., 2007; Clark and Jones, 2008; Ladrech, 2010; Rovnyi and Bachmann, 2012; Moisio et al., 2013). Radaelli (2004: 3), for example, describes it as a set of processes of change in 'domestic (national and subnational) discourse, political structures and public policies', stemming directly from the influence of the EU through the publication of new directives, regulations or standards that provide a cognitive and normative framework, and conceptual and operational guidelines. Europeanization is thus deemed a 'set of discursive practices that set boundaries for imaginations and articulations of the EU' (Moisio et al., 2013: 738) that act as a process that legitimizes the ways in which the EU strives to gain meaning, 'actorness' and international presence' (Jones and Clark, 2008).

That Europeanization is indeed occurring, and that it has long been affecting how member states conduct their internal policies, seems to be non-controversial (Börzel and Risse, 2000; Cowles and Caporaso, 2001). At the turn of the millennium, Europeanization was already being heralded as the main driver of the process of European integration (Börzel and Risse, 2000) and just over a decade later Moisio et al. (2013) highlight that numerous seemingly domestic and economic political issues have been transformed into 'all-European' matters. In fact, according to Luukkonen (2015) most studies by geography and planning experts have dealt with how the EU has Europeanized planning by orchestrating spatial policy visions, institutions and practices.

In the early 2000s, Europeanization was mostly regarded as a unidirectional reaction process to Europe (see, for example, Salgado and Woll, 2004; Giannakourou,

2005)—that is, how member states' regional planning systems have changed to accommodate EU spatial planning ideas and ideals (Rovnyi and Bachmann, 2012; Luukkonen, 2015). This was a top-down model of policy transfer and institutional adaptation, which Lenschow (2006) and Dühr *et al*. (2007) divided into three sublevels: (1) direct: EU guidelines are implemented through national institutional mechanisms; (2) less direct: institutional contexts change to accommodate new strategic interaction processes (for example, the redistribution of resources and/or powers); and (3) indirect: in which beliefs and expectations of national actors are slowly, but consistently, altered.

However, views on Europeanization have changed—on the one hand because the EU was unable to directly regulate territorial planning at the national level (Evers, 2008), but on the other hand particularly because Europeanization was being explained on the basis of social rather than political theory within the increasing literature on the geographies and spatialities of Europeanization (Clark and Jones, 2008; Rovnyi and Bachmann, 2012; Moisio *et al*., 2013). Clark and Jones (2008) have divided the different conceptualizations that emerged using three explanatory variables that they deemed to be of 'profound political-geographic importance': territory/territoriality; changing patterns of government and governance; and constellations of power. Despite the diverse processes of knowledge diffusion, the capacity for control of the EU is inherently bound by individual and hegemonic national interests, and the plethora of case-specific contexts that reconfigure the territorial bases of authority.

It is true that the EU still acts as a central catalyst for spatial planning, by guiding domestic spatial development policies through the allocation of structural funds and the publishing of regulations and reports (Luukkonen, 2015). But in so doing they have to actively mediate between the contradictory demands of EU member states aiming to solve national and trans-territorial policy problems, and the interests of the EU polity regarding a diverse range of global political spaces (Jones and Clark, 2008; Luukkonen, 2015). Consequently, the other two Europeanization models proposed by Lenschow (2006) also needed to be considered: the horizontal and the circular. The former relates to the fluxes of interaction and influence that occur between member states (for example, trans-boundary cooperation networks and interregional collaboration initiatives) without direct influence by the EU, even though they are usually facilitated by European institutions or European-funded programmes such as INTERREG or ESPON (Dühr and Nadin, 2007; Dühr *et al*., 2007). The latter refers to processes, such as the development of the European Spatial Development Perspective (ESDP) (EC, 1999; Dühr *et al*., 2007), where each member state participates in the committee for the elaboration of the core EU document (EC, 1999; Faludi, 2004) but later has to translate the strategies contained therein into its own domestic policy perspectives (Shaw and Sykes, 2003; Davoudi and Wishardt, 2005; Dühr *et al*., 2007).

Thus, Europeanization is now regarded as an interactive process stemming from a co-evolution logic between the EU and its members (Radaelli, 2004; Cotella and Janin Rivolin, 2010) or, as Major and Pomorska (2005) describe it, a dialectical relationship between the nation states and the EU as institutional entity. This entails all three of Lenschow's (2006) models: the assimilation by state actors of EU policy and political preferences; the diffusion of policy/procedural know-how and expertise between states; and the projection of national interests in supranational policies (Clark and Jones, 2008). Consequently, regulatory decision making unfolds in institutional structures that blend the national with the extra-national (Kuus, 2014) and so Europeanization should be seen not only as a response to global social transformation but also as an approach to change European institutions and governance (Clark and Jones, 2008).

The complexity of these processes adds to the heterogeneity of Europeanization across the European territory. In the recent past, several studies have shown how it varies from country to country, a consequence of different territorial conditions, governance systems and divergent interpretations of EU policies (Cowles and Caporaso, 2001;

Böhme, 2003; Buunk, 2003; Ravesteijn and Evers, 2004; Böhme and Waterhout, 2008; Clark and Jones, 2008; Luukkonen, 2015). Countries, and regions within countries, are not passive mediums. They are 'social constructs that are created in political, economic, cultural and administrative practices and discourses' (Paasi, 2001: 16), which should be understood as the outcome of networked socio-technical practices (Painter, 2010). And whereas some local spatial planning traditions, notably in north-western Europe, are deemed to strongly influence the European discourse (Rivolin and Faludi, 2005), other regions, particularly in southern Europe, are more susceptible to European influences and pressures. In Portugal, for instance, Ferrão and Mourato (2010) argue that territorial planning policies result from a mixture of several Europeanization variables, of distinct degrees of influence, that have the tendency to reinforce each other, including the various European-funded programmes, or reports such as the ESDP (EC, 1999).

    The various dimensions of Europeanization have thus penetrated the political rhetoric of national actors (Clark and Jones, 2008), often in less direct or in indirect ways—that is, somewhat 'informally' or through intergovernmental action (Böhme and Waterhout, 2008; Clark and Jones, 2008). A relevant example is the publication of the Territorial Agenda of the European Union (EC, 2007), updated in 2011 (named Territorial Agenda for the European Union 2020, or TA2020—see EC, 2011)—an evidence-based document collectively produced by the member states that, some argue, was the turning point in the development of European spatial planning (Faludi, 2009). According to Santinha (2014) the indirect Europeanization process has steadily shifted towards supporting the territorial dimension of public policies and more specifically the paradigm of territorial cohesion. Actually, the first words of TA2020 are precisely that territorial cohesion is a 'common goal for a more harmonious and balanced state of Europe' (EC, 2011), and the European Commission cohesion reports further contribute to indirectly influencing sectorial policies with territorial impact and regional policies (Santinha, 2014). Moreover, EU cohesion policy now accounts for over one third of all EU spending (Bache, 2015). As EU structural funds constitute one of the main instruments for implementing regional policy, its influence on the cognitive European agenda is also clearly discernible, and consequently also its effects on European territorial planning and the development of regions, especially those 'lagging behind' (Becker *et al.*, 2010; Mohl and Hagen, 2010).

    With the signing of the Treaty of Lisbon (EU, 2009), the publication of the Green Paper on Territorial Cohesion (CEC, 2008) and the definition of the key policy aims of the Europe 2020 strategy (Walsh, 2012), territorial cohesion became institutionalized as a term, and a major planning and political goal as a practical concept. As the Green Paper (CEC, 2008) explains, the goal of the EU strategy is to mobilize different domestic and international communities to enter into a common intersectorial discussion, even though cohesion policy should at the same time strive to be 'more flexible, more capable of adapting to the most appropriate territorial scale, more responsive to local preferences and needs and better coordinated with other policies, at all levels' (*ibid.*: 4). Therefore, while authors had already been discussing how national public policies and different territorial planning traditions were transposing several concepts and practices emerging at the European level (see, for example, Rivolin and Faludi, 2005; Knieling and Othengrafen, 2009), they now also debate how the concept of territorial cohesion itself can be transposed to national contexts, that is, how it can be 'Europeanized'. However, even the TA2020 refers to territorial cohesion as *only* a 'set of principles' (Walsh, 2012), and according to Böhme *et al.* (2011) the links between the TA2020 strategy and other policies, including cohesion policy, remain at a general, abstract level. Consequently, the transposition process becomes more elusive, which has led Faludi to remark that 'territorial cohesion' still has an unsettled future (Faludi, 2009; 2010).

    Even so, several studies in recent years have started evaluating this transposition process. Sykes (2011) investigates the 'sub-state interpretations of European territorial cohesion' in the UK context through an analysis of the documents officially submitted

as a response to the Green Paper (CEC, 2008). Luukkonen and Moilanen (2012) use the Bothnian Arc as a case study to evaluate how new soft planning spaces are visible in the conceptualizations and regional-level practices of the territorial cohesion policy, emphasizing the importance of collaborative processes yet arriving at the conclusion that these conceptualizations still lean on traditional understandings of territoriality. In a wider analysis, Van Well (2012) 'conceptualizes the logics of territorial cohesion' by comparing the community guidelines with those of the operational programmes. Regions that conceptualize the role of territorial cohesion in the cohesion policy in terms of future opportunities for sustainable development, coordination and cooperation tend to refer to 'logics of appropriateness' (Van Well, 2012), that is, they follow a top-down process (see March and Olsen, 1998). In Portugal, Santinha and Marques (2012) conducted an exploratory analysis of several strategic policy instruments to debate, at the first stage, how territorial cohesion is being integrated within national political agendas. The authors conclude that not all national interpretations are convergent, and that no explicit political measures are presented to operationalize this principle.

Yet several of the authors ask to what extent these analyses can help researchers and policymakers make sense of the numerous texts and discourses surrounding territorial cohesion (Van Well, 2012) and recognize that the debate around the clarification and operationalization of the concept, and its 'appropriation' into national contexts, has been scarce (Santinha and Marques, 2012). Further work on systematizing the concept, intervention methods at local scales, and the main indicators of territorial cohesion (based on Dao *et al.*, 2012; 2017) is thus deemed necessary.

Methodology

A literature review on the spatialities of Europeanization reveals that Europeanization is a multi-layered process that is unevenly distributed across geographical and territorial scales, as it depends on the contexts and interests of each member state. Consequently, the literature calls for research that systematizes the dimensions of the concept, and spatially sensitive contextual approaches that should help researchers and decision makers understand the dynamics behind its transposition processes—that is, how local actors act to meet their strategic needs.

This act of 'acting' is inextricably part of the meanderings of bureaucratic knowledge production, which is deemed to assume a spatial dimension because it depends on where it is produced and where it circulates (see Kuus, 2014, on how documents emerge in organizational settings such as the EU). As national actors strive to transpose knowledge and (re-)conceptualize dialectic discourses of a geopolitical nature, they face theoretical and empirical challenges related to purpose (know-how), spatiality (know-where) (Agnew, 2007) but also related to the notion of meaning. 'Acting in a context of institutions, customs and rules created by men', Silva (1988) writes, 'the actor acts in a universe full of meaning—the meaning that the values attribute to institutions, purposes and the values themselves'. Such a construct must be structured in a rational, evidence-based and comprehensive way (Guerra, 2006) and should cross all levels of social action (Silva, 1988).

In this article we use Portugal as a case study to contribute to the debate on the spatialities of Europeanization by extensively deconstructing the transposition process (from the European to the national context) for the meaning—in its various dimensions—of the term 'territorial cohesion'. For each scale of analysis (the European and the national), a set of relevant planning and strategic documents concerning the subject of territorial cohesion was selected.

For the European scale, these were the Territorial Agenda of the European Union 2020 (EC, 2011), the Green Paper on Territorial Cohesion (CEC, 2008) and the Fifth Report on Economic, Social and Territorial Cohesion (CEC, 2010). A choice was made to analyse the documents related to the previous community framework

(2007 to 2013), instead of their updated versions (for example, the Sixth Report on Economic, Social and Territorial Cohesion, CEC, 2014), because current regional plans for Portugal were approved during this earlier period. Consequently, the interpretation of the concept of territorial cohesion must stem from these, thus reflecting the degree of willingness of local actors to articulate with European policy guidelines.

At the national scale, two major sets of regional planning documents were taken into account: the Regional Land Management Plans (PROT) and the Regional Operational Programmes (POR). The PROT are regional plans of territorial management, stemming from the coherent system defined by the Portuguese Basic Law on Spatial Planning Policy and Urbanism approved in 1998, which also entails national (PNPOT) and municipal (PMOT) plans (Ferrão and Mourato, 2010). The POR are instruments of public policy that stem directly from the financial and strategic support of the Community Support Framework and the European Regional Development Fund. The analysis included six PROT, corresponding to each of the major regions of continental Portugal (North, Centre, West and Tejo Valley, Lisbon, Alentejo, and Algarve) and five POR, practically corresponding to the same territorial division (North, Centre, Lisbon, Alentejo and Algarve).

Two main analysis tools were used in the research undertaken for this article. The first was the application of a QCA to each document. This is a systematic and objective technique for analysing and quantifying the content of quantitative data (Cole, 1988; Elo and Kyngäs, 2008), long deemed quick, flexible and effective when applied to direct discourses and textual data (Bardin et al., 1979; Cavanagh, 1997). It consists of a family of analytical approaches that enhances the understanding of data by grouping words, expressions or phrases into fewer, content-related categories that share the same meaning (Cavanagh, 1997; Hsieh and Shannon, 2005; Elo and Kyngäs, 2008). The analysis was performed using NVivo, a computer software package produced by QSR International,[1] designed specifically for qualitative data analysis (see, for example, Bazeley and Jackson, 2013). In recent urban planning related research (more particularly in collaborative planning—see, for example, Faehnle and Tyrväinen, 2013) it has been used to analyse responses to interviews, debates in stakeholder meetings, or evaluations of new polices in various fields as diverse as climate change (Measham et al., 2011), public health (Allender et al., 2009), planning of urban green infrastructure (Faehnle et al., 2014) or transport and mobility (Wridt, 2010).

The QCA was divided into two parts. The first part consisted of a word count to reveal the most commonly used words in each of the documents. Initially, an unrestricted word search was performed. From the most popular results, only the words related to the research topic were kept for use in the subsequent analyses, and a new word search was conducted for these terms and their derivatives (for example, access, accessibility, accessible). The second part consisted of compiling the expressions or phrases associated with the terms 'cohesion' and 'territorial cohesion'. A text search highlighted the paragraphs in which the terms appeared, a word search within these paragraphs ranked the words found most frequently, and finally, a 'tree of words' was produced, creating a word relationship hierarchy.

The second analysis tool was a set of qualitative structured interviews conducted with the leading regional and local actors who had been involved in the writing of the two sets of national documents under interpretation. These interviews were conducted between November 2016 and January 2017 and closely followed the structural logic used for the QCA. Thus, actors were asked to evaluate the importance attributed in the writing of each plan to the principles of cohesion and territorial cohesion; and how well these plans aligned with the directives of the European documents regarding the successful implementation of cohesion policy. Three of the PROT (North, Centre and

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1   NVivo software (http://www.qsrinternational.com/products), accessed 1 February 2016.

Lisbon), although they are effectively used as guidelines in the planning process, were never actually approved by the Council of Ministers. This is the reason why actors from Lisbon did not answer the questions regarding implementation, although actors from the North and Centre did so, regardless.

A total of 32 interviews were conducted about the PROT and 33 interviews for the POR. The results of both analysis tools were then compared to reach the set of conclusions we present in the final section.

The European discourse

Three documents were selected as representative of the European discourse on territorial cohesion: the Green Paper on Territorial Cohesion (CEC, 2008), the Fifth Report on Economic, Social and Territorial Cohesion (CEC, 2010), and the Territorial Agenda of the European Union 2020 (EC, 2011). The analysis consisted of two stages: an overall assessment of the document's major goals (discussed in the first subsection below) and a Quantitative Content Analysis based on the usage of the terms 'cohesion' and 'territorial cohesion' (discussed in the second subsection below).

–   Overview of the three selected European documents

Of the three documents we analysed as part of our research, the Green Paper (CEC, 2008) is the one that most clearly attempts to clarify the concept of territorial cohesion. This is a consequence of its *raison d'être*, namely, to support better understanding of the scope of territorial cohesion and of its implications to current and future EU regional policy. The Green Paper is thus a deliberate, very specific EU document that constitutes a political approach based on a circular planning model and involved an extensive public consultation phase. The second paragraph of the Green Paper states that 'territorial cohesion is about ensuring the harmonious development of all these places and about making sure that their citizens are able to make the most of inherent features of these territories. As such, it is a means of transforming diversity into an asset that contributes to sustainable development of the entire EU' (CEC, 2008). This definition, although somewhat imprecise, is based on the principles of cooperation/ articulation between actors and policies; clustering (the creation of a critical mass by establishing networks between urban areas); and connection (access to infrastructure and services of general interest). These three Cs are more than related to the three Ds the World Bank Report identifies as key elements that influence the level of development of territories: division, density and distance (Scott, 2009; World Bank, 2009).

Unlike the Green Paper, the Territorial Agenda (EC, 2011) does not seek to clarify the meaning of the concept of territorial cohesion itself, but instead displays the double intention of reinforcing the role of territorial cohesion as a new paradigm of development in Europe and achieving greater coherence between sectorial and territorial policies. Therefore it promotes the resilience of territories within the context of a wide range of emerging or otherwise still relevant concerns common to most European countries: the deep economic crisis, depopulation of rural areas, migration, climate change, and more. The document focuses on the importance of place and of adopting a diversity paradigm through the stimuli of experimental approaches in the development and implementation of policies. It is structured around six main priority axes (EC, 2011): promotion of polycentric and balanced territorial development; encouragement of integrated development in cities, rural and specific regions; territorial integration in cross-border and transnational functional regions; ensuring global competitiveness of the regions based on strong local economies; improvement of territorial connectivity for individuals, communities and enterprises; and management and connection of ecological, landscape and cultural values of regions. Consequently, the Territorial Agenda promotes Europeanization by intergovernmental action and through a horizontal policy model.

Finally, the Fifth Report on Economic, Social and Territorial Cohesion (CEC, 2010)—the fifth instalment of a triennial EU report on the progresses of cohesion policy—was adopted in the aftermath of the worst financial and economic crisis in recent European history and was essentially designed to support the subsequent long-term recovery strategy: Europe 2020. Thus, it represents a top-down Europeanization policy model that closely follows Europe 2020's objectives of smart, inclusive and sustainable growth, while pursuing this strategy's strategic axes of innovation, employment, social inclusion and environmental awareness (Walsh, 2012). Most notably, the Fifth Report focuses on the analysis of regional disparities and how cohesion policy can have a strong impact by helping to overcome these. Another milestone of the Fifth Report is that it is the first in the series to explicitly include the dimension of territorial cohesion, most prominently in its title, even though, like the previous documents, it does not present an objective definition of the term.

–   How the European documents construe the concept of territorial cohesion

Based on our straightforward analysis in the previous section, the Green Paper, the Territorial Agenda and the Fifth Report appear to support different types of Europeanization models—namely, circular, horizontal and top-down models, respectively. Furthermore, they do not share a common unequivocal definition of the concept of territorial cohesion. Nonetheless, the QCA revealed that they share a common logic.

Initially, a striking similarity is easily observed in the number of times the terms 'cohesion' and 'territorial cohesion' appear in the Green Paper and the Territorial Agenda (46/48 times, and 36/35 times, respectively—see Table 1). The Fifth Report is a larger document that contains the word 'cohesion' an impressive 844 times, and the word 'territorial' 414 times. However, the term 'territorial cohesion' appears only 18 times. In fact, the tree of words clearly showed that, whereas in the Green Book and in the Territorial Agenda the word that is most frequently associated with 'cohesion' is 'territorial', in the Fifth Report it is 'economic'—the most relevant facet of cohesion policy in this document.

A search of the most frequent words associated with the terms 'cohesion' and 'territorial cohesion' revealed that three keywords are common to all documents:

TABLE 1   Quantitative Content Analysis (QCA) of three European documents regarding the terms 'cohesion' and 'territorial cohesion'

Document	Number of times the terms appear		Main words associated with both terms	'Territorial cohesion' achieved through:
	Cohesion	Territorial cohesion		
Green Paper (2008)	46	36	Policies; cooperation; regions; cities; rural; access; development; economic; activities; resources; social	• Cooperation/coordination between policies, government levels, institutions and territories • promoting sustainable, globally competitive cities • promoting the endogenous wealth of each territory • solving problems of social and territorial exclusion
Fifth Report on Cohesion (2010)	844	18	Policies; regions; economic; development; services; social; access	• Territorial cooperation/coordination of policies and coherence with regional development • emphasizing the role of cities and synergies between territorial areas • considering the specificities of each territory • reducing social and geographical disparities
Territorial Agenda (2011)	48	35	Policies; strategy coordination; regions; integration; local; development; different	• Coordination between policies and territorial areas, and promotion of synergies • developing a polycentric, balanced territory • promoting endogenous resources • granting equal opportunities and rights, thus balancing territorial differences

'policies', 'regions' and 'development' (see Table 1). In the Green Paper, the words we found confirm the clear association of the concept of territorial cohesion with the principles of clustering ('regions', 'resources'), connection ('access') and cooperation ('cooperation', 'policies', 'development', 'cities/rural'). The Territorial Agenda follows the same principles, emphasized by the words 'regions', 'development', 'coordination' 'local' and 'difference'. Likewise, all words found in the text search of the Fifth Report, with the exception of 'services', were also found in the Green Paper. However, relevant terms such as 'local', 'integration', 'cooperation' or 'resources' are not among those found most often in the Fifth Report, which to a certain extent reflects the lack of specificity in the definition of the concept of territorial cohesion.

Through an enhanced text search and a subsequent detailed analysis of the paragraphs in which the terms 'cohesion' and 'territorial cohesion' appeared, it was possible to clarify how each document understands the concept of territorial cohesion, and how it deems that this concept should be achieved and implemented. Perhaps unsurprisingly, all three documents share the same basic vision, summarized in the form of four major guidelines, even if they are expressed in slightly different terms (see Table 1).

First, the three documents emphasize the importance of territorial governance as a motor for institutional cooperation—be it through vertical cooperation between different governmental levels, horizontal cooperation of actors based on a holistic and shared view of the territory, or the coherence between policies and regions. The Green Paper (CEC, 2008) stresses the role of cooperation, whereas the Territorial Agenda reinforces the role of coordination (CEC, 2010), both of actors and policies, and, as the Fifth Report suggests, local (regional/national) and European agendas (CEC, 2010). According to the Green Paper (CEC, 2008) this cooperation and coordination should be achieved through flexible and adaptable institutional articulation, thus leading to optimization of the territorial impact of the sectorially and territorially based policies adopted (CEC, 2008; 2010) and a maximization of their coherence and consistency (EC, 2011).

Secondly, the three documents emphasize the importance of identifying the means for managing the territory capable of gaining critical mass to overcome differences in size, density and distance to services and amenities, as well as to support competitive gains, to develop a mobile, polycentric, balanced and competitive territory. To achieve the goal of sustainable and global cities, the Fifth Report strongly argues for the development of a functional and flexible geography (CEC, 2010) and the Territorial Agenda stresses the development of integrated functional areas, so that synergies between different territories can be maximized (EC, 2011). As is noted in the Green Paper, this should occur particularly through the promotion of an integrated development logic between urban and rural areas (CEC, 2008).

Thirdly, the three documents emphasize the need to focus on specific yet diverse interventions that take into account the potentialities, specificities and endogenous wealth of each territory, thus promoting territorially diverse policies. According to the Fifth Report, these specificities should be regarded as elements of development and differentiation (CEC, 2010). As the Green Paper states, the exploration of these distinctive features is more pressing in less developed territories, and that these areas should channel their differences to use them to their advantage (CEC, 2008). According to the Territorial Agenda, by seizing relevant opportunities, territories could become more competitive (EC, 2011).

Fourthly, all three documents emphasize the need to add to the previous guidelines the idea of solidarity and equity, thus promoting positive social and territorial discrimination, and reducing geographical and social disparities. The Territorial Agenda (EC, 2011) specifies that every citizen and every company should have equal opportunities and rights, regardless of where they reside, something that should be

promoted through mechanisms of solidarity. The Green Paper further emphasizes that these mechanisms should be implemented between the more central and developed areas and the more peripheral and weaker areas (CEC, 2008).

Consequently, it can be concluded that the European documents base the concept of territorial cohesion on four major pillars: territorial governance; territorial organization; diversity and specificity of territorial policies; and social and territorial solidarity and equity.

National discourse

The analysis of two selected national documents––the Regional Land Management Plans (PROT) and the Regional Operational Programmes (POR)—was done in two phases. In the first phase, a QCA, similar to the one for the European documents, was performed (see the two subsections that follow). In the second phase, we conducted a specific analysis related to the understanding of the term 'territorial cohesion' in each document to the four major pillars of European discourse identified above (see previous paragraph). Straightforward textual analysis is then corroborated through a series of interviews with strategic actors who were involved in the writing or implementation of each document, as previously described.

–   Understanding the Regional Land Management Plans (PROT)

The Regional Land Management Plans (PROT) are a series of instruments for territorial planning that establish regional development strategies. In 2005 they were considered crucial for the creation of a system of integration and territorial cohesion that would support the regional development agenda of Portugal. Thus, from 2006 onwards, a nationwide process of writing and publishing the various regional PROT was set in motion, promoted by each region's Coordination and Regional Development Committee. Most were published and implemented between 2008 and 2011. Six PROT for continental Portugal were analysed: PROT North (public discussion version, July 2009); PROT Center (public discussion version, May 2011); PROT West and Tejo Valley (final version, August 2009); PROT Lisbon (preliminary public discussion version, 2009); PROT Alentejo (final version, August 2010); and PROT Algarve (final version, August 2007). Different versions of these documents were used, in line with the time frame of the European documents under discussion. Preference was given to the final versions wherever these were available for this time frame.

Table 2 presents the QCA results for the six PROT, as well as the answers to the initial straightforward question we asked the actors: 'Is the principle of "Territorial Cohesion" present in the document?' The QCA shows that the term 'cohesion' is understandably much more frequent than the more specific term 'territorial cohesion', which in two cases (PROT Lisbon and PROT Algarve) is almost entirely absent from the document. Both terms are mentioned more often in the PROT from the Alentejo, Central and Northern regions of Portugal.

With an overall average of 7.6 (on a scale of 1 to 10), the interview results for the most part corroborate this assessment. PROT Alentejo (where the terms are used more often) obtained the highest average score (9); PROT Algarve (where the terms are mentioned less often) achieved one of the lowest average scores (6.8). However, the two major regions of Portugal presented an interesting contrast: PROT North had the lowest interview average (6.7) although the terms are widely used in the document, whereas PROT Lisbon had a somewhat higher average score (7.2) although the term 'territorial cohesion' appears only three times in the document.

Regardless of this there is general conceptual similarity in the use of the two expressions. Five of the six documents strongly associate the word 'cohesion' with the words 'development' and 'urban'; four associate it with 'competitiveness'; and three with 'system' and 'social'. In addition, five of the six documents associate the term 'territorial

TABLE 2 QCA and interview analysis of the six Portuguese Regional Land Management Plans (PROT), regarding the inclusion of concepts of 'cohesion' and 'territorial cohesion'

Instruments of Regional Planning:	PROT North	PROT Centre	PROT West and Tejo Valley	PROT Lisbon	PROT Alentejo	PROT Algarve
Interview average (on a scale of 1–10)						
Is the principle of 'territorial cohesion' present in the document?	6.7	8.0	8.0	7.2	9.0	6.8
QCA						
Acknowledgement of the terms 'cohesion' and 'territorial cohesion'	Ample	Ample	Moderate	Scarce	Ample	Scarce
Number of times the term 'cohesion' appears	51	52	38	27	54	22
Number of times the term 'territorial cohesion' appears	20	15	10	3	28	4
Total	71	67	48	30	82	26
Words most frequently associated with the term 'cohesion' (12 or more direct associations, except *: more than 6 direct associations)	Social; development; competitiveness; system; urban; city	Urban; centre; competitiveness; services; development; network; system	Development; competitiveness; policies; urban	Social; qualification; dynamics; activities; competitiveness; urban*	Urban; development; centre; system; economic; regional; national	Social; development; priorities; appreciation; economic*
Words most frequently associated with the term 'territorial cohesion' (4 or more direct associations, except *: more than 2, and **: more than 16 direct associations)	Cities; competitiveness; promotion; urban; development	Urban; centre; services; networks; complementary; interior; system	Strategy; policies; development; instruments; planning; quality	Urban; agricultural/forestry; communities; economic; social*	Urban; system; development; centre; economic; region; network**	Development; coast; touristic; interior; competitive; urban; promote; resources; qualification*
How the term 'territorial cohesion' is interpreted	A guiding and a strategic orientation principle (to achieve, e.g. equity and development)	A strategic orientation principle in sectorial domains (e.g. urban systems; natural resources; access to services)	A guiding and a strategic orientation principle in sectorial domains (such as urban systems; environment)	A strategic orientation principle in the agricultural/ forestry and cultural fields	A strategic orientation principle related to the urban system; a strategic objective to achieve economic and social regeneration of rural areas	A principle intrinsically linked to the concept of development and a strategic orientation principle of the territorial model
Level of relevance between territorial cohesion and economic/social cohesion	More relevant	More relevant	More relevant	Less relevant; territorial cohesion is associated with social cohesion	More relevant	As relevant, or less relevant

cohesion' with the word 'urban'; four with the word 'development'; and several with the words 'centre', 'networks', 'interior', 'system', 'competitive/competitiveness', 'promote/ promotion' and 'economic'. This similarity of associations may indicate that, for the regional actors, the concept of cohesion is already deemed to contain a territorial dimension.

As a term, 'territorial cohesion' is mostly used to represent a strategic orientation principle (a reference for the creation of new goals and measures) or otherwise as a purpose in itself. The regions that mentioned 'cohesion' and 'territorial cohesion' in their documents more often (North, Centre and Alentejo) are the ones that undeniably use them as a structuring and strategic guiding principle in their discourses (both in wider and sectorial domains). They also consider territorial cohesion more relevant than social or economic cohesion. Other PROT seem to take a more cautious approach to these new buzzwords, in terms of the number of citations within the document and the importance attributed to these. Nonetheless, they consider territorial cohesion to be an important strategic orientation principle for development in certain domains, most prominently those related to environmental and natural resources, and the urban/cultural dimension.

Also, whereas the northern and central regions strive for a notion of competitiveness and complementarity between and within urban systems, in the southern region of Algarve the focus seems to be more strongly on a strategy for development based on tourism and international promotion of endogenous resources.

–   Understanding the Regional Operational Programmes (POR)

The Regional Operational Programmes (POR) were based on the previous National Community Support Framework (QREN) between 2007 and 2013. This framework defined strategic orientations for the national transposition of economic and social European policy guidelines, namely through the application of European structural funds financed exclusively through the European Regional Development Fund. To operationalize this application, several transversal thematic and Regional Operational Programmes (the POR) were developed. The analysis in this section focuses on the five POR that cover the regions of continental Portugal: POR North, POR Centre, POR Lisbon, POR Alentejo and POR Algarve. The POR for the period from 2007 to 2013 were used instead of the most recent documents, in line with the analytical time frame chosen for this research.

Table 3 presents the QCA results for the five POR and for the interview question, 'Is the principle of "territorial cohesion" present in the document?' The QCA clearly shows that the frequency of the word 'cohesion' is much greater than the frequency of the term 'territorial cohesion'. In fact, the term 'territorial cohesion' is used surprisingly seldom (never more than 14 times), considering that the documents stem directly from the European Cohesion Policy guidelines. This is more acute in the POR of the northern and central regions, which is again surprising, as these are the regions in which the term appears most often in the PROT.

The answers to the interview question corroborate our assessment. The overall average was 6.5 (a drop in 1.1 in relation to the PROT), with the two POR that mention the term 'territorial cohesion' least often—North and Centre—having the lowest response average (6.2 and 5.5, respectively). It is noteworthy that the response average for POR Alentejo is slightly higher than for POR Lisbon (6.8 and 6.5, respectively) even though the latter uses the term twice as often than the former.

There are fewer similarities in the five POR than in the six PROT in terms of the most frequent words associated with 'cohesion' and 'territorial cohesion'. All five documents use 'cohesion' in relation to 'policy/policies'; four associate it with 'social' and 'competitiveness'; and two with 'regional'. Furthermore, four out of the five documents associate 'territorial cohesion' with 'urban' (the exception being POR Alentejo), but only two link it with 'local' (POR North and Centre); two with 'accessibility/mobility' (POR Algarve and Centre); and two with 'economy/economic' (POR Alentejo and Algarve).

TABLE 3 QCA and interview analysis of the five Regional Operational Programmes (POR), regarding the inclusion of the concepts of 'cohesion' and 'territorial cohesion'

Instruments of Regional Planning:	POR The New North	POR Plus Centre	POR Lisbon	POR InAlentejo	POR Algarve21
Interview average (on a scale of 1–10)					
Is the principle of territorial cohesion present in the document?	6.2	5.5	6.5	6.8	7.5
QCA					
Acknowledgement of the terms * 'cohesion'	Ample	Moderate	Ample	Ample	Moderate
* 'territorial cohesion'	Scarce	Scarce	Moderate	Scarce	Moderate
Number of times the term 'cohesion' appears	101	43	129	146	66
Number of times the term 'territorial cohesion' appears	6	2	14	7	12
Total	107	45	143	153	78
Words most frequently associated with the term 'cohesion' (17 or more direct associations)	Social; competitiveness; policies; regional; urban; local; economic	Policies; competitiveness; regional; evaluation	Social; policy; competitiveness	Social; competitiveness; facilities; policy; development	Social; policy; employment; appreciation
Words most frequently associated with the term 'territorial cohesion' (3 or more direct associations)	Centre; local; policies; urban	Facilities; local; mobility; transports; urban	Social; inclusion; strategy; urban; quality	Competitiveness; positioning; economy	Appreciation; network; urban; economic; accessibility; growth; endogenous; resources
How the term 'territorial cohesion' is interpreted	A strategic orientation in the fields of, e.g., environmental systems or urban conurbations	A strategic orientation principle in sectorial domains (mobility; facilities)	Associated mainly with social inclusion and as one of the dimensions of social cohesion	A strategic orientation principle in sectorial domains (mobility; facilities)	A strategic orientation principle in sectorial domains; a goal of the Territorial Appreciation and Urban Development Plan
Level of relevance between territorial cohesion and economic/social cohesion	Less relevant; although the POR promotes all three, it focuses more on social cohesion and the notion of equity	Less relevant; focuses more on social cohesion	Less relevant; focuses more on social cohesion	Less relevant; focuses more on social cohesion; refers to 'social and territorial cohesion' rather than only 'territorial cohesion'	Less relevant; focuses more on 'social cohesion' or 'social and economic cohesion'

These differences may indicate that the conceptual differentiation between the terms is clearer for the regional actors responsible for writing the POR than for the writers of the PROT.

The term 'cohesion' is, in turn, associated with cohesion policy, cohesion funds and primarily social cohesion and thus less with the territorial dimension. In fact, territorial cohesion seems less relevant within these documents than social and economic cohesion, or rather, it is considered to be a dimension of the latter. This may explain the small number of times the term 'territorial cohesion' is actually used. Where it is used, all POR (with the exception of the Lisbon POR) consider it a strategic orientation principle in sectorial domains, most notably those related to urban networks, mobility and facilities. More specifically, the North and Lisbon POR associate territorial cohesion with local and urban social strategies; the Alentejo and Algarve POR associate it with economic competitiveness and self-promotion and growth; and POR Centre associates it with a clear network logic between urban areas. These strategies aim to strengthen the goal of a more equitable social cohesion policy, common to all five documents.

–   How national documents construe the concept of territorial cohesion based on the European framework

European discourse regarding the implementation of territorial cohesion was summarized according to four major EU guidelines, namely, (1) the importance of territorial governance; (2) the importance of a proper territorial organization; (3) the importance of promoting territorially specific, yet diverse policies; and (4) the importance of social and territorial solidarity and equity.

With this in mind, two types of analysis were conducted independently and then compared across each group of national documents (the PROT and the POR). First, a straightforward textual analysis using QCA was done to identify how each document framed its response to the European framework. Secondly, a series of qualitative structured interviews were conducted with strategic regional and local actors who were involved in writing or implementing each document, to corroborate and validate the textual analysis, but also to gain insight into how, and to what extent, European discourses on territorial cohesion are mobilized by parties representing different subnational sectorial and territorial interests for their own purposes.

Table 4 summarizes both analyses for the PROT. The QCA shows that the northern and central regions of Portugal generally try to respond to all four dimensions of the European discourse, unlike their southern and Lisbon counterparts. PROT North includes all four guidelines in its narrative, and PROT Center and PROT Alentejo aim to respond to all dimensions except territorial governance. In fact, only in PROT North the notions of cohesion and territorial cohesion seem to appear in association with the notion of the importance of territorial governance. PROT West and Tejo Valley and PROT Algarve, by contrast, include only two dimensions, while PROT Lisbon mainly discusses the notion of cohesion in relation to the diversity and specificity of territorial policies.

The qualitative interviews corroborated that, overall, Portuguese actors had not been very receptive to the European guidelines. The response average to the question 'What was the importance accorded to the European guidelines when writing the document?' was only 6.1 (on a scale of 1 to 10). Once again, the Algarve actors were quite self-aware, allotting an average score of 3.5. If the four individual answers (for each dimension) are collectively considered, then the average increases to 6.3—an increase common to all PROT, except for Alentejo, where both averages were more or less equal (7.4). The PROT North actors were extremely conservative (scoring an average of 4.7 and a collective average of 5.85), although their document mentions the four dimensions, whereas the PROT Lisbon actors seem overconfident (scoring an average of 6.8 and a collective average of 7.5), considering that the respective document only mentions one of the dimensions (see Table 4—Lisbon has only one QCA box filled in, while North has four).

TABLE 4 QCA and interview analysis of the six Portuguese Regional Land Management Plans (PROT), according to how they feature the terms 'cohesion' and 'territorial cohesion' in relation to the four major guidelines of the European discourse

Instruments of Regional Planning:	PROT North	PROT Centre	PROT West and Tejo Valley	PROT Lisbon	PROT Alentejo	PROT Algarve
Importance (on a scale of 1-10) accorded to:						
The European guidelines during writing of document	4.7	7.4	6.7	6.8	7.4	3.5
Territorial governance						
In the document (QCA)	Coordination between policies and instruments	–	–	–	–	–
During writing of document	3.3	5.3	7.0	7.0	5.7	5.0
During implementation of document	2.0	3.0	4.8	–	5.4	6.0
Territorial organization						
In the document (QCA)	Strengthening of proximity networks; importance of urban areas in development	Strengthening of proximity networks; promoting a polycentric urban regional system	Strengthening of proximity networks; importance of regional urban subsystems	–	Organization of a network of supra-municipal services and facilities to promote complementarity, specialization and a polycentric urban system	Promotion of a balanced and competitive territorial model
During writing of document	7.8	9.3	8.8	7.0	9.0	7.6
During implementation of document	5.0	4.0	6.8	–	7.8	6.7
Diversity and specificity of territorial policies						
In the document (QCA)	Promotion of the resources/elements that most contribute to development	Reinforcement of the specificities that contribute to the competitive potential of each urban centre	Protection and promotion of natural, cultural and heritage resources, as well as regional identity	Requalification of the most degraded urban and non-urban spaces; building an identity based on the promotion of multiculturalism	Use of endogenous resources to enhance the economic and social regeneration of urban areas	–
During writing of document	6.5	8.3	8.2	8.3	7.7	6.6
During implementation of document	4.0	4.0	6.5	–	6.2	5.0

TABLE 4—Continued

Instruments of Regional Planning:		PROT North	PROT Centre	PROT West and Tejo Valley	PROT Lisbon	PROT Alentejo	PROT Algarve
Importance (on a scale of 1-10) accorded to:							
Social and territorial solidarity and equity	In the document (QCA)	Establishment of minimal services and facilities; equitable living conditions	Equitable service distribution	–	–	Equitable access to networks and use of ICT	Development of the most disadvantaged areas of the region
	During writing of document	5.8	8.3	7.3	7.8	6.7	6.0
	During implementation of document	4.3	4.0	6.5	–	6.4	5.7
Additional interview questions							
Evaluate the collective learning process of writing the document in terms of the territorial cohesion framework		4.0	8.6	7.0	6.8	7.9	6.2
Do you think Portuguese institutions today have greater consideration for the concept of territorial cohesion?		5.5	5.3	7.3	5.7	7.0	6.0
Do you think Portuguese institutions today have greater consideration for the major EU guidelines for the concept of territorial cohesion?		4.8	6.5	7.3	5.3	7.3	4.7

In line with our analysis of the European documents, the QCA shows that the concepts of cohesion and territorial cohesion are primarily associated with notions of diversity and specificity for building territorial identity based on the promotion of endogenous resources. Actors corroborated this assessment, evaluating the inclusion of this dimension within the documents with an average of 7.6. Only PROT Algarve does not directly answer to this dimension, and, accordingly, has the lowest average score in the interviews (6.6), alongside PROT North. The importance of territorial organization, namely through the strengthening of proximity networks at the urban scale to promote complementarity, competitiveness and development, is also present in all PROT except Lisbon's. Accordingly, this domain has the highest collective response average (8.3), while PROT Center and Alentejo scored responses above 9.0 and PROT Lisbon scoring the lowest individual average (7.0).

Furthermore, all PROT except Lisbon's and West and Tejo Valley's also stress that the territorial model needs to be balanced to promote social and territorial solidarity and equity. The collective response average for the six PROT is 6.9, but this includes response averages above 7 in the two PROT where the QCA did not highlight this dimension. Likewise, for territorial governance, PROT North had the lowest individual response average (3.3) even though it is the only PROT that incorporates this dimension, based on the QCA.

When considering the importance given to the European guidelines when implementing the document in the political and planning spheres, collective response averages for all dimensions drop. Again, the northern actors consider their implementation capacity low (the collective average for PROT North was 3.8, while PROT Center scored 3.75—the greatest drop), whereas southern actors are more confident, with collective averages around 6. PROT Lisbon was never officially approved nor implemented, hence interviewers did not respond to this question. The survey actors said that when implementing the plans they considered territorial organization dimensions (allotting an average of 6) more than the territorial governance dimensions (allotting an average of 4).

Actors allotted medium to high scores for the collective learning process of writing the document in terms of the 'territorial cohesion' framework (collective average of 6.8) with the Centre (8.6) and Alentejo regions (7.9) recording the highest scores, and PROT North the lowest (4.0). However, they allot a lower, but more consistent score for the consideration that Portuguese institutions today have for the concept of territorial cohesion (average 6.1) and of the four major EU guidelines (average 5.9). The highest average scores were allotted for PROT West and Tejo Valley (around 7.3) and the lowest average scores for PROT North.

Table 5 summarizes the analyses of the POR. The results of the qualitative interviews demonstrate that Portuguese actors are as receptive to the European guidelines as they were when writing the PROT. The response average to the question how important the European guidelines were, is 6.3 (compared to 6.1 in the PROT). Higher values were allotted for Algarve and Alentejo (above 7), in line with the QCA, as the Algarve POR mentions three and Alejento all four dimensions. When we consider the collective averages based on the four individual answers for each dimension, there is a slight decrease for Algarve, and a greater decrease for Alentejo (an average of 7.3 and a collective average of 5.1). The other three POR have averages below 6. POR North scored a higher average than the other two (5.9 and a collective average of 5.5), although it only mentions two dimensions, whereas POR Lisbon, which mentions four, has a higher collective average (5.3 and a collective average of 5.8).

The QCA shows that, overall, the five POR mainly responded to the principles of territorial organization (all POR) and territorial governance (all POR except Centre). The terms 'cohesion' and 'territorial cohesion' are strongly associated with the importance accorded to creating a polycentric urban system, in which the role

of the cities themselves is promoted as well as that of their networks of facilities, infrastructures, services and transport. Furthermore, the terms relate to the adoption of models of governance, and in our research we focused on the articulation of different actors to achieve more integrated funding allocation and on integrating different instruments and territorial planning policies. Actors rate the importance of both these dimensions very similarly. Collective responses average at 6.1 and 6.0, respectively, with POR Alentejo and Algarve scoring highest (averages of 6.8 and 7.5, respectively, in both dimensions), and POR Centre, which, based on the QCA, does not mention governance, scoring lowest.

POR Centre, Lisbon and Alentejo also emphasize that there should be equity in terms of access to urban public facilities and services to promote greater interaction between urban and rural areas. However, the Algarve actors still rate the inclusion of social and territorial equity in their document very high (8.0), while POR Centre again scored the lowest average (4.6), demonstrating that the actors are to a certain extent aware of the weakness of this document. The collective response average for this domain was 6.2.

In terms of the QCA, only the POR of the southern regions of Alentejo and Algarve relate the concept of territorial cohesion to the promotion of diversity and specificity in their territories, keeping in mind their touristic-oriented development policies. And indeed, actors rated these two POR the highest (6.8 and 8.0, respectively). The other three POR were rated between 5 and 6, corroborating our findings in the QCA. The collective response average for this domain was also 6.2.

It should be added that, in contrast with the PROT analysis, in this case the southern and Lisbon POR tried to respond for all or most of the four dimensions of the European discourse, unlike the North and Centre POR, which only responded for two dimensions.

As far as the importance accorded to the European guidelines when implementing the document is concerned, collective response averages, as in the case of the PROT, once again dropped across all dimensions and territories. Responses were very similar, with the collective averages of all four dimensions approximating 4 in POR Centre and Lisbon, 5 in POR North and Alentejo and around 6 in POR Algarve. The latter still has the highest average but this figure also represents the greatest drop in comparison to the score for evaluating the writing of the document. Curiously, the dimension of territorial organization, which is the one dimension that all documents incorporate, based on the QCA, had the lowest response average for implementation (4.5). The other three dimensions scored collective response averages of just over 5. It is noteworthy that POR Lisbon had the lowest response score in the domains of territorial organization and diversity and specificity.

Finally, the actors were reluctant to assign high scores to the collective learning process of writing the document in terms of the territorial cohesion framework (the collective average was 5.3, with no score higher than 6), in contrast with the PROT analysis. However, the opposite is true for the consideration that Portuguese institutions today have for the concept of territorial cohesion today (average score 6.7) and for the four major EU guidelines (average score 6.2). In both cases, these scores are higher than the PROT results. The North, Alentejo and Algarve actors allotted high scores (around 7).

Discussion and conclusions: conceptual transposition or conceptual redefinition?

In the twenty-first century, in the words of Delanty and Rumford (2005), the EU has been constructing European spaces within which European solutions can be employed to solve European problems. Consequently, one of the most important aspects inherent to the 'Europe effect' resides in the understanding of the collective learning processes between member states, and between these and the EU as institutional entity.

TABLE 5 QCA and interview analysis of the five Regional Operational Programmes (POR), according to how they feature the terms 'cohesion' and 'territorial cohesion' in relation to the four major guidelines of the European discourse

Instruments of Regional Planning:		POR The New North	POR Plus Centre	POR Lisbon	POR InAlentejo	POR Algarve21
Importance (on a scale of 1–10) accorded to:						
The European guidelines during writing of document		5.9	4.9	5.3	7.3	8
Territorial governance	In the document (QCA)	Creation of partnerships and inclusion of actors	–	Adoption of models of governance	Adoption of models of governance	Articulation with the instruments of territorial planning
	During writing of document	5.9	4.5	5.8	6.8	7.5
	During implementation of document	5.2	4.0	4.5	5.2	6.5
Territorial organization	In the document (QCA)	Improvement of road networks and public transport	Relevance of sub-regional urban systems and centres	Polycentric development of territories; reinforcement of the infrastructures supporting territorial integration; relevance of urban centres	Reinforcement of the competitiveness and attractiveness of cities; articulation of urban with rural areas; consolidation of the network of public services; implementation of public transport systems	Promotion of a polycentric urban system; integration of cities and the country in supra-national spaces; assertion of a balanced regional urban network; consolidation of the public services network
	During writing of document	5.4	5.0	5.5	6.8	7.5
	During implementation of document	5.5	4.2	3.0	5.0	5.0
Diversity and specificity of territorial policies	In the document (QCA)	–	–	–	Promotion of the cultural identity of the region	Economic appreciation of endogenous resources; promotion of a more sustainable use of natural resources; reduction of environmental impacts; economic-cultural assertion of the rural Algarve
	During writing of document	5.3	5.1	5.8	6.8	8.0
	During implementation of document	5.4	5.0	4.8	5.2	6.0

TABLE 5—Continued

Instruments of Regional Planning:		POR The New North	POR Plus Centre	POR Lisbon	POR InAlentejo	POR Algarve21
Importance (on a scale of 1-10) accorded to:						
Social and territorial solidarity and equity	In the document (QCA)	–	Equitable access to public facilities and services	Creation of positive discrimination measures to improve access to urban comforts	Equitable access to public services	
	During writing of document	5.4	4.6	6.0	6.8	8.0
	During implementation of document	5.2	4.5	4.8	5.2	6.0
Additional interview questions						
Evaluate the collective learning process of writing the document in terms of the territorial cohesion framework		5.6	4.2	5.3	5.8	6.0
Do you think Portuguese institutions today have greater consideration for the concept of territorial cohesion?		7.2	6.3	6.0	7.0	7.0
Do you think Portuguese institutions today have greater consideration for the major EU guidelines for the concept of territorial cohesion?		6.4	5.5	5.3	7.0	7.0

However, even though Europeanization is no longer regarded as a top-down process, but rather as an interactive co-evolutionary process, national regional actors still face theoretical and empirical challenges when they attempt to operationalize concepts conceived at the European level into their national and regional agendas. The debate that centres on territorial cohesion is thoroughly representative of these challenges, as the concept is far from being implemented systematically and by consensus. The literature thus calls for research that can clarify how the concept of territorial cohesion has been systematized and appropriated at a local scale.

This article contributes to existing literature using a triple approach to reveal and understand the intricacies of the transposition and/or redefinition process within the debate around the spatialities of Europeanization. First, a QCA of the three main European documents addressing the concept of territorial cohesion uncovered the analytical framework—represented by four dimensions—that shapes the European discourses on this theme. Secondly, a QCA of two sets of Portuguese regional planning documents revealed geographical disparities in the interpretation of the term (between the EU and Portugal, and between different Portuguese regions). Thirdly, a set of structured interviews with the main actors who wrote or implemented the plans served as a validation tool and provided further insights into the transposition and/or redefinition process.

The first conclusion is that the concept of territorial cohesion (or at least the term) has indeed become part of the vocabulary of the main Portuguese regional planning documents, particularly of the PROT. Actors who were interviewed corroborated this assessment by grading the concept's presence with a score of 7.6 (on a scale of 1 to 10) for the PROT and with a score of 6.5 for the POR. However, neither the PROT nor the POR present a straightforward definition of the concept. Also, the PROT and the POR do not use the term consistently. Indeed, the PROT seem to accord more importance to the concept of territorial cohesion than to the concepts of social and economic cohesion, while the opposite happens in the POR.

Furthermore, the various regional documents are somewhat inconsistent in their response to the four major priorities of European discourse, and the actors recognize that they did not accord them a great deal of importance during the writing process (the average scores were 6.1 and 6.3, respectively) and even less when implementing them. The dimension of territorial organization seems to have been adopted most widely, featuring prominently in ten of the eleven regional documents we analysed, and being graded relatively high by the actors (except on the implementation of the POR). In addition, seven out of the eleven documents reinforce the importance of social and territorial solidarity and equity, although it does not obtain very high scores in the interviews. However, the plans respond in divergent ways to the other two dimensions, something the interviews corroborate. Also, the PROT focus extensively on territorial diversity and specificity, while hardly addressing territorial governance, whereas in the POR the reverse occurs.

This difference between the PROT and the POR may stem from the very nature of these instruments. The PROT are clearly territorial planning instruments, whereas the POR closely follow the guidelines of the cohesion policy as defined by the Lisbon Strategy (now Europe 2020), which focuses on intervention areas other than the territorial dimension.

Further disparities have been found particularly at the geographical level. The Northern, Central and Alentejo regional PROT documents incorporate the term 'territorial cohesion' more often and try to respond to all four dimensions of the European discourse, using the term as a structuring and strategic guiding principle. The other PROT, by contrast, use the term more sparingly, mainly associating it with territorial organization and diversity and with promoting certain sectorial domains. Curiously, the northern actors systematically underestimate the importance accorded to

the European dimension when writing or implementing their documents, whereas the Lisbon actors tend to overestimate it. PROT Center and PROT Alentejo actors allotted the most coherent results in the QCA and the interviews, representing the highest scores.

In the POR, the reverse seems to occur, with the exception of the Alentejo region, which again scored highly in the QCA and the interviews. The POR of the northern and central regions incorporate the concept of territorial cohesion less frequently than their southern counterparts. In fact, the Lisbon, Alentejo and Algarve POR respond to all or most of the four dimensions of the European discourse, in contrast to the North and Centre POR. Yet, even though in most POR territorial cohesion is seen as a strategic orientation principle in sectorial domains, priorities seem to differ from region to region. While the North and Lisbon POR associate 'territorial cohesion' with local and urban social strategies, the Alentejo and Algarve POR associate it with economic competitiveness, self-promotion and growth. PROT Center, in turn, associates it with a network logic between urban areas. The interviews mostly corroborate the QCA, while indicating a tendency for overestimation on the part of the Algarve's actors and an assumed weakness in the assimilation of the European guidelines in the North, Center and to some extent the Lisbon POR, which had the lowest scores.

In conclusion, it can be said that Portuguese regional planning documents, as a whole, have in fact been successful in conceptually transposing the term 'Territorial Cohesion' from the European discourse, in its various dimensions, to regional realities. However, this is not the case when we consider the documents individually. Regional actors have clearly not assigned great importance to the EU orientation and have attempted their own conceptual redefinitions or reinterpretations to better suit the main strategic priorities of their respective regions. Furthermore, they have awarded lower scores than expected to the collective learning process of writing the documents in terms of the territorial cohesion framework (with averages of 6.8 and 5.3 for the PROT and the POR, respectively), and have graded at an average of 6 the consideration that Portuguese institutions have today for the concept and for the major EU guidelines.

These are important results, as they may indicate that, within the institutions that are responsible for writing these plans, there was no clear strategic orientation towards following the EU guidelines. This may indicate a peripheral political positioning derived from the subjective gap between European macro planning and regional and local planning. The results may furthermore indicate that insufficient conditions were created to promote debate and exchange of knowledge and information between regional actors to generate processes of collective learning and thus national harmonization of concepts and strategic priorities.

It can be assumed that Europe has a long way to go to create a homogeneous discourse at regional and even national levels, precisely because regions pursue different goals, which are reflected in the ways the regions elaborate their strategies. However, it should also be noted that actors from Alentejo and the West and Tejo Valley (for the PROT) and actors from the North, Algarve and again Alentejo (for the POR) allotted a score above 7 to the importance Portuguese institutions now assign to the concept of territorial cohesion and the respective EU guidelines. This slight improvement may represent a paradigm shift and a step towards cohesion, but might also have been fomented by the country's recent economic crisis and the profound changes to community support frameworks in the wake of the 2020 agenda.

Consequently, further research should explore the motives for this shift to have occurred, namely by comparing the results obtained here with those of other European countries, particularly in southern Europe. It is also important to evaluate in the near future whether these attitudes towards European guidelines when designing local policy documents have in some way shifted or evolved in the context of current community support frameworks. This could shed light on the specific long-term consequences in the new millennium of the 'Europe effect' on national planning policies, as well as

provide an evidence base that supports clarification in the literature and in official national and international documents of the concept of territorial cohesion. A more consensual analytical and normative transposition and application of the concept is also of crucial importance to the cohesion policy agenda.

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