

Cohesion policy and metropolitan governance: innovation in stakeholders collaboration practices in Lisbon

Política de cohesión y gobernanza metropolitana:
innovación en las prácticas de colaboración en Lisboa

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Abstract:

This study examines the impact of Cohesion Policy on metropolitan governance and stakeholders' collaboration practices in the Lisbon region. The financial crisis and subsequent austerity policies have underscored the importance of institutional arrangements and governance processes, particularly at the local and regional levels. Focusing on the Lisbon metropolitan area, which faces fragmented institutional structures and governance challenges, this research highlights the role of Cohesion Policy through Integrated Territorial Investments (ITI) in fostering innovation and collaboration among stakeholders. The EVA (Green and Blue Corridor) project in the Lisbon

Received: 17.02.2023

Accepted: 30.05.2023

Published: 04.07.2023

Metropolitan Area exemplifies the role of EU funding in promoting cooperation and governance innovation. The introduction of ITI under the Cohesion Policy has facilitated the establishment of collaborative networks and innovative practices in the metropolitan area. These initiatives have broken down planning silos, promoting "soft spaces of governance" that encouraged knowledge exchange and institutional learning among territorial stakeholders. However, challenges persist in the absence of a coherent regional strategy and the prioritization of broad EU objectives over tailored regional needs. This hampers the potential for integrated and proactive territorial management. Nevertheless, Cohesion Policy has stimulated stakeholder collaboration and innovation in metropolitan governance, paving the way for sustainable and inclusive development in the Lisbon region.

Keywords: institutional collaboration; EVA project; territorial cohesion; soft governance; Integrated Territorial Investments.

Resumen

Este estudio examina el impacto de la Política de Cohesión en la gobernanza metropolitana y las prácticas de colaboración de las partes interesadas en la región de Lisboa. La crisis financiera y las políticas de austeridad posteriores han subrayado la importancia de los arreglos institucionales y los procesos de gobernanza, en particular a nivel local y regional. Centrándose en el área metropolitana de Lisboa, que enfrenta estructuras institucionales fragmentadas y desafíos de gobernanza, esta investigación destaca el papel de la Política de Cohesión a través de Inversiones Territoriales Integradas (ITI) en el fomento de la innovación y la colaboración entre las partes interesadas. El proyecto EVA (Corredor Verde y Azul) en el Área Metropolitana de Lisboa ejemplifica el papel de la financiación de la UE en la promoción de la innovación en la cooperación y la gobernanza. La implantación de las ITI en el marco de la Política de Cohesión ha facilitado el establecimiento de redes colaborativas y prácticas innovadoras en el área metropolitana. Estas iniciativas han roto los silos de planificación, promoviendo "espacios blandos de gobernanza" que alentaron el intercambio de conocimientos y el aprendizaje institucional entre los actores territoriales. Sin embargo, los desafíos persisten en ausencia de una estrategia regional coherente y la priorización de los objetivos generales de la UE sobre las necesidades regionales específicas. Esto dificulta el potencial de una gestión territorial integrada y proactiva. Sin embargo, la Política de Cohesión ha estimulado la colaboración de las partes interesadas y la innovación en la gobernanza metropolitana, allanando el camino para un desarrollo sostenible e inclusivo en la región de Lisboa.

Palabras clave: colaboración institucional; proyecto EVA; cohesión territorial; gobernanza *soft*; Inversiones Territoriales Integradas.

1 Introduction

Territorial cohesion highlights various issues which are central to Cohesion Policy in the European Union. Among these are the environmental dimension of sustainable development and the use of flexible functional geographies for territorial development (European Commission, 2018, p. 96). The integration of European Structural Funds into a comprehensive Cohesion Policy, in 1988, signalled the determination of the EU administration in strengthening economic and social cohesion among European regions. The Treaty of Lisbon, in 2009, followed by the Europe 2020-Strategy for smart, sustainable, and inclusive growth (European Commission, 2010) (henceforward referred to as EU2020), introduced a third dimension: territorial cohesion. Inspired by the Green Paper on Territorial Cohesion (Commission of the European Communities, 2008), which envisioned a new generation of territorial policies, and by the Barca Report (2009), advocating place-based approaches to regional development, the Territorial Agenda 2020 (European Union, 2011) established the main territorial priorities towards the implementation of EU2020.¹ This emphasis on territorial issues (which continued in the Territorial Agenda, hereafter TA2030), in the conception and execution of public policies, coupled with the effects of the 2008 financial crisis, implied major changes, and new challenges in the workings of local and regional bodies of public administration. While compliance with European directives was a requirement for much needed funds, traditional methods and instruments of urban planning and management, as well as institutional arrangements, had to adapt to a new type of territorial governance.

In the wake of the 2008 financial crisis and ensuing budgetary constraints, territorial governance in Europe underwent significant changes and further challenges for the implementation of spatial planning policies towards sustainable, integrated, and inclusive territorial development. Southern

1 According to the Territorial Agenda 2020 (TA2020), launched in 2010, the 6 key territorial priorities to fulfill the Europe 2020 Strategy are: (1) to promote polycentric and balanced territorial development; (2) to encourage integrated development in cities, rural and specific regions; (3) to promote territorial integration in cross-border and transnational functional regions; (4) to ensure global competitiveness of the regions based on strong local economies; (5) to improve territorial connectivity for individuals, communities and enterprises; and (6) to manage and connect ecological, landscape and cultural values of regions. Since 2021, the Territorial Agenda 2030 (TA2030) defines 2 all-embracing objectives which have 3 priorities each for developing the European territory (<https://territorialagenda.eu/ta2030/aim/>): a Just Europe (Balanced Europe, Functional Regions, Integration Beyond Borders) and a Green Europe (healthy environment, circular economy, and sustainable connections).

European countries were severely hit by the crisis, and Portugal the more so given its strong dependence on – and fragile integration in – the Eurozone (Rodrigues and Reis, 2012). The response to the crisis was dominated by neoliberal policies, within the scope of economic bailout programmes across the Eurozone periphery as of 2010-11 (Hadjimichalis and Hudson, 2014; Vale, 2014). These translated into austerity measures which resulted, among other consequences, in major changes in the role played by regional and local actors in the implementation of place-based approaches to development.

The modern nation-state crisis, which to a large extent transformed neoliberalism into something like an unavoidable truth, also changed planning and land use (Wassenhoven, 2008). Crises and restricted public budgets, activated local authorities to mobilize multiple funding sources, including EU cohesion funds, to carry out regional policies and local projects to address convergent territorial and environmental problems. Moreover, they had to ensure networking and cooperation of a growing number of stakeholders sharing the same functional territories (Ferrão et al., 2013), meaning an integrated territorial and multilevel approach.

In line with political pressures to change the European Union Cohesion Policy (EUCP), new mechanisms were introduced to promote networking and cooperation among stakeholders at subnational level, such as Integrated Territorial Investments (ITI) and Community-led Local Developments (CLLD) initiatives, that member states adopted in various ways. Some questions arise from EUCP induced innovation in territorial governance: (i) what are the lessons to be learned from this creative and evolving landscape of territorial governance levered by EU? (ii) In times of climate crisis and restricted public budgets, what is the evidence of good practices in delivering sustainable and inclusive development policies? (iii) How can the synergies between diverse stakeholders be exploited through vertical and horizontal co-ordination of EU strategies, regional policies and programmes, and local development projects? (iv) Are the functional areas better adapted to those recent challenges of sustainable, integrated, and inclusive development, highlighting the relevance of flexible functional areas for territorial development?

To answer these questions, and based on evidence from current practice, in this research we discuss the recent shifts and new challenges in territorial governance induced by the EUCP changes in an inter-municipal environmental strategic project in the Lisbon Metropolitan Area called *Eixo Verde e Azul* (Green and Blue Corridor), hereafter EVA project. In this paper we address the impact of the European Union Cohesion Policy (EUCP) in metropolitan governance, namely its stimulus for territorial cooperation and stakeholders' collaboration in the Lisbon

Metropolitan Area, while bearing in mind several constraints hindering cooperation in this functional region, punctuated by variegated actors, policies and strategies in a highly dynamic space of flows and interactions.

The remainder of the paper proceeds as follows. First, we briefly review the extant literature on the impacts of the crisis in territorial governance. Secondly, we introduce the collaborative EVA project in the metropolitan area aiming at assessing the impact of EUCP in the promotion of public and private stakeholders to deliver an inter-municipal sustainable project. The third section outlines the research methodology approach. Then, we present the results (Section 4) and discuss the results of our research (Section 5), focusing on the network of territorial development stakeholders involved in the project, and the exchanges of knowledge, cooperation, and communication among them. The following section (Section 6) reflects more widely on the main territorial development perspectives that are shared by the key stakeholders and the interconnected factors that constitute major opportunities and challenges to an efficient planning process towards sustainable and inclusive territorial development. Finally, the conclusion addresses the main lessons learnt to metropolitan governance that emerge from the strategic process aiming at promoting sustainable and inclusive development in the region and may be transferable to other ITIs in European functional regions, whenever local/intermunicipal cooperation is a requisite condition.

2 Impacts of the crisis in territorial governance

The global economic crisis impacted the spatial planning establishment and challenged the comprehensive planning model that was being questioned by alternative approaches based on collaborative action in which the authority of experts is diluted among several scales and stakeholders' rationalities (Wassenhoven, 2008). Also, the planning system, usually aligned with, and promoted within administrative boundaries, is "based on the concept of territory as a neatly ordered space" (Stead, 2014: 1369). However, the complexities of European spaces call for planning policies and practices that are capable of accommodating "new geographies" competent to "transcend" administrative entities and administrative boundaries (Haughton et al., 2010; Purkarthofer, 2019) in order to redefine territorial governance.

Various definitions can be found for the concept of territorial governance. As defined by Schmitt et al. (2013, p. 11), territorial governance is "the formulation and implementation of public policies, programmes and projects for the development of a place/territory". The authors advocate that to achieve place-based impacts and territorial cohesion, it should integrate policy

sectors; coordinate the actions of multiple actors and institutions; mobilize stakeholder participation; and be adaptive to changing contexts. This agrees with the EU2020 agenda (and the following EU2030 agenda), which calls for a place-based, multi-level, territorially responsive and integrated approach to policies, capable of developing synergies between different stakeholders and sectoral policies. Also, in line with the challenges to be addressed by ESPON 2030 Programme (ESPON, 2021, p.5), “Europe is becoming increasingly fragmented in terms of socio-economic development, landscape, culture, and politics. In particular, the disparities’ increase is more pronounced between regions, municipalities, and neighbourhoods than between countries, requiring territorial and functional approaches”. So, the reported fragmentation requires institutional cooperation towards integrated territorial interventions, a core ambition of the EU territorial agenda.

Cooperation is needed to enhance the provision of services at a functional scale (rather than an administrative one), including experimental approaches to integrated local development. In preparation of the post-2020 Cohesion Policy, under the EU2030 Agenda for Sustainable Development, ESPON has underscored the need for strengthening policy focus on territorial cooperation (Böhme et al., 2017). A key objective of cohesion policy, territorial cooperation means joint action and exchange of policy ideas and experience between national, regional, and local authorities. It also requires the adoption of shared strategies to solve common problems (European Commission, 2018). The incorporation of territorial cooperation as an explicit component of the new funding cycle has the potential to provide greater capacity for coordinating and integrating funding sources and planning strategies towards sustainable and inclusive development.

An example of territorial cooperation highlighted by Böhme et al (2017) is the coordination of more eco-friendly forms of physical connectivity across administrative borders (an issue of particular interest for our study). This implies the recognition of functional regions that may be defined, in general, as large sub-regional spatial units, non-overlapping with political-administrative boundaries, which include interdependent urban, rural, and natural areas internally linked by a kind of functional relationship (Balula & Bina, 2015). According to OECD (2002) those are territories sharing a set of common conditions, which can enhance a specific type of social and economic development, so as become relevant territories for the development of integrated territorial interventions. In terms of public policy, they provide a territorial basis relevant for cooperation between different actors and integrating sectoral policies, guided by a common vision and a shared development strategy. However, as identified by Faludi (2012),

there are two main obstacles to the implementation of integrated and multi-sectoral development strategies in functional regions. On the one hand, multi-sector territorial governance is usually more concerned with linkages and networks among governmental levels rather than governance. On the other hand, territories are too often understood as 'fixed', rather than 'softer' or functional spaces.

As noted above, to facilitate the implementation of integrated territorial development strategies, the EU Cohesion Policy (EUCP) investment cycle (for 2014-2020) has introduced two key mechanisms: Integrated Territorial Investments (ITI) and Community-led Local Developments (CLLD). These financial instruments allowed Member States to design and deliver actions from Operational Programmes in a cross-cutting way and to draw on funding from several priority axes of one or more Operational Programmes to ensure the implementation of an integrated strategy for each specific territory (European Commission, 2014). Specifically, ITIs draw funds from the European Regional Development Fund (ERDF), the European Social Fund (ESF) and the Cohesion Fund. To qualify as an ITI, there should be a designated territory and an integrated territorial development strategy; a package of actions to be implemented; and specific governance arrangements to manage the ITI (European Commission, 2014).

The EVA project is supported by an ITI in the Lisbon region and depicts a good case for analysing the impact of EUCP recent shifts and new challenges in metropolitan governance and urban development. The EVA project is located in a highly dense suburban area where the process of "regional urbanization" (quoting Ed Soja's) replaces the familiar metropolitan model of urbanization (the previous dominant urban process), meaning the erosion of the boundary line between suburbs and city-center, erasing the modern difference between city and suburb (Queirós, 2016). Therefore, the next section introduces the project, which benefited from the ITI strategy during the EU programming cycle for 2014-2020.

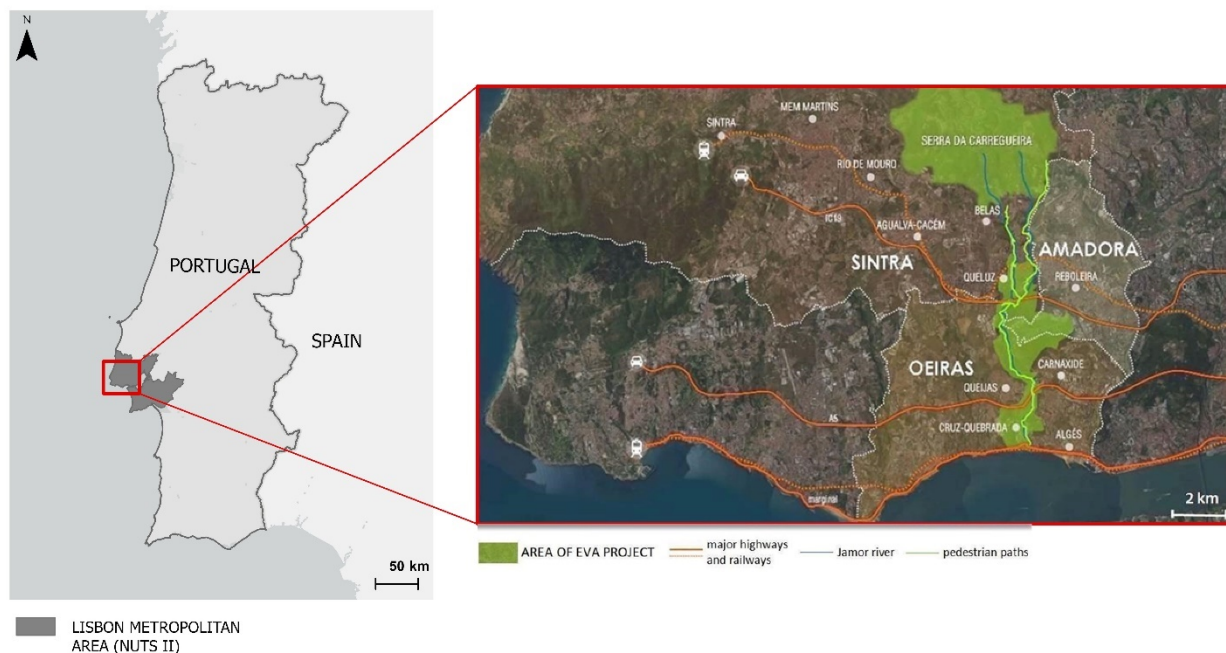
3 The EVA Project: an overview

In July 2016 the municipalities of Sintra, Oeiras and Amadora, together with Parques de Sintra – Monte da Lua (PSML),² a public-owned company operating in the field of tourism and leisure in

2 PSML's management competences regarding heritage sites – which earned them in 2017, for the fifth consecutive year, the first place of the World Travel Awards in the category 'Best Company in the World in Conservation' – are very beneficial for articulating sustainable and economic development goals (in the scope of regional tourism). Overall, local authorities' collaboration with PSML is very positive and has opened-up new possibilities to deliver sustainable and inclusive growth in the Lisbon Metropolitan Area, challenging the

the region, voluntarily signed a joint protocol to collaborate and develop the EVA project. EVA stands for *Eixo Verde e Azul* (Green and Blue Corridor) and concerns the creation of a vast green park (Parque Queluz-Jamor), structured by the river Jamor and covering an area of approximately 10 km² shared by the three contiguous municipalities (Figure 1).

Figure 1. The EVA Project



Source: adapted from EVA project (Parques Sintra Monte da Lua and Sintra municipality)

EVA is an ecological axis that foresees the requalification of 50 ha and the creation of 100 ha of new green spaces along the Carenque stream and the Jamor River. It provides an ecological form of physical connectivity across administrative borders, interconnecting many territorial assets (natural, patrimonial, and infrastructural) in the three municipalities. It seeks to facilitate the population's access to the enjoyment of nature and heritage, through the restoration and creation of green spaces and the implementation of a smooth circuit of pedestrian and bike paths intended to promote active mobility. To accomplish these goals, the project required a joint strategy and an alignment of local actors towards a shared and integrated development vision of the region. It also provided an opportunity for horizontal integration and territorial cooperation between municipal authorities, with the commitment to a joint investment in the ecological

'individual' solutions traditionally followed by the municipalities. Thus, intermunicipal collaboration had the power to unlock the under-utilized potential and capabilities contained at sub-national level.

requalification of the river and its margins, together with the surrounding highly suburbanised areas, including the creation of several new urban public spaces.

The strategy of the Green and Blue Corridor is intended to improve the connectivity of a dense, fragmented, and complex suburban territory in the Lisbon hinterland, while facilitating soft mobility between public facilities adjacent to the corridor. It is also expected that this project improves several environmental and cultural assets, reducing flood risks and connecting passageways, adding to the quality of life and wellbeing of residents and workers in the region. These goals revealed to be current and relevant in the ESPON 2030 Programme – as stated in its main development challenges and policy responses (ESPON, 2021). Through those goals, the EVA project intends to advance sustainable and inclusive development as promoted by EU2020, stimulating a shift towards a low-carbon economy, providing solutions to climate change adaptation, preserving and protecting the local environment, and encouraging sustainable transport. Thus, in the scope of the EU2020 strategy (inclusive and sustainable development) and promoting Sustainable Development Goal 11 (Sustainable Cities & Communities), the project contributes to several critical issues for the region, such as adaptation to climate change, risk prevention and management, environmental protection and the transition to a low-carbon economy.

The EVA project evolved through an adverse conjuncture, shaped by a financial crisis, subsequent public-sector budget cuts and investment slowdown (Mourão & Marat-Mendes, 2015; Ferreira et al., 2017). On the other hand, EVA benefited from an administrative reform in Portugal, aiming at political decentralisation and favouring the establishment of inter-municipal bodies (assemblages of local authorities based on NUTS 3 level sub-regions, e.g. *Comunidades Intermunicipais*, (Intermunicipal Communities). This reform has been important for exploring new and innovative opportunities arising within the European Structural and Investment Funds programming period 2014-2020, namely the possibility of adapting to new rules and legislation governing this round of EU Cohesion Policy investment. These new rules allowed for the decentralization of part of the funds and their investment in territorial management projects, which contributed to an important behaviour change among territorial stakeholders in terms of increased cooperation. Moreover, in Portugal, all NUTS3 received national incentives for territorial cooperation within Intermunicipal Communities and Metropolitan Areas.

In line with the integrated territorial development approaches encouraged by the EU2020 framework, the 18 municipalities of the Lisbon Metropolitan Area body (AML) approved an

Integrated Territorial Development Strategy for the region (AML, 2015), which was followed by the approval of a Development and Territorial Cohesion Pact for the Metropolitan Area (PDCT-AML, 2015b) with Regional Authority of Lisbon and Tagus Valley (CCDR-LVT), the body responsible for the management of the Regional Operational Programme in Lisbon (NUTS2 level), hereafter designated by POR-L. The CCDR-LVT is a regional body acting on behalf of the central government, and is accountable for the management of European Structural and Investment Funds associated with the implementation of the POR-L. This institutional arrangement represents an innovation in territorial planning policy, as it brings the idea of regional coherence into an otherwise centralised political system in Portugal.

In the scope of PDCT-AML, a new instrument was available – the Integrated Territorial Investment (ITI) – which demanded a new implementation arrangement. Hence, the Lisbon Metropolitan Area body (AML) become an intermediate body in the Operational Programme management structure. Benefiting from the ITI, the municipalities of Oeiras, Sintra and Amadora (part of AML), were able to craft an integrated spatial vision for a shared functional territory, and thus ensure partial funding for the EVA project. A full account of the institutional network of actors and stakeholders involved in the EVA project is detailed on Figure 2 (more details in section 5).

The EVA project was initiated (through a protocol) in July 2016 and, given the project's magnitude and the range of different interventions, it is supposed to have an extended temporal horizon well beyond the EU funding cycle of 2020. Several actions are to be funded by municipal budgets, which require continued incentives (financial or otherwise) through different political cycles, while others would benefit from ITI funding. For these reasons the whole project, currently in progress, will desirably be completed in a timely manner. The total amount of investment foreseen for the EVA project is, around 11 million, in a first phase. In the scope of POR-L, the EVA project applied for funding actions amounting to around 1.8 million euros, having benefited from a contribution from the ERDF in the amount of around 870 thousand euros.³

3 Total investment and EU funding for the EVA project can be found here: https://ec.europa.eu/regional_policy/pt/projects/Portugal/eu-funded-project-creates-green-and-blue-axis-in-lisbon-portugal

4 Research methodology

In order to carry out the research, after a comprehensive literature review of key documents and relevant scholarship on the main topics of the inquiry, a series of interviews were conducted with all key EVA stakeholders, comprising top public officials of the three municipalities, all engaged in the EVA project; the mediator/facilitator of the project, meaning the chief executive of PSML; the responsible for the environmental and landscape component who is the director and CEO of Biodesign; and the First Secretary of the Lisbon Metropolitan Area (AML), representing the higher level of regional planning and management involving its 18 municipalities. Table 1 lists the stakeholders interviewed and their position in the respective organisation, the organisation's role in the project and the scale of action of each stakeholder (Vale et al., 2017).

The interviews were semi-structured, with the same framework for everyone and used a pilot with open-ended key questions and probes. Stakeholders were public officials and, in one case, an independent contractor, and were all directly involved in the EVA project, therefore with privileged access to information which could provide specific knowledge or in-depth data on the various domains of the project. After each meeting, interviewees received an online survey/questionnaire to validate their views on the extent to which the EVA project contributes to fulfilling objectives related to territorial governance processes towards the project implementation.⁴ Another set of questions evaluated their judgement about the EVA contribution to the thematic objectives established by the Cohesion Policy (European Commission, 2011) to fulfil the EU2020 Strategy.

The online survey had two main questions: (1) *Concerning the EVA programme, and from the point of view of your organisation, do you consider that the programme contributes to ...* (followed by a list of 26 topics); and (2) *The Cohesion Policy has set 11 thematic objectives to meet the objectives of the Europe 2020 Strategy. In your opinion, how does the EVA programme contribute to each of these objectives?* (followed by the 11 thematic objectives). Also, in the final section the respondents could include some free comments or opinions, either about the EVA project or about the way their entity/department related to the project. An overview of the answers suggested main points of agreement among these stakeholders, which are described in the next

4 The number of stakeholders enrolled in this project does not allow for any type of quantitative analysis, which for the purpose of this study is not a relevant issue.

section. Responses received from all interviewees point to positive socio-institutional and territorial innovation.

Table 1. Interviewed participants (the levers of the project) with a relevant role in EVA

ORGANISATION	POSITION	ROLE OF THE ORGANISATION	SCALE OF ACTION
Oeiras Municipality	<ul style="list-style-type: none"> • Director of the Urban Planning & Management Department/Chief official of the Municipal Development Council • Head of the Municipal Development Office 	Implementation Funding Management Local Development	Sub-regional
Sintra Municipality	<ul style="list-style-type: none"> • Deputy director of the Urban Planning Department 	Implementation Funding Management	Sub-regional
Amadora Municipality	<ul style="list-style-type: none"> • Councilman • Councilman deputy 	Implementation Funding Management	Sub-regional
Sintra e Monte da Lua Parks (PSML)	<ul style="list-style-type: none"> • Chief of the EVA Project Cabinet 	Coordination Mediation Facilitation	Supra-municipal
Lisbon Metropolitan Area of (AML)	<ul style="list-style-type: none"> • First Metropolitan Secretary 	Project evaluation Regulation	Regional
Biodesign	<ul style="list-style-type: none"> • Director & C.E.O. 	Environmental and landscape projects	Supra-municipal

Source: Vale et al. (2017, p. 5)

Respondents were asked to answer both questions using a Likert scale, ranging from 5 (contributes a great deal) to 0 (does not contribute, or does not apply).⁵ A link to a short glossary of terms employed was made available. The triangulation between previous studies (Ferrão, 2013; Crespo et al., 2016; Gonçalves et al., 2022), and the material collected in interviews and questionnaires provided a full overview of the relationships and knowledge flows among stakeholders. It was therefore possible to identify the levels of vertical coordination and horizontal cooperation, shared territorial development perspectives, strategies and planning mechanisms used, as well as opinions about the challenges and impacts that are expected with the implementation of EVA (Vale et al., 2017).

⁵ Although this scale has some disadvantages, it was defined by the ReSSI project team due to its simplicity of understanding and use.

5 Territorial development stakeholders: knowledge, cooperation and communication

The key stakeholders of EVA are the three municipalities and PSML. However, its implementation “provides a coherent territorial base for integrating different municipal priorities, requires a great deal of coordination and cooperation between a diversity of agents, in a complex multi-level governance context” (Vale et al., 2017, p. 16). The information collected indicates that the project acted as a catalyst towards intermunicipal consensus and collaboration. Therefore, the three municipalities’ stakeholders involved have developed a bottom-up intermunicipal commitment focused on a specific territorial action. Despite the disparate agendas of each municipality to put the project into practice, it was easier to mobilise the actors’ agreement around a “small, concrete project” (as reported by one stakeholder) rather than reaching consensus on large territorial planning strategies. Indeed, as Walburn and Saublens (2011) have noted, at the regional level, macro strategies may not be always appropriate, as they often impose programmes which may not meet local needs. Conversely, self-starting local initiatives, which do not require direction from the central government are often more successful in creating economic and social value for the region.

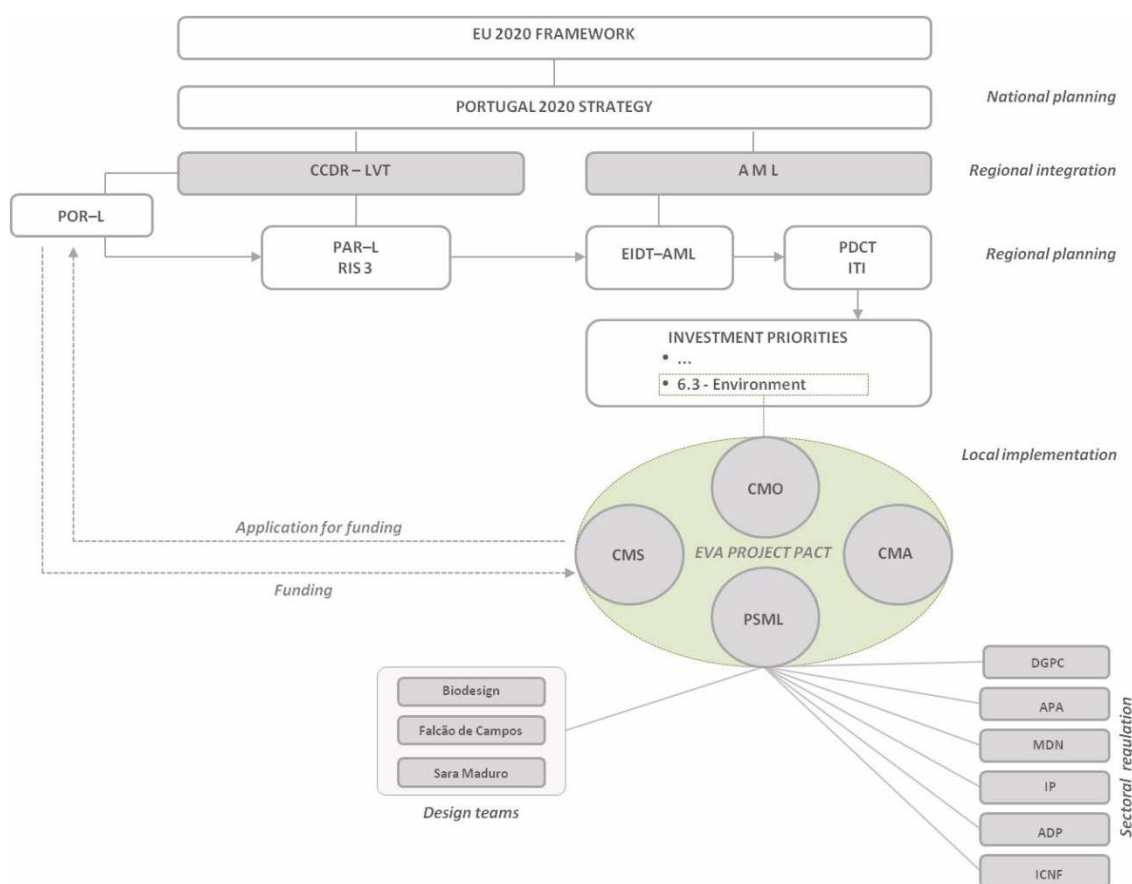
All three municipal stakeholders have emphasized the successful establishment of robust and constructive horizontal cooperation, as well as knowledge exchange, within the scope of EVA. This mobilization of key local stakeholders, including PSML and the three municipalities, alongside regional authorities and sectoral statutory agencies, was achieved through a meticulous negotiation process conducted in a series of deliberative meetings. The purpose of these meetings was to anticipate and address potential conflicts between municipal priorities and any legal challenges that may arise. It was noted that the territorial dimension of EVA has improved the horizontal integration between local authorities, as well as vertical integration between governance scales.

Due to the emergent plurality of scales, Farinós and Garrido (2021) concluded that local stakeholders usually consider appropriate to focus on a “minimum” spatial planning policy, realistic and effective, capable of materializing rather to bet on huge projects. And this “minimum” spatial planning is increasingly transcending traditional administrative/governmental bodies, calling for soft planning, relying on cooperative strategies and planning actions dealing with vague/fuzzy boundaries (Haughton et al., 2010; Purkarthofer, 2019). This soft planning

system retains flexible powers of action and seems to be perceived to meet less resistance if focused on an idea of “common good” (Purkarthofer, 2019).

The institutional map (Figure 2) shows the complete network of territorial stakeholders, planning instruments and major strategies linked to EVA. In the functional metropolitan area of Lisbon, at a higher level of government, as reported before, the two agencies with responsibilities in regional governance and spatial policy co-ordination are the Regional Authority of Lisbon and Tagus Valley (CCDR-LVT) and the Lisbon Metropolitan Area (AML). The first is a technical body of the central government, accountable for the management of structural funds in the region and the second a political inter-municipal body representative of its 18 municipalities. As a formal candidate for funding under PT2020 (the Portuguese Partnership Agreement with the EU), the EVA project had to comply with the policy framework of the Regional Operational Programme of Lisbon (POR-L, 2014-20), coordinated by CCDR-LVT, and to join the list of actions to be funded by ITI for the region (AML, 2015a and 2015b), managed by AML. At that time EVA was operationally managed as a set of individual actions which were submitted for approval by each of the local authorities involved in the project (Vale et. al, 2017).

Figure 2. Territorial stakeholders, planning instruments and major strategies



Source: Vale et al. (2017, p. 18)

Another group of actors in the EVA project are the statutory planning authorities with sectoral accountability and the power to approve or veto territorial interventions within their jurisdiction at a national level: the Portuguese Environmental Agency (APA), the Cultural Heritage Agency (DGPC), the Nature and Forest Conservation Agency (ICNF), Portugal Infrastructures (IP) Portugal Waters (ADP), and the Ministry of Defence (MDN) (Vale et al., 2017). Institutionally above the municipalities (in the scope of their sectoral area of expertise), these national agencies were involved from the beginning in EVA's coordination meetings, which was critical, as explained above, for anticipating and thus preventing potential obstacles in the future approval of the various territorial proposals of the project. Thus, horizontal integration was possible to achieve both with the main stakeholders and with all the sectoral agents involved.

Finally, a group of three independent design teams are, so far, the only private actors involved in the setting of EVA. A team of Biodesign – Environment and Landscape, coordinated by landscape architect Jorge Cancela, designed the landscape project for the river margins, the pedestrian circuits along the Jamor valley and the project of a pedestrian and cyclable bridge over a major highway, while the architect João Falcão de Campos conceived the strategic plan for the Queluz Palace and surrounding areas, and architect Sara Maduro was responsible for the project of rehabilitation of the public space adjacent to the Queluz Palace. There are no third sector actors involved in EVA.

The individual municipalities are the key local stakeholders of EVA, but PSML has proven to be a crucial player throughout the negotiation process. PSML established the direction of the project and serves as a mediator between the municipalities, playing a pivotal role in their relationship with the central administration. The partnership's success is largely attributed to the structure of PSML, which facilitates cooperative and productive vertical and horizontal relationships among stakeholders (Wassenhoven, 2008). As an autonomous entity, PSML possesses more flexibility and pragmatism compared to the typically hierarchical and bureaucratic local authorities. This allowed PSML to develop an intermunicipal strategic vision and coordinate its implementation. The interviewees unanimously acknowledged the strategic role of PSML as a facilitator, bringing together diverse local priorities. As one stakeholder mentioned, "if the various municipal leaders did not clash, it was due to the coordinating role of PSML... EVA would not be a reality without PSML" (Vale et al., 2017, p. 14). Furthermore, PSML has been instrumental in streamlining the licensing processes with sectoral agencies and the central government by engaging in meetings and negotiations since the early stages of the project.

Among the key stakeholders, there was a consensus regarding the positive aspects of horizontal cooperation, knowledge transfer, and mutual learning. Regardless of their different territorial agendas, it was possible for the local authorities to cooperate in EVA common goal. A political agreement between the three municipalities legitimated technical staff to prepare this collaborative intervention and eventually overcome potential disputes. Quoting one stakeholder, what has been achieved is “quite unusual in public administration” and “a very inspiring experience” (Vale et al., 2017, p. 14). However, it is important to note that horizontal cooperation does not necessarily imply intermunicipal collaboration, and this holds true for EVA as well. Achieving intermunicipal integration requires an appropriate institutional framework, which appears to be challenging, based on the experience of EVA. Despite the collaborative efforts of the local authorities, EVA is debatably not a metropolitan “intermunicipal plan” because each municipality has its own dynamics, strategies, and priorities for implementing their individual EVA projects and actions. Furthermore, each municipality is responsible for securing independent funding, whether through the Regional Operational Plan of Lisbon (POR-L) or other means, as well as managing and maintaining the EVA components within their own municipal boundaries. The process is not overseen by a formal intermunicipal authority, as is typically the case in functional regions, therefore it is more accurately characterized as a “multi-municipal” project.

The Regional Authority of Lisbon and Tagus Valley (CCDR-LVT) evaluated the alignment of each municipal EVA project with the POR-L and controlled access to EU2020 funding accordingly. Additionally, various national and sectoral agencies, each with their own responsibilities for environmental regulation, cultural heritage, forest conservation, and other sectors, had to approve the territorial interventions proposed by the projects. While EVA operated with a more decentralized organization at the local level, it was embedded within a hierarchical framework that involved regional entities and sectoral agencies, to which it had to adhere and respond.

Despite collaborating on the same project, each partner opted for different strategies to implement EVA within their respective territories. It is important to note that the three local authorities chose to employ more flexible and efficient operational planning strategies instead of traditional rational-comprehensive planning methods (such as formal Detail Plans, or *Planos de Pormenor*), which are less adaptable and slower to execute. Nevertheless, each municipality independently aligned its EVA initiatives with its existing preferred strategies. For example, Sintra incorporated EVA into the delineation of a designated Urban Rehabilitation Area (ARU-Queluz/Belas), while Oeiras integrated and expanded EVA interventions into its riverbed and

bank re-naturalization strategy. Amadora municipality decided to integrate EVA actions into its social cohesion policy. Overall, the implementation did not require an integrated metropolitan plan (Vale et al., 2017, p. 8).

Transferring local knowledge among stakeholders was crucial for the development of EVA. Each municipality strategically participated in the partnership, recognizing the priorities specific to their respective territories. Stakeholders emphasized that working collaboratively on the project, while considering both individual priorities and shared interests, led to a valuable learning experience. PSML played a pivotal role as a mediator, aligning the diverse approaches of the municipalities towards a common goal. Simultaneously, PSML facilitated communication between the municipalities and regional agencies, enabling regional coordination and the formation of multi-municipal alliances.

Each municipality was responsible for divulging the EVA project to its residents and encouraging their involvement in the process. However, stakeholders varied in their strategies for disseminating information and promoting public participation. PSML created a six-minute promotional video that was shown in public spaces across each municipality⁶. In contrast, Sintra municipality promoted and disseminated the EVA project through newspaper announcements and public sessions in parish councils. These sessions were considered important for integrating the ideas of local actors and achieving consensus on the EVA proposals. It should be noted that stakeholder meetings to discuss the EVA were not binding, although they were seen as strategic for defining future green infrastructure. Stakeholders generally viewed the EVA as an easily embraced project that did not create social or political divisions and did not involve significant construction or land use changes, since the project was perceived as being environmentally friendly (Vale et al. 2017).

6 Shared territorial development perspectives

The online survey conducted after each interview assisted in revealing the primary standpoints, challenges, and bottlenecks related to territorial development as shared by the key stakeholders. Consensus was reached on the significant contribution of the project in facilitating functional interactions between territories governed by different jurisdictions. The project was also acknowledged for its role in promoting institutional relationships, enhancing communication

⁶ The video can be watched at: <https://www.youtube.com/watch?v=V5V-w7IX6jw>

channels, optimizing investments in shared physical infrastructure, enriching experiences in territorial governance processes and intermunicipal planning, and ultimately, improving the quality of life for workers and residents.

When asked about the extent to which the EVA project contributes to the eleven thematic objectives outlined by the Cohesion Policy to fulfil the EU2020 Strategy, respondents unanimously emphasized the positive impacts and strong contributions of EVA towards several objectives: i) Promoting adaptation to climate change and risk prevention and management; ii) Preserving and protecting the environment while fostering resource efficiency; iii) Supporting the transition to a low-carbon economy (Vale et al., 2017). Furthermore, respondents, with only a few exceptions, also highlighted the contribution of EVA towards promoting sustainable transport, improving infrastructure networks, and enhancing the efficiency of public administration.

Despite the significant enthusiasm exhibited by the key stakeholders, it was evident that there are a few interconnected aspects that present major challenges or bottlenecks to achieve successful cooperation and an efficient planning and management process for sustainable, integrated, and inclusive territorial development policies. Table 2 provides a helpful overview of the barriers and catalysts associated with this particular planning practice.

Several barriers were identified in the process. Firstly, there were organizational mismatches and inconsistencies between different scales of public policies (national, regional, and municipal), leading to procedural tensions, such as overlapping and conflicting plans and programs within the same territories. Secondly, the existing regional authorities, including CCDR-LVT, lack the authority to coordinate an intermunicipal regional strategy within the metropolitan area, except for matters related to EU funding or spatial planning. The powers of AML (Lisbon Metropolitan Area) are also limited to a few specific intermunicipal interventions. Thirdly, each government department and sectoral regulator pursued its own agenda, often leading to clashes with other entities. Fourthly, due to these clashes, state departments and sectoral regulators at all levels tended to adopt a "silo" strategy of self-protection. Lastly, municipalities focused primarily on their own territories, each with its unique dynamics and commitments to its citizens, making it more challenging to develop local alliances. As one stakeholder described it, "each municipality works like an island, it is like an archipelago" (Vale et al., 2017, p. 17).

Furthermore, stakeholders faced difficulties stemming from their limited experience in multi-actor and multi-level governance processes, as well as the inadequacy of traditional planning instruments in addressing emerging forms of flexible planning. On the EU front, it became

evident that stakeholders struggled to grasp and navigate the complex regulatory frameworks of PT2020 and EU2020. Furthermore, the selective allocation of funds based on predetermined investment priorities and project types outlined in the EU2020 guidelines impeded local distinctiveness and hindered local innovation.

Table 2. EVA project: Obstacles and catalysts

OBSTACLES	CATALYSTS
<ul style="list-style-type: none"> — Organisational mismatches and inconsistencies between national, regional, and municipal public policies — Lack of a supra-municipal authority with power to implement a coherent regional strategy — Lack of experience in multi-actor and multi-level governance — Inadequacy of traditional planning instruments for dealing with new types of soft planning — Municipalities primarily focusing on their own territory — Autonomous and often conflicting agendas of government departments and sectoral regulators — Complexity in understanding and navigating the regulatory frameworks of PT2020 and EU2020 — A priori allocation of funds in EU2020 guidelines for specific investment priorities and project typologies 	<ul style="list-style-type: none"> — Integrated Territorial Investments (ITIs) crucial in fostering collaboration and breaking planning silos — Instrumental role of PSML in mediating and mobilizing relevant stakeholders — Early identification and engagement of key stakeholders — Knowledge exchange and institutional learning among territorial stakeholders — Establishing a continuous and sustainable process and rescaling temporalities in the planning process — Emphasizing spatial connections through spatial strategies for future visions

Source: authors' own elaboration

Several authors have highlighted the complex path of metropolitan governance in Lisbon (Crespo & Cabral, 2016; Ferrão, 2013). Until recently, the absence of a clear and comprehensive model of institutional relations has reflected tensions, indecisions, and political divergence. The lack of intermunicipal coordination, facilitated by a regional authority with the necessary political legitimacy for regional planning and management, has received significant criticism from the majority of stakeholders. They recognize the essential role of a regional level and acknowledge that certain infrastructure networks, such as transportation, energy, and water systems, cannot be efficiently managed by individual municipal jurisdictions alone. However, the stakeholders observe that the existing supra-municipal institutional body (CCDR-LVT) encounters difficulties in coordinating a cohesive regional strategy. On one hand, CCDR-LVT is responsible for providing

funding and therefore needs to be pleased by the applicants, but on the other hand, it lacks direct political legitimacy and thus struggles to develop and implement an inclusive and comprehensive territorial strategy in collaboration with various stakeholders.

The Lisbon Metropolitan Area (AML), represented by the 18 municipal mayors, has also its own challenges. It has been criticized for its sluggishness in problem-solving, limited budgetary resources, and historically internal political tensions that have prevented swift decision-making processes and the establishment of a cohesive metropolitan strategy. In 2013, AML gained new competences and structures through Law no. 75/2013, and two years later, it assumed responsibility for transportation and mobility systems in the metropolitan area under Law no. 52/2015. Recent political devolution has resulted in changes to regional bodies and the election of the President of CCDR-LVT by local authorities' representatives, which has improved the relationship between central and local authorities (Vale et al., 2021).

Traditional planning instruments, which primarily focus on land use regulation and urban development, have proven inadequate for addressing emerging forms of soft planning and strategic decision-making processes like the EVA project. These instruments rely on comprehensive and rational models that are often too static and lack agility in adapting to biophysical and socio-political uncertainties and changes. They struggle to accommodate new variables that were not initially considered in the decision-making process or respond promptly to time-sensitive solutions. Scholars such as Wassenhoven (2008) argue that existing planning instruments do not align with the collaborative spatial planning approach of the post-modern era. Additionally, Farinós and Garrido (2021) highlight their limited flexibility in adapting to evolving economic, environmental, social, and political circumstances. Consequently, local stakeholders perceive these rigid planning approaches as hindrances to achieving territorial cohesion (Stead, 2014). To address daily challenges that transcend administrative boundaries, there is a growing demand to break away from the confines of traditional planning approaches, adopt more flexible planning instruments, and embrace the complexity of interrelated territories with overlapping jurisdictions (Haughton et al., 2010; Stead, 2014).

The stakeholders have also identified difficulties in accessing funding under EU2020 as a significant obstacle. The regulatory frameworks of PT2020 and EU2020 are complex and challenging to comprehend and navigate for entities seeking public funds, including municipalities, intermunicipal entities, and private actors. Similarly, the evaluation process for project compliance with procedures and regulations is burdensome (Vale et al., 2017).

Furthermore, concerns have been raised regarding the predetermined allocation of funds in the EU2020 guidelines for specific investment priorities and project types. For instance, the example of bicycle paths has been mentioned multiple times. Municipalities with more pressing priorities and "interesting projects" related to decarbonization and mobility are only eligible for funds allocated to the implementation of bicycle paths. Additionally, stakeholders have criticized the exclusion of actions that could enhance sustainable development in the region, such as the maintenance costs of environmental infrastructures.

Finally, the political dimension presents a challenge to achieving horizontal integration and full cooperation among territorial stakeholders. Municipal priorities often align with political cycles, and despite efforts towards a more holistic approach, sectoral planning authorities and neighbouring municipalities tend to operate as separate entities, competing for political influence and financial resources. This entrenched "institutional culture" acts as a significant barrier to formal change and the required transformation of regional governance to address both longstanding and emerging sustainability challenges.

The EVA infrastructures are still in progress, aiming for a continuous and sustainable process that requires a re-evaluation of temporalities in planning approaches. However, one of the primary challenges is the absence of a strong, clear, and effective supra-municipal or regional leadership, which hampers collective action. In this case, the responsibility for creating joint commitments lies with a public-owned company (PSML) that operates in the field of cultural heritage, tourism, and leisure in the region. Additionally, the fragmented system of regional governance, limited experience in multi-actor and multi-level governance in soft planning projects, and resistance to post-political governance processes further complicate the achievement of sustainable and inclusive territorial development.

Several factors acted as catalysts for the project. Firstly, the reform of Structural Funds played a crucial role by allowing Intermunicipal Communities (CIMs) and Metropolitan Areas to collaborate through the approval of a strategic program under an Integrated Territorial Investment (ITI) framework. This reform broke down planning silos and created new opportunities for collaboration among various actors. Secondly, the early identification and engagement of key stakeholders, facilitated by the agile and pragmatic organization of PSML, played a vital role. PSML acted as a mediator, mobilizer, and facilitator, bringing together relevant stakeholders from the project's inception. This collaborative approach enabled knowledge exchange, institutional learning, and innovative processes of soft planning. The project focused on addressing common

environmental issues, such as the underutilization of green areas and the risks of flooding that affected areas of natural and cultural significance.

The early identification and engagement of key stakeholders were vital for the project's success. By involving relevant stakeholders from the beginning, the project ensured the inclusion of diverse perspectives and expertise. This inclusive approach enabled actions to be prioritized promptly and tailored to meet the specific needs of stakeholders. Moreover, knowledge exchange and institutional learning among territorial stakeholders were integral components of the project. Through several meetings stakeholders were able to share their knowledge, experiences, and best practices. This facilitated a deeper understanding of the EVA project and fostered the development of effective solutions. The exchange of knowledge and institutional learning helped build a shared understanding and collective expertise among stakeholders, enabling them to work together more effectively.

The project placed great emphasis on establishing a continuous and sustainable process, considering the dynamic nature of the region and its evolving challenges. This involved adopting a flexible approach to the planning process. Rescaling temporalities ensured that planning interventions were aligned with the specific needs and timeframes of each stakeholder, promoting efficiency and effectiveness in the planning process without compromising the overall objectives of the project. Spatial connections were given significant importance in the project through the development of spatial strategies for future visions. This approach ensured that the project's outcomes contributed to a more sustainable, integrated, and well-connected region, supporting long-term visions and aspirations.

Despite several obstacles, the project demonstrates that metropolitan governance advancements might occur through flexible spatial arrangements and multi-actor networks, involving strategies, policies, and actions beyond statutory planning instruments. The EVA project exemplifies such advancements in the Lisbon metropolitan area.

7 Conclusions

The financial crisis and subsequent austerity policies had significant impacts, shedding light on the importance of studying institutional arrangements and governance processes. These events underscored the growing role of local and regional actors in implementing place-based development approaches. While the crisis had negative consequences for territories and citizens, it also created opportunities for changes in territorial governance and the emergence of

successful local spatial planning strategies. The EVA project (Green and Blue Corridor) case study exemplifies some of these positive impacts, despite some caveats, demonstrating how creative strategies can be employed to navigate challenges and promote sustainable development at the local level.

The fragmented institutional landscape of the Lisbon metropolitan area presents challenges in conceptualizing, delivering, and evaluating common strategies. The overlapping responsibilities of CCDR-LVT and AML within the same intervention space, coupled with their lack of direct political legitimacy through voting, contrasts with the clear mandates and full political legitimacy enjoyed by the 18 local authorities. This institutional mismatch creates complexities and obstacles in achieving coordinated and cohesive governance. The European Union Cohesion Policy has provided an opportunity to foster collaborative networks at the sub-regional level, promoting sustainable and inclusive development across Europe. One such innovation within the EU Cohesion Policy investment cycle for 2014-2020 was the introduction of Integrated Territorial Investments (ITI). In the context of the EVA project, the stakeholders PSML, and the three municipalities of Oeiras, Sintra, and Amadora took advantage of this opportunity, leveraging ITIs to implement innovative practices within what Haughton et al. (2010, p. 233) refer to as "soft spaces of governance." These collaborative efforts allowed for the integration of different stakeholders and the exploration of new approaches to governance and development within the region.

The success of the EVA project lies in its ability to function as a metropolitan "multi-municipal plan," accommodating the unique dynamics, strategies, and priorities of each participating municipality. This approach allows for individual EVA actions to be implemented within each municipality while fostering collaboration and knowledge-sharing among them. Despite the success of the ITI instrument in fostering collaboration and regional development, it is important to note that there is no single coherent regional strategy in place. While the ITI encourages the avoidance of stand-alone "follow the money" strategies, the promotion of inclusive and sustainable development requires more than just financial considerations (Vale et al., 2017).

The investment and funding support from the European Union played a crucial role in promoting innovation and cooperation in the case of EVA. Without EU funding, it would have been challenging, if not impossible, to capitalize on the opportunities for collaboration and innovation that the project represents. However, it is important to note that Portugal, like other member states, designs programs and projects in alignment with EU objectives. This approach can

sometimes limit the ability to have a more integrated and proactive territorial management, particularly in regions like the Lisbon metropolitan area. The focus on meeting EU objectives may overshadow the potential for tailoring initiatives to address specific regional needs and challenges. Nonetheless, the EU funding has provided a valuable opportunity for cooperation and innovation in the region, contributing to its development and sustainability.

While this case serves as a valuable example of good practice, further studies on intermunicipal and/or multi-municipal cooperation are needed to delve into the sustainability of this type of cooperation strategy. These studies can provide insights into the long-term effectiveness and benefits of such collaborative approaches, ensuring the continued success and positive impacts of projects like EVA.

Acknowledgements: This research was developed under the ESPON ReSSI (Regional Strategies for Sustainable and Inclusive Territorial Development: Regional Interplay and EU Dialogue) that aimed to analyse and compare the role of Cohesion Policy in the planning process and implementation of metropolitan policies, addressing experiences and practices as well as their territorial impact in nine stakeholder territories in Europe, where contexts of governance are changing to become less top down, more flexible, and involve a wider group of organisations (for more information: <https://www.espon.eu/ressi>). Opinions expressed are the author's own and do not represent the views of the ESPON Coordination Unit or the project consortium. The authors wish to express their gratitude to the colleagues of this project consortium, namely Carlos Ferreira, Stewart MacNeill, Kevin Broughton, Giancarlo Cotella, Christian Fertner, Niels Boje Growth, Eduarda Marques da Costa and Herculano Cachinho. The authors are also grateful for the pertinent comments and valuable suggestions of the anonymous referees.

Authorship statement: The authors declare that there is no conflict of interest in relation to the publication of this article. The participation of the authors in the article is as follows. Margarida Queirós (corresponding author): Literature review, research methodology and fieldwork, final revision. Luís Balula: first draft of the paper, fieldwork, infographics and results discussion. Mário Vale: overall revision, methodology and results.

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Annex I. Glossary

- ADP – Águas de Portugal [Portugal Waters Agency]
- AML – Área Metropolitana de Lisboa [Lisbon Metropolitan Area]
- APA – Agência Portuguesa do Ambiente [Portuguese Environmental Agency]
- CCDR-LVT – Comissão de Coordenação Regional de Lisboa e Vale do Tejo [Regional Authority of Lisbon and Tagus Valley]
- CMA – Câmara Municipal de Amadora [Municipality of Amadora]
- CMO – Câmara Municipal de Oeiras [Municipality of Oeiras]
- CMS – Câmara Municipal de Sintra [Municipality of Sintra]
- DGPC – Direção Geral do Património Cultural [Cultural Heritage Agency]
- EAFRD – European Agricultural Fund for Rural Development
- EIDT-AML – Estratégia Integrada de Desenvolvimento Territorial da Área Metropolitana de Lisboa [Integrated Development Strategy for the Metropolitan Area of Lisbon]
- EMFF – European Maritime and Fisheries Fund
- ERDF – European Regional Development Fund
- ESF – European Social Fund
- EU – European Union
- EUPC - European Union Cohesion Policy
- EVA – Eixo Verde e Azul [Green and Blue Corridor]
- ERDF – European Regional Development Fund
- ICNF – Instituto da Conservação da Natureza e das Florestas [Nature and Forest Conservation Agency]
- IP – Infraestruturas de Portugal [Portugal Infrastructures Agency]
- ITI – Integrated Territorial Investment
- MDN – Ministério da Defesa Nacional [Ministry of National Defence]
- PAR-L – Plano de Ação Regional de Lisboa [Regional Action Plan of Lisbon]
- PDCT – Pacto para o Desenvolvimento e Coesão Territorial [Development and Territorial Cohesion Pact]
- POR-L – Plano Operacional Regional de Lisboa Regional [Operational Plan of Lisbon]
- PSML – Parques de Sintra Monte da Lua [Sintra Parks]
- RIS 3 – Estratégia Regional de Especialização Inteligente [Regional Strategy for Smart Specialization]