Territorial Identity and Regional Development

Planning: The IDENTERRA Model

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IN LIEU OF CONCLUSION
Why terraphilia?

REFERENCES
THEORETICAL CONTEXT

- “topophilia” (Tuan 1974)
- “deterritorialisation” (Barel 1986)
- “production of place and contradictory space” (Lefebvre 1991)
- “networked regions, receptive to innovation” (Todtling 1994)
- “end of territory” (Badie 1995)
- “global sense of place” (Massey 1991; Rose 1995)
- “contested spaces” (Massey and Jess 1995)
- "agony of culture" (Ramonet 1998);
- “regions ‘of the mind’ and ‘on the mind’” (Agnew 1999);
- “detraditionalization” (Giddens 1994; Heelas 1999)
THEORETICAL CONTEXT (cont.)

- “claimed local identities” (Haartsen et al. 2000)
- “(re/de)composition and (re)articulation of regions” (Benko 2000)
- "construction of local identities when the world becomes too large to be controlled, and social actors wish to have it back to the size compatible with what one can conceive" (Castells 2001)
- “annihilation of space by time“ (Harvey 2003)
- "shifting identities of economic actors" (Yeung 2003)
- “(re/de)generation of regional identities” (Roca 2004)
- “re-territorialization” (Haesbaert 2006)
- “terraphilia” (Oliveira, et al. 2010; Roca et al 2011)
TERRITORIAL IDENTITY vs. LOCAL-GLOBAL NEXUS

European Union

- “Europe of the Regions”
- Territorial identity
- Competitive local development

“The affirmation of identity is as an asset, a strong axis in development policies of a Europe of the Regions. It is necessary to value the promising elements and neutralize those that inhibit or downgrade the territorial identity.”

Commission Européenne 1994
TERRITORIAL IDENTITY vs. LOCAL-GLOBAL NEXUS

Portugal

• “Local cultural identity must be operationalized into a development resource (...) The strategy of local development must appreciate the ancestral typicality as a means of encouraging further evolution of new local innovations.” (Albino 1997)

• “While adopting cosmopolitan values, the protection of cultural identity is a conditio sine qua non further development of the Portuguese economy and society…”

   (Ministry of Planning 1999)
TERRITORIAL IDENTITY vs. LOCAL-GLOBAL NEXUS

Portugal

Academic, political and media pro-identity discourse claims for:

• Curtailing profanation, degradation and waste of the uniqueness of places;
• Valorising local cultural identity as a resource for local and regional development;
• Engaging people in protection of natural environment, cultural heritage and other distinct features of the geographic space of residence, work and leisure.
TERRITORIAL IDENTITY vs. LOCAL-GLOBAL NEXUS

Portugal

Nevertheless, there is growing evidence of the losses in local identity features:

- progressive reduction of ecological and demographic sustainability of rural areas;
- deterioration of social and economic fabric and autonomy at the local level;
- chaotic land use and blatant visual pollution;
- fierce competition for physical and social space between local(ized) and global(ized) agents of environmental, economic and cultural change.

Examples:

- substitution of terraced vineyards and of mixed cropping patterns by “more competitive” agricultural production techniques;
- adoption of consumer models that favour concentration of commercial activities at the expense of traditional retailing;
- abandonment of social values such as inter-generational solidarity and growing solitude and exclusion as commonly assumed social patterns.
POLICY AND PLANNING CHALLENGE

Why is there such a gap between the pro-identity claims and anti-identity reality?

Probable causes:

• diversity of meanings attributed to the notion of territorial identity and hence ambiguity of interpretation of its importance to local/regional development;

• predominance of top-down policy decisions, based on macroscopic interpretations of the realities in the field;

• unawareness, or negligence, of the role of development agents within the local-global nexus.
POLICY AND PLANNING CHALLENGE

Can development planning contribute to the (re)affirmation of territorial identity?

Policy-relevant answers call for:

- empirical records and assessment of the identity features;
- recognition of interests, attitudes and deeds amongst the agents of local/regional change;
- Integration of macroscopic and participatory scientific research as part of the strategic planning, policy design and project programming and implementation.

Thus, the real challenge is to transform the concept of territorial identity into an analytical category.
THE IDENTERRA MODEL

The IDENTERRA Model is conceptual-methodological framework for the operationalization of the notion of territorial identity by means of:

- detection of the territorially anchored and/or intrinsic phenomena and processes, and their disaggregation into measurable elements;

- integration of the macroscopic and participatory research approaches and methods, and their translation into bottom-up driven policy and planning procedures; and

(Roca & Roca, 2007)
“SPATIAL FIXES”

Natural heritage

All elements and objects that constitute natural environment of a territory.

Population

All spatial distribution and structural features of the people who are permanently and/or temporarily present in a territory.

Economic heritage

All objects of the created environment (i.e., modified nature and built environment) intended for production, distribution and/or consumption of tangible goods and services (i.e., those related to the satisfaction of physical human needs) in a territory.

Cultural heritage

All objects of the created environment (i.e., modified nature and built environment) intended for production, distribution and/or consumption of intangible goods and services (i.e., those related to the satisfaction of spiritual human needs) in a territory.
The IDENTERRA Model

“SPATIAL FIXES”

Natural heritage

Population

Economic heritage

Cultural heritage

“SPATIAL FLOWS”

Nature

Society

Economy

Culture

Activities, relations and meanings within horizontal and vertical networks and systems which determine functioning of Nature, Society, Economy and Culture.
Sets of spatial fixes which constitute natural (primary or modified, preserved or degraded, etc.) and cultural (agricultural, industrial, rural, urban, mixed, etc.) landscapes

Sets of spatial flows which determine the use and management of spatial fixes within the horizontal and vertical networks and systems of Nature, Society, Economy and Culture.

The IDENTERRA Model
Sets of spatial fixes and flows that characterize a geographic space

Uniqueness of a geographic area in terms of landscape and lifestyle features
OBJECTIVE TERRITORIAL IDENTITY

Visible and non-visible, material and immaterial fixes and flows that are recordable and verifiable through data and/or images.

SUBJECTIVE TERRITORIAL IDENTITY

Spatial fixes and flows that are reflected in knowledge, attitudes and practice of the actors of environmental, social, economic and cultural change.
The materialization of the pretended identity contributes to the creation of a new objective territorial identity.
The IDENTERRA Model

**OBJECTIVE TERRITORIAL IDENTITY**

**SUBJECTIVE TERRITORIAL IDENTITY**

**TOPOPHILIA**

“The affective bond between people and a place or setting”

(Tuan 1974)
The sense of topophilia changes with the (dis)integration of places and regions in the context of globalized economy and culture.

**TOPOPHILIA**

It reflects asymmetries in power-relations among agents of change.
However, topophilia is a static and passive concept, i.e., it is time-wise limited and neutral to environmental, social, economic and/or cultural change.

In fact, it lacks a development-related component.
OBJECTIVE TERRITORIAL IDENTITY

SUBJECTIVE TERRITORIAL IDENTITY

TERRAPHILIA

Affective bonds between people and a territory that induce action in favor of development.

(Oliveira et al. 2010; Roca et al. 2011)
Affective bonds between people and a territory that induce action in favor of development.

(Oliveira et al. 2010; Roca et al. 2011)
MACROSCOPIC AND PARTICIPATORY RESEARCH: METHODS AND RESULTS
MACROSCOPIC ANALYSIS

The method:

Collection of the available indicators that characterise specific spatial fixes and flows

NUTS III “OESTE”:
121 PARISHES
(12 counties)

1999-2001 (situation)
1991-2001 (dynamics)

Thematic Cartography
Cluster Analysis “Nearest Neighborhood”
Cluster analysis
Type 1
URBAN FIXES / AGITATED FLOWS
37 parishes

A weak presence of part-time farmers; a positive rate of change of second homes and the highest increase in inter-county interactions, together with high population densities, reflect the highest levels of urbanisation.

This is corroborated by indicators such as the highest proportion of young population, the strongest demographic growth and the highest proportion of single-parent families.
Cluster analysis
Type 2
**RURBAN FIXES / INTENSIFIED FLOWS**

27 parishes

A weaker presence of farmers with completed secondary education; families constituted of only one elderly person; areas under bushes and forests.

**Increased integration of urban areas into rural areas which are undergoing economic and cultural transformation**: higher rates of increase in inter-county interaction, the young/old ratio of active population and of those with completed secondary education.
Cluster analysis
Type 3

RURAL FIXES / CRYSTALIZED FLOWS

57 parishes

Higher proportion of land under bushes and forests (without any crops) and a lower rate of change of secondary homes; the lower levels of education of the population, lower inter-municipal interaction and a lower presence of foreigners in the total population; population ageing, lower levels of motorization, stronger presence of elderly living alone, and high percentages of areas under permanent crops.
Cluster analysis

Type 1

URBAN FIXES / AGITATED FLOWS

Type 2

RURBAN FIXES / INTENSIFIED FLOWS

Type 3

RURAL FIXES / CRYSTALLIZED FLOWS
PARTICIPATORY ANALYSIS

The method:

“KAP / Terraphilia” Workshops, aimed at exploring local development agents’ knowledge, attitudes and practice (KAP) related to the (re)valorization of landscape- and lifestyle-related territorial identity features.
Four “KAP / Terraphilia” Workshops held in parishes of the Oeste Region that, according to the results of the macroscopic analysis, are representative of the spatial and temporal reality within the counties of Torres Vedras, Peniche, Óbidos and Cadaval.

Collaborating institutions

- Association for the Promotion of Rural Development of Oeste
- Association for the Development of Peniche
- Agency for the Development of the Oeste Region

47 participants

- balanced distribution by sex and age;
- 66% born in Oeste and 81% residents of Oeste;
- 62% with high education, mostly in Soc. Sciences;
- 70% work and reside in same locality;
- high diversity of professions and responsibilities

- A representative sample of development agents
- Major interest in, knowledge about and assessment of territorial changes
“KAP / Terraphilia” Workshops

Retrospective/prospective diagnostics regarding lived vs. pretended territorial identity

- inventorization of “most important” positive (“desirable”) vs. negative (“unwanted”) identity features:
  - classification of identity features by
    - duration (“traditional” vs. ”recent”),
    - stability (“vanishing” vs. ”resistant”), and
    - expectations (“optimism” vs. ”pessimism”) about their evolution;

- definition of development stakeholders’ responsibility;
- prioritisation of problems;
- consensual proposals for policy solutions, projects/actions and agents.

(Oliveira, Roca, L eitão, 2010)
### POSITIVE IDENTITY FEATURES: CONSENSUAL PRIORITIES FOR LOCAL DEVELOPMENT

<table>
<thead>
<tr>
<th>LANDSCAPES &amp; HISTORIC HERITAGE</th>
<th>Rich and well preserved natural and cultural heritage, both material and immaterial.</th>
</tr>
</thead>
<tbody>
<tr>
<td>NATURAL ENVIRONMENT</td>
<td>Healthy natural environment with protected areas.</td>
</tr>
<tr>
<td>“QUALITY OF LIFE”</td>
<td>Amenities related to the lack of urban stress, natural landscapes and the local community values).</td>
</tr>
<tr>
<td>RURALITY</td>
<td>Still present traditional bucolic atmosphere).</td>
</tr>
</tbody>
</table>
## NEGATIVE IDENTITY FEATURES: CONSENSUAL PRIORITIES FOR LOCAL DEVELOPMENT

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Economic Development</strong></td>
<td>Lacking social care, professional training, information and employment.</td>
</tr>
<tr>
<td><strong>Social Development</strong></td>
<td>Weak road accessibilities. Low supply of health, education and training services.</td>
</tr>
<tr>
<td><strong>Infrastructure and Public Services</strong></td>
<td>Low levels of education and skills; School dropouts; Diminished traditional productive activities conducive to opportunities for innovative and value added employment.</td>
</tr>
<tr>
<td><strong>Human Capital Development and Traditional</strong></td>
<td>Loss of voluntarism in civic and professional associations.</td>
</tr>
<tr>
<td><strong>Productive Activity</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Associativism</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Pretended Territorial Identity and Development: Actions

<table>
<thead>
<tr>
<th>Positive and Negative TI &amp; Development Priorities Issues</th>
<th>PROPOSED ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic development (-)</td>
<td>Human capital development</td>
</tr>
<tr>
<td>19</td>
<td>10</td>
</tr>
<tr>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>15</td>
<td>3</td>
</tr>
<tr>
<td>12</td>
<td>5</td>
</tr>
<tr>
<td>9</td>
<td>7</td>
</tr>
<tr>
<td>TOTAL Nº OF REFERENCES</td>
<td>53</td>
</tr>
</tbody>
</table>
### Proposed Actions

<table>
<thead>
<tr>
<th>Action</th>
<th>Local administration</th>
<th>Local associations and other non-profit institutions</th>
<th>Central administration</th>
<th>Schools and Training Centres</th>
<th>Firms and entrepreneurs</th>
<th>Others</th>
<th>Individuals</th>
<th>Economic associations</th>
<th>Media</th>
<th>TOTAL Nº OF REFERENCES</th>
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</thead>
<tbody>
<tr>
<td>Human resources development</td>
<td>8</td>
<td>5</td>
<td>10</td>
<td>10</td>
<td>5</td>
<td>4</td>
<td>6</td>
<td>1</td>
<td>2</td>
<td>51</td>
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<tr>
<td>Employment creation</td>
<td>3</td>
<td>2</td>
<td>7</td>
<td>7</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>26</td>
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<tr>
<td>Infrastructure and public services</td>
<td>9</td>
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<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>22</td>
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<tr>
<td>Valorisation of natural environment</td>
<td>6</td>
<td>6</td>
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<td>2</td>
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<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>21</td>
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<tr>
<td>Dissemination and awareness creation</td>
<td>6</td>
<td>1</td>
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<td>2</td>
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<td>1</td>
<td>1</td>
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<td>16</td>
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<tr>
<td>Promotion of collective and social services</td>
<td>3</td>
<td>9</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>16</td>
</tr>
<tr>
<td>Promotion of tourism industry</td>
<td>3</td>
<td>6</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>Restoration and valorisation of built heritage</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td></td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td>9</td>
</tr>
<tr>
<td>Associations (management and organization)</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>Spatial planning and management</td>
<td>2</td>
<td>2</td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>TOTAL Nº OF REFERENCES</td>
<td>45</td>
<td>36</td>
<td>28</td>
<td>24</td>
<td>16</td>
<td>14</td>
<td>11</td>
<td>9</td>
<td>5</td>
<td>188</td>
</tr>
</tbody>
</table>
A Consensual Perception Coefficient was calculated for every development priority issue by pondering the dispersion among their respective Evolution Scores, as shown in the following formula:

\[
c_i = \left[ \frac{\sum_{j=1}^{n} p_{ij} - \left( \frac{n}{\sum_{j=1}^{n} n} \right)^2}{\frac{1}{\sum_{j=1}^{n} n} \times 100} \right]
\]

where
- \( c \) – the value of the Consensual Perception Coefficient for every priority issue \( i \);
- \( p \) – the Evolution Score attributed to every priority issue \( i \) by every participant \( j \);
- \( n \) – the number of times a priority issue is referred to and assessed by participants.

As a rule, the smaller the value of the coefficient, the higher the level of consensus among the participants in terms of the importance (negative or positive) they attributed to every priority issue for future development of their locality and/or region.
The following can be concluded from the results of KAP/Terraphilia Workshops:

(i) from the structural point of view, conclusions obtained in the KAP workshops were **validated by a control group** (Regional Congress of Oeste);

(ii) generally, there is **greater consensus about the negative aspects of territorial identity**, suggesting that social and economic development issues, as well as the loss of traditional productive activities, are the most unanimous points of preoccupation;

(iii) regarding the positive aspects of territorial identity, the **values of the consensus coefficient are balanced around all of the considered aspects**;

(iv) as to the **proposed actions**, the generalized consensus is not so evident, and it is quite clear that **as the level of the consensus decreases, the disagreement about proposed actions increases**.
The KAP/ Terraphilia Workshops revealed the nature of transition from topophilia to terraphilia among LDAs.

“We love the territory on which we live because it provides us, in spite of the economic problems, a beautiful landscape and a valuable heritage, as well as high-quality social relations [TOPOPHILIA].”

“In order to solve the problems that we jointly identified, we trust that the promotion of professional training and higher qualifications, with the combined assistance from the State and the Third Sector, should be a good strategy for local development based on economic and social valorisation of natural and cultural heritage [TERRAPHILIA].”
WHY TERRAPHILIA?

The promotion and activation of terraphilia may be important in the process of identification and assessment of strategically relevant elements for local and regional development, such as:

- sense of belonging to a territory;
- territorial attractiveness.
“TERRITORIAL BELONGING”

The implementation of development strategies aimed at valorization of local identities should rely on the strengthening of the sense of territorial belonging, in order to:

- promote environmental and socio-cultural consciousness;
- encourage protection of natural and cultural heritage;
- improve social relations and community spirit;
- facilitate efficiency and effectiveness of local institutions;
- reinforce self-respect and feeling of security and satisfaction.

The sense of territorial belonging could be strengthened on the basis of empirically verified knowledge and understanding of how different agents

- define and interpret the space of their residence, work and/or leisure;
- identify themselves with that space, and how would they like to change it.
“TERRITORIAL ATTRACTIVENESS”

Development agents, especially those responsible for territorial development strategy design, spatial organization and management, should

- assess the “magnetism” of places and regions and promote its sustainability;
- define elements of territorial attractiveness that are vanishing, evaluate their relevance, actual and potential, and promote their revalorization;
- explore potentials for the introduction of new elements of territorial attractiveness and stimulate their constitution;
- provide support to the public policies and investments projects that are adjusted to territorial economic and cultural specificities.


THANK YOU FOR YOUR ATTENTION!