

ESPON Programme

Tender

2005.ESPON.1.4.2

„Preparatory Study on Social aspects of
EU territorial development“

PART I – TECHNICAL DOSSIER

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1. RESEARCH BACKGROUND AND CONTEXT

1.1 European context and ESPON

This chapter elaborates our understanding of the background and the context of the “*Preparatory Study on Social aspects of EU territorial development*” in order to build a framework for the more operative sections in this document.

We regard the ESPON Project 1.4.2. as a spatial-related answer to an evolution of key policy documents on the European level and therefore shortly highlight this European background:

The relaunch of the Lisbon Strategy, as adopted at the Spring Summit on 23 March 2005, refocuses its priorities on growth, jobs as well as on environment and a sound social network. One of the main goals is to provide sustainable welfare for all citizens living in the European Union, including the creation of attractive areas for business development and for daily life. Hence sustainable welfare is recognised as a basis for Europe’s competitiveness.

In the “Revised Strategy for Social Cohesion” the European Committee For Social Cohesion (CDCS) defines social cohesion as “[...] *the capacity of society to ensure the welfare of all its members, minimising disparities and avoiding polarisation. Welfare implies not only equity and non-discrimination in access to human rights but also: (1) the dignity of each person and the recognition of their abilities and their contribution to society, fully respecting the diversity of cultures, opinions and religious beliefs; (2) the freedom of each individual to pursue their personal development throughout their life; (3) the possibility for each person to participate actively as a full member of society.*”

Although, the Lisbon Strategy has no explicit territorial dimension “sustainable welfare” does have a strong spatial aspect in terms of both the access to markets and the provision of services of general interest. The “White Paper on services of general interest” identifies under top 3.3.: “[...] *The access of all citizens and enterprises to affordable high-quality services of general interest throughout the territory of the Member States is essential for the promotion of social and territorial cohesion in the European Union, including the reduction of handicaps caused by the lack of accessibility of the outermost regions*”.¹

¹ COMMISSION OF THE EUROPEAN COMMUNITIES; COM(2004) 374 final; “White Paper on services of general interest” http://europa.eu.int/eur-lex/en/com/wpr/2004/com2004_0374en01.pdf

The concept of Territorial Cohesion includes fair access for citizens and economic operators to Services of General Economic Interest (SGEI)², irrespective of the territory to which they belong. Hence the Territorial Cohesion objective address jointly the social as well as economic and ecological dimensions of territorial development and highlights that “[...] *people should not be disadvantaged by wherever they happen to live or work in the Union*”³.

1.2 The specific focus of the ESPON 1.4.2-Project

The ESPON Programme generally aims at applied research on spatial aspects in order to provide a solid analytical basis for more integrated approaches. Consequently the ESPON Programme is focusing on the ‘added value’ of considering the territory as a unit of analysis and as basis for policy making, an approach that is likely to stimulate a better coordination of sector policies⁴.

The ESPON 1.4.2 Project is part of the Priority 1 “Thematic projects” of the ESPON Programme under the strand “Studies on New Thematic Projects”. It is a preparatory study that shall explore and evaluate the main elements of the forthcoming projects. Reflecting key policy documents on the European level (Second and Third Cohesion Reports, revised Strategy for the Lisbon/Gothenburg Agenda etc.) the ESPON 1.4.2 project explicitly focuses on “[...] *the necessity to integrate social aspects in the territorial analysis, as territorial development equally affects spaces, and people who live in these spaces, and vice versa.*”

Against the background of this overall objective, the specific research needs were described more in detail in the ToR how our analysis in the following section shows.

² SGEI refers to a service of an economic nature which public authorities provide for the benefit of their citizens via an operator acting and remunerated under a specific public service obligation (PSO), where the market will not provide it without State intervention.

³ CEC (2004): “Third report on economic and social cohesion” http://europa.eu.int/comm/regional_policy/sources/docoffic/official/reports/pdf/cohesion3/cohesion3_part1_terr_en.pdf

⁴ ESPON 2005: The ESPON Synthesis Report II – In search of territorial potentials – Midterm Results by spring 2005. Esch-sur-Alzette.

2. CONCEPTUAL APPROACH

2.1 Structuring the tender questions

The general mission to analyse ‘*social aspects of EU territorial development*’ is further concretized in the ToR. It is relevant to underline that the research needs have to be addressed in four key fields: (1) Access to social services, SGEIs and mechanisms of public transfers, (2) employment and income distribution; (3) housing and (4) education and training. For each of these research fields several questions are stated in the ToR. We have grouped these questions in ‘policy-oriented questions’ and in ‘geographic questions’. The latter refer to spatial patterns and contexts.

Table 1

Analysis of research questions and tasks according to ToR (own elaboration)

		key fields			
		social services	employment	housing	education & training
Thematic Research Question	sectoral policy	<ul style="list-style-type: none"> - Identify social mechanisms that address or avoid extreme poverty and exclusion situations and contribute to territorial cohesion. 	<ul style="list-style-type: none"> - Which groups in society are most successful in getting employed? - Which groups are excluded? - Address segregation in employment markets and gender inequality patterns 	<ul style="list-style-type: none"> - Identify how Member States address housing policies and reduce the phenomenon of spatial segregation 	<ul style="list-style-type: none"> - Show how education and training policies deal with unemployment situations and how do they adapt to the evolution of labor markets
	geography & spatial policy	<ul style="list-style-type: none"> - Address accessibility to social services and SGEI 	<ul style="list-style-type: none"> - Identify the geography of income and income flows. discuss specialization of territories, Typologies of territories 	<ul style="list-style-type: none"> - Address socio-spatial segregation patterns in rural or urban areas 	<ul style="list-style-type: none"> - Address education-related matters and problems in relation to territorial supply of education infrastructures
Primary research issues		<ol style="list-style-type: none"> (1) Implement a policy review illustrating the state of the social questions over EU25+2+2 (2) Scientific literature review (key concepts, indicators, tools methodologies), description of the main trends, dynamics and challenges in relation to specific type of territories (3) Overview on existing datasets, indicators in list, check availability (4) Formulate research proposal for future applied research. (which indicators, which methodology, which results, policy relevance) 			

We therefore conclude, that the research focus has to be put on social policy and social trends as well as their territorial outcome on European level. With regard to social policy on EU and National level we will search the answers to the following questions:

- Which EU and National policies have a critical impact on the social aspect of territorial development?
- Have member states developed specific measures to address the social aspects of territorial development?
- Which policies are relevant for the achievement of territorial and social cohesion?

'Territorial outcomes' are the result of multi-dimensional processes, that are not "sector-oriented" as on the other side 'policy' by its nature is. Territorial patterns reflect social processes as well as they have an impact on them. Consequently, priority will be put on the understanding of territorial impacts of policies. The quality of indicators has to be discussed and special attention has to be paid to the multi-dimensional character of these dynamics. We therefore identified the following questions:

- Which indicators are currently used on European level and in ESPON-projects to track areas and regions that are lagging behind in social terms?
- Which territorial indicators could lead to typologies of territories?
- Which indicators may serve as core indicators and which one are problematic to identify the social dimension of territorial development?

Our approach may therefore be summarized in the following way: We regard territories and spatial contexts as focus of our research and we will define the success of social and spatial policies in the way in which an ensemble of such sectoral policies are affecting places and the life chances of people who live and work there.

3. Proposed Methodology, Tools and Work Packages

3.1 A short outline

The research design, methodology and tasks to be performed are intended to achieve the main purposes of the ESPON 1.4.2. preparatory study as stated in the ToR and reflected in chapter 2.1). The TPG will follow a common sequence of structuring of their work as described in the tasks of the respective Working Packages (see WP2, 3, 4, 5). Given the highly specialised character of the key thematic fields, it is of relevance to mention that the thematic survey will be examined separately by respective expert-teams. In order to take account of the multi-dimensional character of social aspects tools will be developed and implemented in order to assure the integration and coordination of the research work and to identify cross-thematic issues and effects.

Work Phase 'Structuring'

In order to guarantee a common understanding of the research work, the initial work phase (WP1) will consist in the common definition of terms and concepts and the delimitation of the tasks to be performed. **Commonly** developed tools will serve as a basis for the collection and evaluation of the data sources and indicators in the following Working Packages. The level of coordination and supervision will assure an efficient carrying out of the tasks and will **avoid the duplication of existing work**.

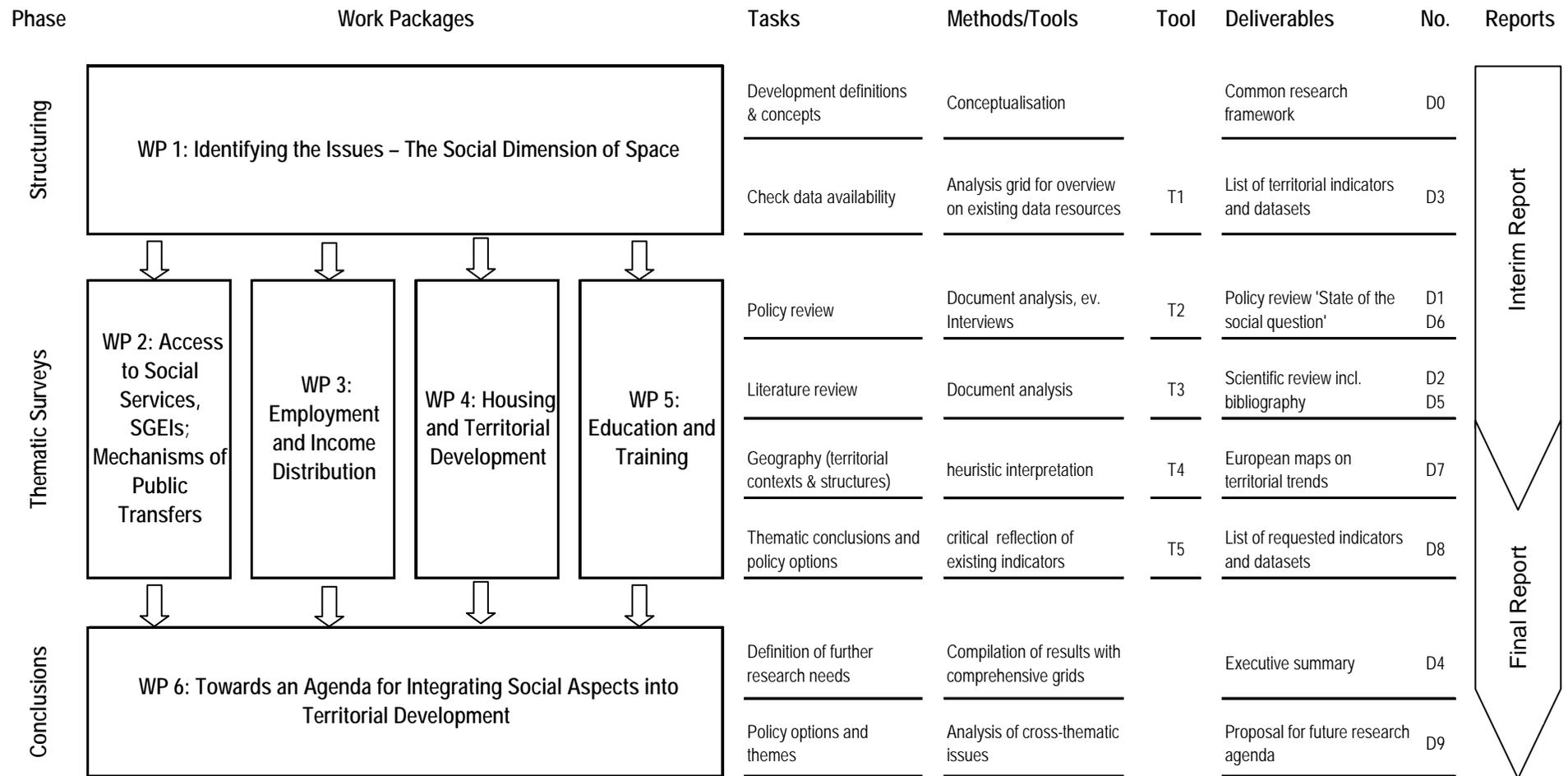
Work Phase 'Thematic Surveys'

The thematic surveys will address to the following key fields: WP2 Access to Social Services, SGEIs and mechanisms of public transfers (see chapter 3.3); WP3 Employment and Income Distribution (see chapter 3.4); WP4 Housing and territorial development (see chapter 3.5), WP5 Education and Training (see chapter 3.6). These Working Packages will elaborate a policy review on EU and National level, a literature review and the representation of territorial contexts and structures. It will therefore provide the scientific basis for the integrative concluding Work Phase.

Work Phase 'Conclusions'

The last work phase will consist in the compilation of the thematic surveys and the detection of cross-thematic issues and research gaps. This will lead to the elaboration of a proposal for a future research project (see chapter 3.7).

Figure 1: Work packages, methodological set, deliverables



Tool 1 (T1): Grid for existing data sources

Tool 2 (T2): Analysis grid for policy review

Tool 3 (T3): Guidelines for Literature Review and Bibliography

Tool 4 (T4): Evaluation Grid for Core Indicators / Requested Indicators

Tool 5 (T5): Reporting format for Thematic Conclusions

3.2 Work Package (WP) 1: Identifying the Issues – The Social Dimension of Space

Responsible Partner:	LP (PP 1/2/3)	Resources foreseen: 10 (3/3/3) pdays
Objectives	to identify the social aspects of territorial dynamics to screen concepts that treat social aspects of territorial development to set out common notions and definitions and tools to provide a common overview on data availability	
Deliverables:	Interim Report [DO, D3]	

Background

It is uncontested, that both disparities and polarisation have a considerable spatial aspect. The territory must not be regarded as a black-box, that records the outcomes of the socio-spatial trends, but it has an enforcing character. Territorial characteristics (living conditions, environmental quality, access to social services, education and jobs) do have both short- and long-term consequences for residents.

'Pockets of poverty', as often cited in European documents⁵, may not be simply regarded as undesired spatial outcomes of market failures in the field of income distribution or housing supply. 'Pockets of poverty' on an urban, regional or national scale do have an impact on the chances and opportunities of the people who live there. Social inclusion may be seen as the participation in functional systems of society (labour-market, housing-market, education, politics, social security). Consequently the structural and spatial accessibility to these functional systems is of high relevance. Normative definitions do reflect on these issues, but may provide only a starting point for the scientific analysis of the respective territorial trends.

Table 2

Integrating the social into the territorial, normative definitions

	social cohesion	territorial cohesion
positive definition	capacity of a society to ensure the welfare of all its members, minimising disparities and avoiding polarisation	the balanced distribution of human activities across the Union, is complementary to economic and social cohesion.
negative definition	when disparities get too big, cohesion at risk	Territorial cohesion includes fair access for citizens and economic operators to Services of General Economic Interest (SGEI), irrespective of the territory to which they belong

⁵ European Commission (2004) *Third Report on Economic and Social Cohesion*

Task 1

Territorial & Social (Ideas, concepts, notions, definitions)

The main purpose of the initial task will consist in the elaboration of a common understanding and a common definition of the social dimension of territorial development. The following questions have to be answered:

- What does accessibility mean in the context of housing, education, employment, social services?
- Which spatial levels are relevant?
- Which concepts and theories track social aspects of territorial development in the different key fields?
- Are there meta-theories that may be appropriate to integrate the research findings between the thematic fields?

In operational terms this Working Package will break down the research questions to the level of the key thematic fields. The following tools will be developed for the Thematic Surveys:

- Tool 1 (T1): Grid for existing data sources
- Tool 2 (T2): Analysis grid for the policy review
- Tool 3 (T3): Guidelines for the literature review and bibliography
- Tool 4 (T4) Grid for the collection and evaluation of Indicators
- Tool 5 (T5): Reporting Format for the Thematic Conclusions

The conceptualisation of the whole work programme will be done in an interactive participative form, in order to fine-tune the overall framework and to meet the requirements of the four thematic fields.

Task 2

Data Availability

The degree of availability of data has been intensively investigated throughout the European Union. In order not to duplicate work our respective analysis will therefore be based on the experience of various existing sources from ESPON projects (see sources mentioned in the description of WP 2, 3, 4, 5 and Table 4 'ESPON projects as potential information sources and networking partners') and as well as from other information sources. However, data availability differs substantially throughout the European Union. In our research work we will investigate also on shortcomings and data-gaps.

For this purpose existing studies and ESPON documents will be screened and evaluated in relation to their relevance for social aspects of EU-territorial development. A grid for the analysis of data availability (Tool 1) will be commonly developed, implemented and updated throughout the research process. This will provide a sound basis for the identification of core indicators and requested indicators.

3.3 Work Package (WP) 2: Thematic Survey – Access to Social Services, Services of General Economic Interest and Mechanisms of Public Transfers

Responsible Partner:	Partner n.1	Resources foreseen: 36 pdays
Objectives	<p>to present an overview of existing research work and policies in the field of social services with European focuses</p> <p>to present definitions of appropriate concepts, typologies, proposals for indicators and relevant datasets regarding social services</p>	
Deliverables	Interim Report [D1, D2], Final Report [D6, D5, D7, D8]	

Background

Regions and cities with e.g. limited availability of essential services, high unemployment, a biased income distribution, bad housing etc. run a high risk of developing pockets of poverty and social exclusion.⁶ It is difficult to break the vicious circle once it has begun to spin.

Accessibility does not only mean *geographical distances*, *public transport* or accessibility to a service through the *telecom and ICT infrastructure*; accessibility is also about how many persons who are *covered by a social insurance schemes* or social policy. One of the most effective ways of achieving social protection is through public transfer schemes, .e.g. unemployment schemes, sickness schemes and pension schemes. The accessibility to public transfers can differ for different sub-groups, e.g. physics, gender, socio-economic status, civil status, ethnicity and region of residence.

⁶ European Commission (2004) *Third Report on Economic and Social Cohesion*

Task 1

Policy Review

The policy review aims at identifying key policy goals and mechanisms, and pose key challenges and questions to be dealt with in the future in order to contribute to the further achievement of territorial and social cohesion objectives.

As main areas of social policy that have to be investigated in this respect we will investigate on health/medical services, day-care-facilities for children and elderly care as well as the area of social insurance.

Task 2

Literature Review

Due to the multi-dimensional character of this thematic field we have identified the topic of 'Health' as a good starting point: it derives from many sources; medical treatment is only one part of the story. Health includes (i) the overall living standard, including the level of income and its distribution; (ii) individual choices such as diet and life style; (iii) the general external environment, e.g. pollution and hazards; (iv) the individual environment, such as the type of job, or having a job; (v) the quality and availability of health care; (vi) a person's inheritance.⁷ The analysis on health will focus on (i), (ii), (iv) and (v) mentioned above.

Accessibility to day-care for children and elderly care is just as important social services as e.g. health/medical care and social insurance coverage. If demanded for, day care for children can give mothers a possibility of working; two incomes in a household decrease the poverty risk and contribute to a less biased income distribution. Besides day-care, the possibility for parental leave is also an important social service. Furthermore, both the number of 65+ years old and the share of population 65+ years old will increase. Depopulation in some areas is caused by, on one hand, the general trend of ageing, but also, on the other hand, because young people, and especially young women, leave the rural and/or peripheral areas, leaving the parents behind.⁸ This group is already today facing a high poverty risk in the EU countries.⁹

Poor relief and social assistance is the final social security net for the citizens in a society, today and historically, indicating shortcomings in the social security. In some countries this final security net is financed and organised by national authorities, in some countries by regional

⁷ Barr, N. (1998) *The Economics of the Welfare State*. Oxford University Press

⁸ This was discussed in the Final Report by ESPON project 1.1.4 on the *Spatial Effects of Demographic Trends and Migration*.

⁹ European Commission (2004) *Third Report on Economic and Social Cohesion*

authorities, and in some countries by local authorities.¹⁰ Depending on the accessibility to social services, different sub-groups of the population can be protected from/exposed for poverty in various degrees.

In the case of telecom infrastructure and transport, the results from ESPON projects 1.2.1, 1.2.2 and 1.2.3 can be used when analysing accessibility. Some results from ESPON projects 1.1.1, 1.1.2, 1.1.3 and 1.1.4 can possibly also be included in the discussion on accessibility of social services.

Task 3

Geography of Social Services

The work package will construct typologies for the major indicators used and use maps to illustrate the geography of social services and the general spatial trends regarding social services.

A typology covering most social services, public transfers and social exclusion will be discussed. According to the typology of welfare regimes constructed by Esping-Andersen¹¹, *Denmark, Finland, the Netherlands, Norway and Sweden* belong to the Social-democratic welfare regime; *USA, Canada, Japan, Australia and Switzerland* belong to the Liberal welfare regime. In the Conservative welfare regime Esping-Andersen place countries like *Austria, Belgium, France, Germany and Italy*. *Great Britain* is not placed in this typology since its welfare system contains three equal parts of the three welfare regimes.

Most of the New Member Countries were included by the Socialist welfare regime, a welfare regime which has dissolved during the transition to a market economy. In the debate it has been noted that *Czech Republic, Hungary, and Slovenia* are developing towards the Liberal welfare regime, while *Poland and Bulgaria* are headed towards the Conservative welfare regime. The Social-democratic welfare regime seems to attract *Estonia, Latvia and Lithuania*

Esping-Andersen's famous typology with three welfare regimes was constructed 1989, and later supplemented. Although he has been criticised¹² he is still the one who has produced the best

¹⁰ Eardley et al. (1996) *Social Assistance in the OECD Countries: Synthesis Report*, London/HMSO: Department of Social Security. Research Report No.46

¹¹ Esping-Andersen, G. (1989) "The Three Political Economies of the Welfare State", *Canadian Review of Sociology and Anthropology* Vol. 26:2; Esping-Andersen, G. (1990) *Three Worlds of Welfare Capitalism*. Polity Press. A similar typology has later been made by Hicks, A. & Kenworthy, L. (2002) *Varieties of Welfare Capitalism*. Luxembourg Income Study Working Paper No. 36.

¹² His main critics have argued that he has not taken the gender issue into consideration, and that his model is focussed on the national level; regional differences are ignored. Furthermore, his typology is static and ignores the fact that the welfare regimes have developed or have been terminated by the transition from an industrial to a post-

explanation for the social differences in Western World. Much has happened since 1989, especially the fall of the Communist regimes in Eastern Europe. A hypothesis which will be tested is that Esping-Andersen's typology with three welfare regimes, in spite of the changes, is still valid. Efforts will be made to see if countries like *Greece, Luxembourg, Slovakia, Romania, Cyprus* and *Malta* can be put into this typology.

Task 4

Conclusions and Tentative Policy Options

An overview of existing datasets will be provided, as well as a list of relevant indicators and suggestions on how to collect the needed data, how to harmonise and manipulate the data and indicators. Task 4 basically aims at checking the availability of data and present conclusions on the quality and comparability of datasets covering different administrative levels and times scale.

In the case of non-harmonised indicators and data however needed for an appropriate study on social services, a list of relevant indicators (if any) will be provided to facilitate future research in the field.

This project is a "preparatory study" on the territorial dimension of social services, aiming to find areas and/or issues worth analysing more thoroughly. This study will find these areas, issues and problems and elaborate proposals for future applied research.

3.4 Work Package (WP) 3: Thematic Survey – Employment and Income Distribution

Responsible Partner:	Lead Partner	Resources foreseen: 30 pdays
Objectives	to provide a framework for the analysis of spatial patterns and their impact on employment opportunities on EU level to identify concepts that treat the relation spatial segregation and economic polarisation to identify relation between income distribution and territorial specialisation	
Deliverables	Interim Report [D1, D2], Final Report [D6, D5, D7, D8]	

industrial society. A number of sub-typologies, e.g. the "South European" type, can be identified, which is something Esping-Andersen also has been criticised for.

Background

Employment (resp. unemployment) is a core issue on the political agenda in Europe since by the early 1990s unemployment throughout Europe has risen to unprecedented levels and concern over the economic well-being of less-skilled workers and tackling long term unemployment have become prominent policy contents. Still there is hardly any other socio economic phenomenon which is so strongly debated and so weakly embedded in sound economic theory¹³ than unemployment and employment policies. This weak back-up of policy by scientific evidence plus the fact that labour market policies are still among the most nationally heterogeneous policy fields in a unified Europe causes the problem of a lack of normatively driven analysis of spatial patterns of employment. In other words research results within the ESPON programme (see Task 2 below) have been attempts to positively describe and assess employment situations in Europe rather than supporting the social policy agenda by providing spatial typologies which would link the employment situations with the underlying causes and drivers of unemployment (especially for the low-skilled, young and/or female work force).

Therefore in order to fulfil objective 1 of this WP – i.e. “*to provide a framework for the analysis of spatial patterns and their impact on employment opportunities on EU level*” – it will be necessary to combine modern labour market theory with spatial clustering and regional/national regulatory peculiarities (in respect of labour market policies [e.g. unemployment insurance benefits] as well as standard economic performance [e.g. real interest rates]). Furthermore in respect of access to jobs WP 3 will have to rely on results from WPs 2 (Access to Social Services and Mechanisms of Public Transfers) and 5 (Education and Training), which will provide input on major drivers of employment and employment opportunities.

The second part of the thematic survey – i.e. the issue of income distribution – is to be understood as an assessment of the relation between income distribution and territorial specialisation (“*geography of income and income flows*” – ToR). First of all it has to be pointed out that the term “*income distribution*” in economic theory describes the disparities of different income levels within the population rather than the distribution of different types of income (e.g. pensions, private/public workers,...). The standard income distribution term will be needed and assessed in order to foster modern labour market theory hypothesis¹⁴. The intention to prepare the grounds for a future typology of territories on the basis of “residential” or “productive” character seems to be legitimate in the light of the ESDP and the intention of the specialisation

¹³ For critical overviews of the existing labour market theory see e.g. Rothschild K. (1990): *Arbeitslose: Gibt's die?* – Metropolis Verlag; Marburg or
Howell D.R. (2003): *The Micro-Foundations of High Unemployment in Developed Countries: Are Labour Market Rigidities the Problem?* in Harris J.M., Goodwin N.R. (eds.): *New Thinking in Macroeconomics – Social, Institutional and Environmental Perspectives*; Edward Elgar; Cheltenham

¹⁴ This hypothesis states that the high level income groups are equally affected by unemployment than the low income groups – though with some time gaps (“out-pricing of less skilled workforce”).

of territories. Still from a social policy perspective such a specialisation – thought to its extreme – could also lead to socio-economic counterproductive effects (see e.g. the specialisation on pensioners of the Tampa Bay region in Florida undermining the social cohesion of the regional and national population). Therefore we will try to combine the results of this survey with the results of WP 2 and some social base line indicators picturing social conditions of families and family structures.

Task 1

Policy Review

As stated above labour market policies are still among the most heterogeneous policy fields in Europe – leading to the necessity to identify the national labour market support logic and to point out the differences not only in respect of support measures but also in respect of national differences within common measures (e.g. the unemployment benefit duration rates in Europe range between 1,2 to 4 years in specific countries¹⁵).

It will therefore be intended to set up an analysis grid which will include the standard labour market support measures and labour market parameters (unemployment insurance benefits, qualification measures, labour market expenditure, employer coordination and union coordination) in order to be able to point out differences and territorial specialisations.

Apart from this rather standardized approach to employment policy the member states have to respond to challenges related to territorial processes caused by the uneven regional development both on the national and European level. Disparities in demographic trends, remoteness and economic specialisation of regions have lead to specialised national approaches which need to be evaluated. In the new member states as well as in states facing political changes (e.g. the unification of Germany) the political transition has lead to economic shock phenomena which strongly influenced labour market conditions and policy responses.

Task 1 will therefore examine these policy responses and their effects in the concerned areas.

¹⁵ Data from various OECD documents presented in Howell D.R., Duncan M., Harrison B. (1998): Low Wages in the US and High Unemployment in Europe: A Critical Assessment of the Conventional Wisdom; Centre for Economic Policy Analysis Working Paper No. 5; New School for Social Research.

Task 2

Literature Review

The issue of employment and especially the analysis of spatial patterns of employment opportunities and access to jobs is pictured by a rather complex body of literature. Basically two streams could be distinguished:

1. Status oriented (scientifically positive) literature:

Standard socio-geographical literature tries to describe employment and its link to labour market conditions by picturing them in the specific spatial context they are found in. The ESPON projects 1.1.4. (THE SPATIAL EFFECTS OF DEMOGRAPHIC TRENDS AND MIGRATION), 2.4.2. (INTEGRATED ANALYSIS OF TRANSNATIONAL AND NATIONAL TERRITORIES BASED ON ESPON RESULTS), 3.3. (TERRITORIAL DIMENSION OF THE LISBON/GOTHENBURG PROCESS) among others will provide results in this respect. Still these assessments will not allow for a identification of the unemployment problems in general and those of the specific groups (youth, long term and women) in particular. Therefore a second stream of literature will have to be considered.

2. Labour market theory oriented (scientifically normative) literature:

In order to get a grip on the causes and drivers of unemployment and the underlying correlations between (spatial, socio-economic, policy) framework conditions and the labour market it will be necessary to go through more theoretical economic literature. There are basically two schools of thought to be identified in modern labour market theory:

- a) Traditional labour market theory which is oriented upon a general market equilibrium model and follows the "Trans-Atlantic Consensus" resp. the "Unified Theory"¹⁶ basically assumes that unemployment derives from labour market rigidities and thus correlating labour market assessment with institutional and/or structural barriers to labour markets.
- b) "New" labour market theory which is oriented upon the search of more convincing drivers¹⁷ of unemployment and the more "systemic" approach of explaining labour market conditions also with external (environmental) drivers (e.g. policy shocks)¹⁸.

¹⁶ For more details see e.g. Krugman P. (1994): Past and Prospective Causes of High Unemployment; in The Federal Reserve Bank of Kansas (ed.): Reducing Unemployment: Current Issues and Policy Options; Kansas City
Atkinson A. (1998): The Distribution of Income in Industrialized Countries; paper presented at the symposium "Income Inequality: Issues and Policy Options; the Federal Reserve Bank of Kansas City, Jackson Hole, Wyoming

¹⁷ Phelps E.S. (1972): Inflation Policy and Unemployment Theory; London
E.g. real interest rates, investment level changes over time, sector differentiation of labour markets

Apart from these economic theory oriented inputs the cross cutting issues with WP 3 and 6 (access to infrastructure, education and training) will have to be checked for they correlation with employment and employment opportunities as well.

All these approaches deduced from literature will have to be combined in task 2 to receive a picture of information needed in the spatial context in order to arrive at operational typologies of employment and access to the labour market.

Task 3

Geography of Income and Income Flows

As pointed our above the distribution of income and income disparities will be assessed and combined with other information in task 2. As for the intended analysis of the specialisation of territories depending on the components of the income (pensions, private/public workers, active/retired people) it will be possible to critically discuss and evaluate classifications and existing typologies. Still we think it will be better (especially in the light of the strategic Lisbon/Gothenburg goals "...the EU to be *capable of sustainable economic growth with more and better jobs and greater social cohesion...*") to combine this data with focused information on the social cohesion itself (e.g. family structures, data from WP 3 relating to health and elderly care). Consequently we will be able to draw a differentiated picture of the geography of real income and income distribution.

Task 4

Conclusions and Tentative Policy Options

An overview of existing data sets will be provided, as well as a list of relevant indicators and suggestions on how to collect the needed data, if necessary harmonize and manipulate the data and indicators. Task 4 basically aims at checking the availability of data and present conclusions on the quality and comparability of data sets covering different administrative levels and time scales.

In the case of non-harmonized indicators and data however needed for an appropriate study on employment and income distribution, a list of relevant indicators will be provided to facilitate future research in the field.

¹⁸ for more details see e.g. Howell D.R. (2003): The Micro-Foundations of High Unemployment in Developed Countries: Are Labour Market Rigidities the Problem? in Harris J.M., Goodwin N.R. (eds.): *New Thinking in Macroeconomics – Social, Institutional and Environmental Perspectives*; Edward Elgar; Cheltenham
Blanchard O., Wolfers J. (2000): The Role of Shocks and Institutions in the Rise of European Unemployment: The Aggregate Evidence; *Economic Journal* 110, March: C1-C33

3.5 Work Package (WP) 4: Thematic Survey – Housing and territorial development

Responsible Partner:	Partner n.2	Resources foreseen: 30 pdays
Objectives	<p>in-depth examination of existing policy documents, completed researches and available data resources on the interplay of housing and territorial development</p> <p>summarizing the territorial trends in housing, presentation of social challenges of housing processes and related policy responses</p> <p>presentation of a set of indicators on housing in the EU25+2+2 area that are in compliance with national policies, and strategic documents of the EU</p> <p>formulating recommendations for future housing research topics based on the outcomes of the WP4</p>	
Deliverables	Interim Report [D1, D2], Final Report [D6, D5, D7, D8]	

Background

The pressure on housing systems and land markets has been emerging due to demographic changes, changes in household structure, economic changes, and changes of welfare systems. The housing policies and housing markets in Member States have gone through radical changes in the last decades partly to react to these processes. On one hand, a gradual integration process can be detected in housing policies and housing markets in EU countries, like the integration of the financial markets, increasing dominance of the homeownership and a general shifts from the supply side subsidies towards the demand side subsidies. On the other hand, the regional and territorial processes result increasing disparities in housing (both housing quality and affordability) at inter-regional and intra-regional levels. The risks of increasing regional and intra-regional disparities in terms of access to housing and level of housing services could be a challenging issue for the EU cohesion policy.

These disparities are of special importance concerning the territorial cohesion of the EU, which is gaining more importance as reflected in the new Community Strategic Guidelines.

Task 1

Policy Review

National, regional and local level housing policies have been struggling for defining appropriate tools for the changing demand and dynamic processes on the housing markets and for the problems related to social stratification and disintegration. The European Union recognized the significance of decreasing the differences in access to housing and in quality of housing between the different regions. Because of the imperfect transmission of the economic development to the regional housing markets, the house price disparity and differences in affordability tends to be higher than the differences in economic potential, which makes the process of European unification (free movement of people and capital) more difficult. Despite the fact that housing policy is an important element in addressing regional differences and promoting social and economic cohesion, EU has tended not to be directly involved in housing policy. However, indirectly, EU sector policies had substantial effects on integration of housing policies. The links between the regional development and housing policy should be addressed in the research.

The member states have to respond to the challenges related the territorial processes caused by the uneven regional development both on national and European level. The wide disparities in demographic trends (fast increase in developing region and decreasing population in declining regions) are accompanied by the growing house price differences and affordability problems on one hand and worsening housing quality on the other hand. Intra-regional segregation as a consequence of the economic, demographic and social factors has become an important social issue. The housing policy of the members states have tried to develop different strategies managing the problems of the social segregation which need to be evaluated.

Housing in the new member states and candidate countries is more critical, as the housing has been a neglected area of social policy in the political and economic transition.

Task 1 of the Work Package will examine policy responses and their effects in the concerned areas, covering both urban and rural spaces in the European region. It will reflect the aim of integrating housing policies, and the targets that have been formulated in compliance with regional development.

Task 2

Literature Review

In the past 15 years, numerous researches have been undertaken to address social issues of housing and put it in the context of territorial development in order to map the constraints of access to housing and to affordable housing, explore regional disparities in housing prices, their effects on national housing markets, and the influence of housing finance systems on regional development.

Recently, the trend of the integration in housing policies has become a new research direction. Its importance in the free movement of labor is unquestionable. More recently, mobility is seen as one of the key issues in economic development of the EU. A further great amount of literature has been dealing with the constraints and facilitating elements of mobility, which are strongly related to housing markets, tenure structures and affordability issues. Urban and spatial development schemes are strongly influenced by the various ways of migration, which has again an affect on housing markets.

Task 2 of the Housing Work Package is to explore on one hand the surveys and researches undertaken in order to investigate the social impacts of housing and to provide for decent information on territorial trends in housing. On the other hand, it will focus on researches on mobility on the EU level, the interregional state level, the intraregional level, in urban areas and it will examine studies on suburbanization.

Task 3

Overview of existing datasets on Housing

With the growing importance of the social dimension in the European Union, and the development of statistical data collection, more refined information has been made available for comparative researches. The basis for such comparisons are mostly harmonized data, nevertheless, there is only small proportion on housing data that would sufficiently reflect the territorial and regional trends in the EU 25+2+2 area. After an overview of available territorial housing indicators and datasets at NUTS 2/3 level, listing of European harmonised data (and referring to non-harmonized available others), the aim of this research phase is to evaluate the data resources according to their reliability, administrative level, time scale and availability.

Task 4

Conclusions and Tentative Policy Options

Based on a summary of the territorial trends in housing, presentation of social challenges of housing processes and related policy responses, it will recommend general objectives for further housing policy development.

WP Housing and territorial development will formulate those fields in housing research that should be further investigated and deliver a set of key indicators, where the collection and aggregation needs further refinement.

3.6 Work Package (WP) 5: Thematic Survey – Education and Training

Responsible Partner:	Partner n.3	Resources foreseen: 30 pdays
Objectives	Identify the relevance of education and training to achieve social cohesion in EU; Identify the regional differences in educational levels and its relation with territorial competitiveness; Identify the regional differences of education and training and its relations with the Lisbon Agenda goals	
Deliverables	Interim Report [D1, D2], Final Report [D6, D5, D7, D8]	

Background

Attainment levels on population education have improved in the last decades. Despite the effort to achieve more harmonized national educational systems, we are far from that. Nevertheless, there are deep territorial differentiations on education and qualification levels, not only related with a different educational system, but also related with lacks of educational infrastructures and social disturbance revealed by several indicators, namely an early school leave, as had been pointed in different documents, as the reports on social situation in EU reports in the last years.

Task 1

Policy Review

Task 1 is related with policy review on education and training. This task will permit to identify and compare differential education facilities and educational systems, at a national and regional level. Key policies goals will be identified in order to understand the contribution to the further achievement of territorial and social cohesion objectives. The objectives of the European Employment Strategy and the Lisbon Agenda will lay the ground for the policies analysis. The

relation with the others work packages will be developed, namely with WP3, related to employment and income distribution.

Task 2

Literature Review

Education and training will deal a central role to achieve the objectives of Lisbon Agenda and also Gothenburg Agenda. Higher qualifications tend to reduce the risk of unemployment, increase income and improve competitiveness, and that will contribute to social cohesion. The evolution of the employment market will set aside the more unqualified workers, which will generate the necessity of lifelong learning in order to correct mismatch between the demand and supply of labour force and consequently to prevent unemployment. Territorial differentiation on education and training actions are clear. Northern European countries have a higher participation level and the contrast is very strong with other member states. On other hand, there are also a clear differentiation according to gender and age.

The connections with the other WP will be fundamental, specially the relations with WP3, employment and income distribution. Another relevant aspect is the ageing process in Europe and it's consequences to the labour market. The Lisbon Agenda points to an increase of old age employees and the increase of female activity rate. These facts are relevant to lifelong learning as well to improve education and qualification of younger labour force.

Task 3

Geography of Education and Training

The work package will overview and collected data and indicators for EU25+2+2, at different appropriate geographical levels. An evaluation of data resources according to its reliability, geographical scale and availability will be made in this task.

Territorial differentiation was already showed in the finals and preliminaries results of several ESPON projects. Related with the present theme we can identify strong connections with ESPON 1.1.4 project, in order to understand the needs on education and training of an elder population with extend active age and the consequent employment market restructuring; ESPON 2.1.2, in order to understand the relation with R&D policies at a regional/local level and its relations with education and training; and ESPON 3.3 project, in order to understand the relation of education and training with territorial competitiveness. Maps will illustrate the geography of education and training, and the general trends regarding this theme.

Task 4

Conclusions and Tentative Policy Options

Task 4 will provide a critical overview of the existing datasets and indicators on education and training, as well a list of other data and indicators needed to develop further work.

As a preparatory study, it will summarize the territorial trends on education and training, highlight the challenges of education process and report the policies responses. This study will elaborate proposals to future applied research on this theme.

3.7 Work Package (WP) 6: Towards an Agenda for Integrating Social Aspects into Territorial Development

Responsible Partner:	LP (PP1/2/3)	Resources foreseen: 8 (4/1/4) pdays
Objectives	to identify research gaps to give evidence on availability/non availability of data to evaluate indicators for the territorial analysis of social situations to propose options for cross analyses and territorial typologies of ESPON findings to elaborate a proposal for a future applied research project	
Deliverables	Final Report [D4, D9]	

Background

The key challenge of this working package consists in the elaboration of a proposal for future applied research on social aspect of territorial development in the European Union. The proposal therefore has to take account of current EU Strategic Documents and National Policies. This research proposal has to pay specific attention to the objectives of territorial and social cohesion and has to operationalize these terms for applied research.

Task 1

Further Research Needs

In practical terms the first task is intended to compile, harmonize and conclude the findings of the Thematic Surveys. On the basis of the completed finalized tools, (Tool 1, 2, 3, 4, 5) a comprehensive overview should be elaborated. This will allow us, to identify data gaps with respect to the elaboration of useful territorial indicators in the social field and to identify ESPON territorial indicators that are capable of tracing the social dimension of territorial development

This overview will serve for the scoping of the future research needs with respect to territorial development and its social dimension. The proposed issues will therefore concentrate on problems detected in measuring and mapping these trends, as well as in proposed methods. In the second task, the policy-oriented challenges will be envisaged.

Task 2

Policy Options across the Themes

Taking account of all research finding, the policy relevance of a research project on the social dimension of territorial development will be elaborated in a final concluding task. This proposal will give evidence, how such a project can provide an important contribution

- to a clearer understanding of the relation between territorial and social cohesion
- to address the territorial context of sustainable welfare
- to solve of social problems on different spatial scales.
- to take account of problems related to the Enlargement and Integration process on the European level.

On the basis of the material elaborated in the thematic surveys, particular attention will be paid to suggest useful concepts for addressing the multi-dimensional character of social aspect in territorial development, to structure the research questions for future applied research and to propose indicators and methods that will help to develop further knowledge on the identified issues and to give answer to the questions raised.

3.8 Work Package (WP) 7: Project Management, Reporting and Communication

Responsible Partner:	LP (PP 1/2/3)	Resources foreseen: 16 (5/1/3) pdays
Objectives	Organisation, implementation and control of project management	
Results to be expected	Smooth working flow between the partners Delivery of co-ordinated content and timely reports High level quality of project outputs and results	
Deliverables	Interim Report [D0, D1, D2, D3], Final Report [D4, D5, D6, D7, D8, D9]	

3.8.1 Project Management and Communication within the TPG

The Lead Partner (LP) will act as study co-ordinator and perform the work in close co-operation with the other project partners. The Lead Partner will activate consultation and validation mechanisms between the project partners and other relevant actors. The overall team management will be guided by the managing director.

In order to guarantee a smooth working flow and co-ordination of the project, a kick-off meeting will provide an opportunity to discuss the content and to co-ordinate and organise further work. The kick off meeting aims to start research activities and co-ordinate the work for the Interim Report. Furthermore the Lead Partner will take the role to clarify responsibilities of the individual partners in advance and co-ordinate organisation and collection of data, dissemination of information and also give feed-back.

Table 3 gives an overview of the responsibilities of each partner in the respective task, as it is foreseen presently. The envisaged timetable for the whole project duration and all tasks are depicted in Figure 2.

Project management includes also the organisation of the whole financial reporting obligations twice a year – to instruct project partners and to deliver the necessary information to the Co-ordination Unit on time. The Lead Partner is also in the role to clarify questions and problem related to financial reports with the individual partners or the Co-ordination Unit.

Communication within the TPG will be largely electronically, via a common project-server the documents and other information will be permanently accessible for all TPG members. Thus e-mail sending and administration of draft version can be kept to a minimum.

Table 3

Division of Tasks

		LP	PP1	PP2	PP3
WP 1	Identifying the Issues (The Social Dimension of Space)				
1.1	Territorial & Social (Ideas, concepts, notions, definitions)	R	C	C	C
1.2	Data Availability	R	C	C	C
WP 2	Thematic Survey: Social Services				
2.1	Policy Review		R		
2.2	Literature Review		R		
2.3	Geography of Social Services		R		
2.4	Conclusions and Tentative Policy Options		R		
WP 3	Theme Employment & Income Distribution				
3.1	Policy Review	R			
3.2	Literature Review	R			
3.3	Geography of Employment & Income Distribution	R			
3.4	Conclusions and Tentative Policy Options	R			
WP 4	Theme Housing				
4.1	Policy Review			R	
4.2	Literature Review			R	
4.3	Geography of Housing			R	
4.4	Conclusions and Tentative Policy Options			R	
WP 5	Theme Education & Training				
5.1	Policy Review				R
5.2	Literature Review				R
5.3	Geography of Education & Training				R
5.4	Conclusions and Tentative Policy Options				R
WP 6	Towards an Agenda for Integrating the Social into Territorial Development				
6.1.	Further Research Needs	R	C	C	C
6.2	Policy Options across the Themes	R	C	C	C
WP 7	PM, Reporting and Communication				
7.1	PM +TPG Communication	R			
7.2	ESPO Network	R			
7.3	Reporting	R	C	C	C

R ... Responsible Partner

C ... Contributing Partner

Figure 2: Timetable

Project Months		09/2005	10/2005	11/2005	12/2005	01/2006	02/2006	03/2006	04/2006	05/2006	10
		1	2	3	4	5	6	7	8	9	
task											
WP1	Identifying the Issues (The Social Dimension of Space)										
1.1	Territorial & Social (Ideas, concepts, notions, definitions)										
1.2	Data Availability										
WP2	Thematic Survey: Social Services										
2.1	Policy Review										
2.2	Literature Review										
2.3	Geography of Social Services										
2.4	Conclusions and Tentative Policy Options										
	Thematic Survey: Employment & Income Distribution										
3.1	Policy Review										
3.2	Literature Review										
3.3	Geography of Employment & Income Distribution										
3.4	Conclusions and Tentative Policy Options										
	Thematic Survey: Housing										
4.1	Policy Review										
4.2	Literature Review										
4.3	Geography of Housing										
4.4	Conclusions and Tentative Policy Options										
	Thematic Survey: Education & Training										
5.1	Policy Review										
5.2	Literature Review										
5.3	Geography of Education & Training										
5.4	Conclusions and Tentative Policy Options										
	Towards an Agenda for Integrating the Social into Territorial Development										
6.1	Further Research Needs										
6.2	Policy Options across the Themes										
	PM, Reporting and Communication										
7.1	PM, TPG Communication	K.O.					PR				PR
7.2	ESPO Networking										
7.3	Reporting					IR				FR	

K.O. kick off meeting
 PR progress report
 IR interim report
 FR final report

3.8.2 Communication and Networking within ESPON

The LP of this project will participate in the ESPON seminars held twice a year and will assist to prepare content for these seminars. At these seminars the progress of the project will be presented. The Lead Partner of the TPG is also in charge of disseminating feed-back from the Monitoring Committee and Co-ordination Unit to the other project partners and will take over a mediation function if problems occur or consensus is needed.

The TPG will establish direct contacts with other ESPON projects of high relevance for the themes of this project in order to make efficient use of already existing knowledge. This co-ordination may consist in a) information exchange b) use of common data resources c) direct contact with ESPON project partners d) meetings with projects partner or contact points.

The specific fields for thematic coordination will be identified in the 'conceptualisation phase' of WP2. However, the description of the Working Packages already identifies first potential projects and thematic strands, that may be of high interest for further co-ordination (see Table 4).

Other institutions and organisations dealing with interesting relevant studies and datasets will also be contacted.

Table 4

ESPON projects as potential information sources and networking partners

No.	Titel	WP2 Access to Social services	WP3 Employment & Income Distribution	WP4 Housing	WP5 Education & Training
1.1.	Polycentric Development and urban rural-relations				
1.1.1	The role, specific situation and potentials of urban areas as nodes of polycentric development	++			
1.1.2	Urban-rural relations in Europe	++		+	+
1.1.3	Particular effects of enlargement of the EU and beyond on a polycentric spatial tissue with special attention on discontinuities and barriers	++	++	++	+
1.1.4	The spatial effect of demographic trends and migration	++	++	++	++
1.2.	Access to infrastructure and knowledge				
1.2.1	Transport services and networks: territorial trends and basic supply of infrastructure for territorial cohesion	++	++	++	++
1.2.2	Telecommunication and energy services and networks: territorial trends and basic supply of infrastructure for territorial cohesion The role, specific situation and potentials of urban areas as nodes of polycentric development	++	+	+	+
1.2.3	Identification of spatial relevant aspects of the information society	++	++	0	++
1.3.	Natural and cultural heritage				
1.3.1	The spatial effects and management of natural and technological hazard in general and in relation to climate change				
1.3.2	Territorial trends in the management of the natural heritage				
1.3.3.	The role and spatial effects of cultural heritage and identity				
2.1.	The territorial effects of sector policies				
2.1.1.	Territorial impact of the EU transport and TEN policies	+	0	0	
2.1.2	Territorial impact of the EU research and development policy	+	++	0	++
2.1.3	The territorial impact of CAP and rural development policy	0			
2.1.4	Territorial trends of energy services and networks and territorial impact of EU energy policy	0			
2.1.5	Territorial Impacts of European Fisheries Policy				
2.2.	Structural Funds and related funds				
2.2.1	The territorial effects of the Structural Funds	0	+	0	
2.2.2.	Territorial effects of the 'Aquis Communautaire', Pre-accession Aid and Phare/Tacis/Meda Programmes		+	0	
2.2.3	Territorial Effect of Structural Funds in Urban Areas	+	++	++	+
2.3.	Institutions and Instruments of spatial policies				
2.3.1	The application and effects of the ESDP in the member states	0		0	
2.3.2	Governance of territorial and urban policies from EU to local level	0	0	0	0
2.4.	Filling gaps and new policy impacts projects				
2.4.2	Integrated territorial analyses based on ESPON results	0	++	0	0
3	Co-ordinating and cross-thematic projects				
3.1.	Integrated tools for European spatial development	+	+	+	+
3.2	Spatial scenarios and orientations in relation to the ESDP and EU cohesion policy	0	0	0	0
3.3	Territorial dimension of the Lisbon/Gothenburg process	++	++	++	++
3.4.1	Europe in the World				

++ highly interesting for co-ordination, information exchange, data-sources and networking

+ interesting for co-ordination, information, data-sources

0 potentially interesting for co-ordination & information

3.8.3 Reporting and Deliverables

According to the Terms of References ESPON 1.4.2 the Transnational Project Group will deliver one Interim Report on 31 December 2005 and one Final Report on 31 May, 2006. These reports will be designed and drafted as integrated papers on the findings from the thematic working packages and will reflect the joint knowledge of the whole TPG. Derived from the logic of project, the given time frame and from description in the ToR the two reports will cover at least the following topics:

Interim Report

(D0)	Presentation of the scope of the project and detailed work plan	<i>see chapter 3.2</i>
(D1)	First results of the policy review presenting the main policy orientation at EU25+2+2-level and possibly also at National level	<i>see description task 1 in chapter 3.3, 3.4,3.5, 3.6</i>
(D2)	First results of the review of existing scientific surveys integrating social issues and territorial development objectives with EU focus	<i>see description task 2 in chapter 3.3, 3.4,3.5, 3.6</i>
(D3)	A detailed list of (1) existing territorial indicators and datasets covering EU25+2+2 at NUTSII/III-level; (2) proposals for maps on the basis of the harmonised data collected	<i>see description in task 3 and 4 of chapter 3.3, 3.4,3.5, 3.6 and examples in chapter 3.5</i>

Final Report

(D4)	An executive summary of the main results, list of core indicators on the social dimension of territorial development	
(D5)	Final results of the scientific literature review presenting identified territorial trends In 1) social services 2) employment and income distribution 3) housing, 4) education and training	<i>see description task 2 in chapter 3.3, 3.4,3.5, 3.6</i>
(D6)	Final results of the policy review at EU and National level	<i>see description task 1 in chapter 3.3, 3.4,3.5, 3.6</i>
(D7)	European maps displaying major territorial trends	<i>see propositions in chapter 3.5</i>
(D8)	Final list of requested indicators and related data	<i>see description of "non available indicators" in task 3 and 4 of chapter 3.3, 3.4,3.5, 3.6 and examples in chapter 3.5</i>
(D9)	summary of the proposal for future applied research	<i>see description in chapter 3.7</i>

3.9 List of Proposed Territorial Indicators and Maps

In this section first suggestions for territorial social indicators from the thematic Working Packages are collected. Those indicators, that are based on existing and harmonised regional data from EU sources, and have not yet been displayed on EU29 level, may be tested in maps. The indicators refer to different territorial units. The list is to be considered a first outline, that does not yet cover all aspects and fields:

Territorial Indicator	Health personnel (physicians/doctors) per inhabitants and region 2000/2002
Datasets used (available/not available)	Eurostat (available).
territorial reference	NUTS 2. No data for Slovenia
Interpretation quality:	indicates the accessibility to and territorial distribution of health personnel in EU29.
Territorial Indicator	Number of hospital beds per region and per 100 000 inhabitants 2000/2002
Datasets used (available/not available)	Eurostat (available).
territorial reference	NUTS 2. No data for Denmark and Luxembourg
Interpretation quality:	indicates the accessibility to and territorial distribution of hospital beds in EU29.
Territorial Indicator	At-risk-of-poverty rates 2002/2003
Datasets used (available/not available)	Eurostat (available)
territorial reference	All EU29 countries at national level
Interpretation quality:	The map will indicate the territorial distribution of the share of persons being at-risk-of-poverty in EU29.
Territorial Indicator	Public expenditure on family/children 2001/2002. Euro per inhabitant
Datasets used (available/not available)	Eurostat (available)
territorial reference	For EU28 countries at national level, except Cyprus
Interpretation quality:	indicates the accessibility to and territorial distribution of facilities/services for families and children in EU29.
Territorial Indicator	Public expenditure on social exclusion 2001. Euro per inhabitant
Datasets used (available/not available)	Eurostat (available)
territorial reference	For EU28 countries at national level, except Cyprus
Interpretation quality:	indicates the public efforts to prevent social exclusion and the territorial distribution of public actions against social exclusion in EU29.
Territorial Indicator	Public expenditure on sickness/health care 2001. Euro per inhabitant
Datasets used (available/not available)	Eurostat (available)
territorial reference	For EU28 countries at national level, except Cyprus
Interpretation quality:	indicates public efforts on sickness and health care, and the territorial distribution of public actions/services on sickness and health care in EU29.

Territorial Indicator	Housing affordability indicator I. (house price to income ratio)
Datasets used (available/not available)	Housing Statistics for European Union, ECE Bulletin of Housing and Building Statistics and selected Country Profiles on the Housing Sector UN-HABITAT housing indicator and urban indicators and other specific sources (research documents)
territorial reference	Available at national levels and for selected urban centres
Interpretation quality:	The indicator used for measuring housing affordability, however its value is influenced by macroeconomic factors as well.
Territorial Indicator	Housing affordability indicator II. (rent to income ratio)
Datasets used (available/not available)	Housing Statistics for European Union, ECE Bulletin of Housing and Building Statistics and selected Country Profiles on the Housing Sector UN-HABITAT housing indicator and urban indicators
territorial reference	National levels and for selected urban centres
Interpretation quality:	Housing affordability indicates the differences in access to housing in the rental sector. This is a factor, which is a cause of the territorial processes (uneven economic development, migration) and in the same time it is its consequence.
Territorial Indicator	Tenure structure – share of social housing
Datasets used (available/not available)	Housing Statistics for European Union, ECE Bulletin of Housing and Building Statistics and selected Country Profiles on the Housing Sector UN-HABITAT housing indicator and urban indicators, CECODHAS
territorial reference	National levels and for selected urban centres
Interpretation quality:	The regional differences in tenure structure and its change is an important indicator of the housing policies at national level.
Territorial Indicator	Lifelong Learning (2002)
Datasets used (available/not available)	Eurostat (missing data: Norway, Switzerland, Czech Republic, Slovakia)
territorial reference	NUTS 2
Interpretation quality:	The map will indicate the adult participation in education and training
Territorial Indicator	Educational Attainment Levels (2001)
Datasets used (available/not available)	Eurostat (available).
territorial reference	NUTS 2. (missing data: Norway, Switzerland)
Interpretation quality:	The map will indicate the population education level (lower secondary education, or below; upper secondary education; tertiary education level)
Territorial Indicator	Early School Leavers (2002)
Datasets used (available/not available)	Eurostat (available)
territorial reference	EU29 countries at national level except for Bulgaria and Switzerland
Interpretation quality:	The map will indicate the territorial differentiation on early abandon on education and training actions.

4. COST OF THE STUDY

The costs of the study are in coherence with point 8 of the ToR (p.3) and are represented in the following tables.

- Costs per Partner and Category
- Personnel Costs per Partner and WP
- Workdays per Partner and WP
- Person days per task

Costs per Partner and Category (amounts in euro)

PP	1-PM	2-staff	3-subcontracting	4-travel	5-meetings	6-publicity	7-equipment	8-consumables	TOTAL
LP	3.000	32.000		2.500					37.500
PP1		24.000		1.500					25.500
PP2		13.500		1.500					15.000
PP3		20.000		1.500					21.500
TOTAL	3.000	89.500	-	7.000	-	-	-	-	99.500

Total Cost of the Study: € 99.500

Personell Costs per Partner and WP (amounts in euro)

PP	WP 1	WP 2	WP 3	WP 4	WP 5	WP 6	WP 7			TOTAL
LP	5.000		15.000			4.000	8.000			32.000
PP1	1.500	18.000				2.000	2.500			24.000
PP2	1.000			11.500		500	500			13.500
PP3	1.500				15.000	2.000	1.500			20.000
TOTAL	9.000	18.000	15.000	11.500	15.000	8.500	12.500	-	-	89.500

Workdays per Partner and WP

PP	WP 1	WP 2	WP 3	WP 4	WP 5	WP 6	WP 7			TOTAL
LP	10	-	30	-	-	8	16			64
PP1	3	36	-	-	-	4	5			48
PP2	3	-	-	29	-	1	1			34
PP3	3	-	-	-	30	4	3			40
TOTAL	19	36	30	29	30	17	25			186

Person days per task

Person days	64	48	34	40
task	LP	PP1	PP2	PP3
WP1	10	3	3	3
1.1	7	2	2	2
1.2	3	1	1	1
WP2		36		
2.1		8		
2.2		9		
2.3		11		
2.4		8		
WP3	30			
3.1	7			
3.2	8			
3.3	9			
3.4	6			
WP4			29	
4.1			7	
4.2			7	
4.3			8	
4.4			7	
WP5				30
5.1				7
5.2				8
5.3				9
5.4				6
WP6	8	4	1	4
6.1.	4	2	1	2
6.2	4	2		2
WP7	16	5	1	3
7.1	5	2	1	2
7.2	5			
7.3	6	3		1