



**A new start for the Lisbon Strategy**  
*Working together for growth and jobs*

**METREX Response Discussion Note**  
*The contribution of spatial planning and development*

for consideration by the METREX Network  
and the METREX Managing Committee  
at its Nürnberg Meeting 15-18 June 2005

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## **PREFACE**

The Lisbon strategy is not,

- A concept for professional economists
- An ambition for the Brussels establishment working alone
- A narrow perspective relating only to economic change
- An ambition that can be viewed as inconsistent with sustainable development
- A concept that ignores the social effects of economic growth

The Lisbon Strategy, when properly presented and understood, is

- A method of shaping the future of Europe
- A strategy to maintain and enhance the quality of life for the citizens of Europe
- Needed to exploit the new opportunities of the knowledge-based economy
- A recognition that maintaining employment and improving living standards on the one hand, and competitiveness on the other, calls for a new dynamic
- A strategy to promote synergies between economic, social and environmental measures
- A strategy to build on the past success of the European Union
- Capable of sustainable economic growth with more and better jobs and social cohesion

*The European Economic and Social Committee (EESC) Opinion of 27 October 2004*

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## **1 Purpose of this Discussion Note**

The European Council, when it meets in March 2005 under the Luxembourg Presidency, will consider a Communication from the European Commission *Working together for growth and Jobs – A new start for the Lisbon Strategy* (COM (2005) 24). The Communication is supported by a Companion document setting out an Action Plan, which includes some 70 individual measures. The European Economic and Social Committee (EESC) and the Committee of the Regions (COR) have both published Opinions on the mid-term review of the Lisbon Strategy. These key documents can be accessed, in languages, through the Europa web site at [www.europa.eu.int](http://www.europa.eu.int) and have also been placed on the METREX web site at [www.eurometrex.org](http://www.eurometrex.org), in EN, for the convenience of METREX Members. The key points are summarised in the Background on page 5.

- **The Commission’s Communication and the Opinions of the EESC and COR all refer to the need for social partners (such as METREX) to engage with the renewed Lisbon Agenda and to consider the contribution that they can make. The purpose of this Discussion Note is to provide a basis for the consideration of a METREX Response to the Commission, the EESC and the COR, at the forthcoming METREX Nürnberg Meeting from 15-18 June 2005 (see METREX web site for details).**

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## **2 Background**

### **The renewed Lisbon Strategy**

*Five years ago European Heads of State and Government committed themselves to making the European Union the most dynamic and competitive knowledge- based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion, and respect for the environment (by 2010). Executive Summary of the Communication from President Barroso, in agreement with Vice-President Verheugen. Working together for growth and jobs. A new start for the Lisbon Strategy. COM (2005) 24. 2 February 2005.*

*Europe faces two enormous challenges – increasing global competition and a rapidly ageing workforce. In the face of these challenges, if Europe is to safeguard and strengthen its distinctive economic and social model, it must adapt. The status quo is not an option. EU Press Release on Facing the Challenge, the report of the High Level Group on the Lisbon Strategy led by Wim Kok.*

Facing the Challenge called for determined action by Member States, the European Commission, the European Parliament, and European social partners. European social partners were asked to *take up their responsibility and actively participate in the implementation of the Lisbon strategy.*

### **Working together for growth and jobs. A new start for the Lisbon Strategy**

*A more attractive place to invest and work*

- Extend and deepen the internal market (Action Plan 1)
- *Improve European and national regulation* (Action Plan 3)
- *Ensuring open and competitive markets inside and outside Europe* (Action Plan 2)
- *Expand and improve European infrastructure* (Action Plan 4)

*Knowledge and innovation for growth*

- Increase and improve investment in Research and Development (Action Plan 5)
- Facilitate innovation, the uptake of ICT and *the sustainable use of resources* (Action Plan 6)
- *Contribute to a strong European industrial base* (Action Plan 7)

*Creating more and better jobs*

- *Attract more people into employment and modernise social protection systems* (Action Plan 8)
- *Improve the adaptability of workers and enterprises and the flexibility of labour markets* (Action Plan 9)
- Investing more in human capital through better education and skills (Action Plan 8)

Executive Summary of the Communication from President Barroso, in agreement with Vice-President Verheugen. COM (2005) 24. 2 February 2005.

*(Key issues for Metropolitan regions and areas shown in italics)*

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**Lisbon Action Plan**

The Lisbon Action Plan contains some 70 individual measures, which are largely concerned with creating a favourable social and economic climate for growth and jobs. They address the financial and regulatory context (the software), within which private and public/private partnerships can develop the dynamic and knowledge-based economy sought by the Lisbon Strategy. In this sense they are part of the wider context within which the function of metropolitan spatial planning and development can make its contribution.

However, there are a number of measures in the Action Plan that are of direct relevance to spatial planning and development. These include,

- Impact Assessments of development
- the TEN's (including the Quick Start) Programme
- logistics and inter-modality
- promoting local and regional clusters (innovation and knowledge-transfer)
- promoting inclusive labour markets

**European Economic and Social Committee (EESC) Opinion** (see also Preface)

The EESC Opinion is strongly supportive of an integrated approach to the implementation of the Lisbon Strategy. The EESC recalls that from the outset, in 2000, it,

- *emphasised the need to actively involve the social partner and civil society with the strategy, using various forms of partnership*
- *specified that success depends primarily on private sector and public/private partnerships*
- *aimed at the balanced development of its three strands, economic growth, social cohesion and environmental sustainability, by stimulating European competitiveness and job-creation whilst at the same time building on appropriate environmental policies*

The EESC makes a number of key points in its Opinion but two are of particular relevance to the context for effective metropolitan spatial planning and development.

- *The Lisbon Strategy must be recognised for what it is, a very ambitious agenda for building a European society of prosperity, welfare, competitiveness, social inclusion and a high awareness of the environment. On this basis, it is essential to communicate more actively with social partners and organised civil society. This Lisbon Strategy has been too much identified as only an economic agenda*
- *The concept of quality (quality of goods, services, regulation, governance, employment, social relations and environment) is essential to the implementation of the strategy and should be an integral element of the annual evaluations of progress made at national and EU level*

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**Committee of the Regions (COR) opinion**

The COR Opinion is also strongly in favour of an integrated approach. The COR also makes a number of observations and recommendations that are relevant to the context for effective metropolitan spatial planning and development. The COR,

- Believes that population aging poses major challenges for the sustainability of public finances and the development of services and that this calls for effective measures for developing and encouraging people to stay in employment
- Feels that it is important to see economic, employment and social policy, environmental policy and education and research policy as integrated and complementary elements in the Lisbon Strategy to support competitiveness, economic growth and social cohesion
- Believes that in implementing the Lisbon Strategy the primary focus should be on improving employment and competitiveness
- Feels that a decentralized approach should be adopted in applying the open coordination method, thereby providing local and regional players with real opportunities to develop local and regional strategies. These strategies should be part of a national strategy.
- Considers it essential that greater importance is attached to governance in the employment strategy and that the implementation of governance be critically examined in the 2005 joint Employment Report

**European Spatial Planning Observatory Network (ESPON) Research Project 3.3**

*Territorial dimension of the Lisbon-Gothenburg strategy*

As part of its ongoing research programmes, ESPON has commissioned Project 3.3 (October 2004) to assess the territorial dimension of the Lisbon-Gothenburg Strategy. ESPON has been invited to present their draft Interim Report to the METREX Nürnberg Meeting (see [www.espon.lu](http://www.espon.lu)). It will inform member consideration of the METREX response.

**METREX Background summary**

Any summary of the extensive and detailed documentation outlined above is bound to be selective. However, there are a number of common conclusions that can be drawn and taken into consideration in the METREX response to the renewed Lisbon Strategy.

- **Achieving the goals of the renewed Lisbon Strategy will require the integrated consideration of social, economic and environmental issues at all levels of governance and balances being struck between them to achieve the most sustainable approach possible**
- **Such balances can only be struck effectively, for many strategic issues, at the metropolitan level. This requires appropriate competencies, capabilities and processes. This is the Metropolitan Dimension to European affairs that METREX has promoted and embodied in the METROPOLITAN initiative**

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**METREX projects – InterMETREX, SocioMETREX and POLyMETREXplus**

METREX has promoted the InterMETREX, SocioMETREX and PolyMETREXplus projects to support the objectives of the European frameworks for social, economic and territorial cohesion and, in particular, the European Spatial Planning and Development Perspective (ESDP) for better urban balance. The InterMETREX Practice Benchmark (2005) contains 29 individual Benchmarks of effective spatial planning and development practice, the first two of which address the issues of a Higher-level context and Integrated Strategies for the sustainable development of metropolitan areas. The SocioMETREX (2003) project is the source for the checklist in section 4 of this Discussion Note.

The METREX Practice Benchmark advocates the production of a higher-level context (Benchmark 1) and Integrated Metropolitan Strategies (Benchmark 2), both of which would then enable the production of Metropolitan Spatial Plans within a coherent and comprehensive context.

**BENCHMARK 1**

**A higher level context (for example, National Spatial Plans, or plans for States or Regions), should define,**

1. A longer-term vision for the social and economic development of the country, state or region and the role of metropolitan areas within this.
2. The demographic, migrational and sectoral economic change that such a vision implies.
3. An integrated transportation strategy for the national and regional road and rail network, national and regional ports and airports, and national and regional terminals and interchanges.
4. Investment programmes and projects for national and regional infrastructure.
5. Natural and urban heritage resources of national or regional significance

**BENCHMARK 2**

**Integrated Strategies for the sustainable development of metropolitan areas (Functional Urban Regions or Areas (FURA) of metropolitan significance) should include,**

1. An assessment of the key social, economic, environmental and spatial issues in prospect over the medium to longer-term (10-15+ years)
2. A SWOT (strengths, weaknesses, opportunities and threats) analysis based on this assessment
3. A medium to longer term Vision for the sustainable social, economic, environmental and spatial development of the FURA that will provide a clear focus for action by all stakeholders
4. Specific goals, within the Vision, reflecting the key issues in prospect, their scale and significance and how they are to be addressed
5. Sectoral and community objectives, to reflect the action and resources required to address the key issues in prospect effectively
6. Indicators for assessing progress in achieving goals and objectives on a sustainable basis
7. Procedures for monitoring and review

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- **A metropolitan response to the renewed Lisbon Strategy could include advocacy of the production of higher level contexts, at national, state or regional levels, and Integrated Strategies at the metropolitan level to ensure the vertical integration of metropolitan strategies with other levels of governance and their horizontal integration with the strategic plans of all metropolitan stakeholder interests**
- **The vertical and horizontal integration of strategies and plans is an aspect of effective governance and hence of economic competitiveness.**

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### **3 The renewed Lisbon Strategy**

Across Europe nation states have responded to the issues of global competition, an aging population and a reducing workforce through action to increase productivity and GDP.

Measures have included, for example,

- Support for parenting
- Nursery education programmes to improve the ability of children to benefit for primary and secondary education
- Improved primary and secondary education standards
- Higher proportions of students in tertiary education
- Higher proportions of young people in training
- Lifelong learning programmes
- Action against sexual and age discrimination
- Welfare to work programmes
- Improved productivity
- Support for research and development
- Support for entrepreneurship

#### **The contribution of the function of spatial planning and development**

The issue for the METREX Nürnberg Meeting is the specific contribution that the function of spatial planning and development, at the metropolitan level, can make to the Lisbon Strategy. This will include actions (see page 3) to improve the competitiveness, cohesion and quality of life within metropolitan regions and areas, for example,

- Balancing competing interests, integrating land use, transportation and infrastructure, enabling economic competitiveness, promoting social inclusion, assessing the environmental impact of development and safeguarding natural and heritage resources, through the spatial planning and development process

These balancing, integrating, enabling, assessing and safeguarding functions can form the basis of the spatial planning and development contribution to the renewed Lisbon Agenda.

However, they could also include related action to, for example,

- Promote metropolitan governance for effective spatial planning and development
- Establish bodies, agencies or companies for integrated and targeted economic, social or environmental action
- Support public/private partnerships for integrated and targeted economic, social or environmental action

The very process of producing a Spatial Strategy and Plan for a metropolitan area can assist business confidence by eliminating uncertainty about development constraints and opportunities and helping to reduce investment risk.

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**The contribution of the SocioMETREX project**

The SocioMETREX project (2004) concluded that the function of spatial planning and development could contribute to the sustainable economic, social and environmental development of European metropolitan regions and areas by assisting the,

- Maintenance of high and stable levels of economic growth
- Social progress, which recognises the needs of everyone
- Effective protection of the environment and the
- Prudent use of resources

These broad headings form the basis for the UK Governments Sustainability Indicators. They have been used as a basis on which to found the SocioMETREX checklist. This checklist also provides a starting point for the consideration of the contribution that spatial planning and development can make to the renewed Lisbon Strategy.

The SocioMETREX checklist headings relate well to the objectives of *Working together for growth and jobs. A new start for the Lisbon Strategy* (See key issues in italics on page 1) for,

- A more attractive place to invest and work
- Knowledge and innovation for growth
- Creating more and better jobs

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## **4 The contribution of spatial planning and development to the Lisbon Strategy**

### **Maintenance of high and stable levels of economic growth**

1. Accessibility to metropolitan interchanges for the modal transfer of people and goods  
*To reduce the need for road travel and to facilitate the efficient import and export of goods*
2. Effective primary transport network  
*To minimise congestion and facilitate the efficient movement of goods*
3. Good public transport to the main centres of employment  
*To widen their accessibility to the labour market*
4. Adequate economic development opportunities  
*To accommodate business needs*

### **Social progress, which recognises the needs of everyone**

5. Balanced distribution of population, housing, employment and services  
*To facilitate accessibility between activities*
6. Where there is an unequal distribution of employment and services, take action to reduce disparities  
*To make the urban area more equitable*
7. Where there is poor accessibility to employment and services, take action to improve this  
*To make the urban area more equitable*
8. Adequate housing in terms of size, tenure and affordability  
*To provide an acceptable and affordable home for every household*
9. Identify areas that suffer from multiple deprivation  
*To focus integrated remedial action*
10. Acceptable environmental standards within urban areas in terms of noise and air pollution  
*To protect and improve the health of residents and workers*
11. Provision of a linked network of open space  
*To provide access to recreational opportunities for all*

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**Effective protection of the environment**

12. Safeguard and enhance the quality and character of the landscape  
*To protect the setting of metropolitan areas*
13. Safeguard and enhance the quality and character of the urban heritage of buildings and public spaces  
*To make metropolitan areas more attractive places in which to live and work*
14. Safeguard and enhance biodiversity  
*To contribute to better ecological balance*
15. Safeguard and enhance water catchment areas  
*To maintain and improve the quality of water supplies*
16. Safeguard the capacity of flood plains from development  
*To reduce the risk of flooding*

**Prudent use of resources**

17. Maximise urban development capacity through the reuse of urban land and buildings  
*To reduce the need for urban expansion*
18. Protect high quality agricultural land from development  
*To sustain this resource for future generations*
19. The planned development of mineral extraction  
*To reduce the consumption of minerals from primary sources (optimise recycling)*
20. Within a waste management strategy of waste reduction, recycling, treatment and disposal, enable the development of waste management facilities  
*To facilitate a more sustainable approach*

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**Maintenance of high and stable levels of economic growth**

- 1 Accessibility to metropolitan interchanges for the modal transfer of people and goods**  
*To reduce the need for road travel and to facilitate the efficient import, export and distribution of goods*

Connectivity is a key economic issue within metropolitan areas. Through locational policies spatial planning can ensure that economic activities are well related to transportation interchanges and that opportunities for inter-modal connections are recognised and taken advantage of. Such opportunities could include, for example, port/rail and airport/rail connections, road/rail freight transfer/distribution, road/rail public transport transfer/connections.

- 2 Effective primary transport network**  
*To minimise congestion and facilitate the efficient movement of goods*

To be effective the primary transport network should include a hierarchy of road and rail routes, and interchanges, which allow the efficient movement and transfer of goods. Such network will need to extend, comprehensively, across a metropolitan area and then be managed to minimise congestion and the environmental impact of traffic whilst facilitating accessibility. It will include through and distribution routes leading to local access. The primary transport network can also create environmental areas within which the impact of traffic can be reduced and the environmental quality of city and town centres, residential, and historic areas can be safeguarded.

- 3 Good public transport to the main centres of employment**  
*To widen their accessibility to the labour market*

The efficient and socially inclusive working of a metropolitan labour market will depend on the ability of employees, and potential employees, to access employment opportunities. Through locational policies spatial planning can ensure that the main centres of employment, as they change and develop over time, are well related to public transport opportunities, particularly where this includes a rail network.

- 4 Adequate economic development opportunities**  
*To accommodate business needs*

The assessment of business development needs (including industrial and office needs), in the medium to longer term (5-15+ years), can be balanced with the prospective supply of development opportunities, having regard to the need to support urban regeneration and the employment needs of socially deprived areas. Whilst it is difficult to balance local labour markets with employment opportunities, it is possible to locate and distribute a range of business development opportunities, having regard to the need for economic competitiveness and social inclusion.

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**Social progress, which recognises the needs of everyone**

**5 Balanced distribution of population, housing, employment and services**  
*To facilitate accessibility between activities*

Within mature economies such as Europe spatial planning is very often primarily concerned with the management of change within urban areas. This will involve the identification of opportunities to recycle and reuse urban land and buildings. Urban extension will also be an issue where higher environmental or space standards are required to meet changing economic, commercial or residential needs. In both these sets of circumstances spatial planning can ensure that, over time, there is a balanced distribution of population, housing, employment and services. Better accessibility between activities supports metropolitan competitiveness and inclusion.

**6 Where there is an unequal distribution of employment and services, take action to reduce disparities**  
*To make the urban area more equitable*

Metropolitan social capital includes equality, where the distribution of employment and services enables social disparities to be reduced. For example, new employment development opportunities can be distributed having regard to deprived areas and services located in city and town centres that are well connected by public transport.

**7 Where there is poor accessibility to employment and services, take action to improve this**  
*To make the urban area more equitable*

Integrated spatial and transportation planning can ensure that the relationships between residential (particularly deprived) areas, employment and service (city and town centres) areas and the primary transport network are recognised. It can also then ensure that the extent and management of the network, particularly the public transport network, responds to the need for accessibility between them.

**8 Adequate housing in terms of size, tenure and affordability**  
*To provide an acceptable and affordable home for every household*

The assessment of housing development needs (including the public, private and rented sectors), in the medium to longer term (5-15+ years), can be balanced with the prospective supply of development opportunities, having regard to the need to support urban regeneration and housing needs of socially deprived areas. It is possible to balance supply and demand within local and metropolitan market areas, and to locate and distribute a range of housing development opportunities, having regard to the need for economic competitiveness and social inclusion. Adequate housing provision enables labour market flexibility.

**9 Identify areas that suffer from multiple deprivation**  
*To focus integrated remedial action*

Many European metropolitan areas, even the most prosperous, display a range of urban conditions from the highly attractive and well provided for to the multiply deprived. In a developing situation where all metropolitan areas need to become as attractive, inclusive and competitive as possible, spatial planning can ensure that urban disparities and deficiencies are recognised and addressed in an integrated way.

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**10 Acceptable environmental standards within urban areas in terms of noise and air pollution**  
*To protect and improve the health of residents and workers*

Integrated spatial and transportation planning can ensure that the environmental impact of traffic is recognised and addressed at the planning stage or reduced, over time, through the relocation or remedial measures. Strategic spatial planning can also ensure that provision is made in plans for activities that have an environmental impact even after the application of accepted environmental standards. For example, waste management plants.

**11 Provision of a linked network of open space**  
*To provide access to recreational opportunities for all*

Urban leisure now takes many forms including some which require open space and others which require urban development. Some, such as active and spectator sports, can require both together with high levels of accessibility. The relationship between urban activities and the open space networks within them, and adjoining them, is therefore complex and changing. However, the green networks of river valleys, nature reserves, woodlands, parks and open space within metropolitan areas and their surroundings are key parts of an areas environmental capital and quality. They are also important aspects of economic and social attraction.

**Effective protection of the environment**

**12 Safeguard and enhance the quality and character of the landscape**  
*To protect the setting of metropolitan areas*

Many European metropolitan areas have taken steps to safeguard and enhance their environmental quality, particularly the quality and character of the landscape within and around them. Spatial planning designations such as greenbelts and scenic areas enable a presumption against development to be sustained and provide the stability and security within which programmes of landscape enhancement can proceed with confidence. The setting of metropolitan areas is also an aspect of their social and economic attraction. They reflect a concern for quality of life.

**13 Safeguard and enhance the quality and character of the urban heritage of buildings and public spaces**

*To make metropolitan areas more attractive places in which to live and work*

The quality of urban life is reflected to a considerable extent by the quality and character of the urban heritage of buildings and public spaces. This patrimony is part of Europe's competitive advantage, if it is safeguarded and enhanced. Spatial planning can set the policy framework to encourage and support the continued active use and reuse of the urban heritage. For example, the decentralisation of urban functions and services can be controlled to support the continued vitality and viability of city and town centres.

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**14 Safeguard and enhance biodiversity**  
*To contribute to better ecological balance*

Within framework of metropolitan open space, recreation provision, scenic and landscape designations spatial planning can also safeguard and enhance bio-diversity. For example, by recognising habitats and ensuring that their ecological relationships are understood, interpreted and protected.

**15 Safeguard and enhance water catchment areas**  
*To maintain and improve the quality of water supplies*

Urbanisation has placed heavy demands on water supplies across Europe and the safeguarding of water catchment areas is a major issue. Where development is having a significant environmental effect on water resources remedial measures may be required. Spatial planning can ensure that a balance is struck between the demands of the metropolitan economy and its environmental resources, including water supply and wastewater disposal. An adequate water supply is a fundamental development resource.

**16 Safeguard the capacity of flood plains from development**  
*To reduce the risk of flooding*

Climate change is now a spatial planning issue. Metropolitan areas have become at risk from sea and river flooding, and combinations of both, as a result of deficient river management and the urbanization of flood plains. Spatial planning has a role to play in ensuring that the capacity of flood plains is safeguarded and that existing problems are not exacerbated. Good environmental and resource management of this kind is now a competitive necessity.

**Prudent use of resources**

**17 Maximise urban development capacity through the reuse of urban land and buildings**  
*To reduce the need for urban expansion*

Spatial planning at the metropolitan level is now as much concerned with managing urban change as with urban expansion. The two are clearly inter related in that the more effectively existing urban land and buildings can be recycled and reused the less urban change will need to be accommodated by urban expansion. Many metropolitan spatial plans now include an assessment of urban capacity in the medium to longer term (5-15+years) when balancing supply and demand for development. A compact, multi-purpose, well-connected urban form gives European metropolitan their special quality of life. Quality of life is a key aspect of competitiveness, as has already been mentioned.

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**18 Protect high quality agricultural land from development**

*To sustain this resource for future generations*

Despite the agricultural surpluses that have been experienced in the European Union, high quality agricultural land will remain a fundamental resource as less intensive farming practices develop. Such land has a flexibility of productive use that is a permanent economic asset. Locally sourced agricultural produce will continue to be a factor in food cultures, which are part of Europe's competitive advantage and closely related to the tourism industry. As with other environmental and productive natural resources, spatial planning can provide protective designations as well as offering alternative development opportunities that have less impact.

**19 The planned development of mineral extraction**

*To reduce the consumption of minerals from primary sources (optimise recycling)*

Spatial planning can balance the need for the extraction of minerals with the selection of the least damaging locational option and the minimisation of environmental impact. It can also optimize recycling, for example, of road surfacing materials when approving new developments.

**20 Within a waste management strategy of waste reduction, recycling, treatment and disposal, enable the development of waste management facilities**

*To facilitate a more sustainable approach*

Integrated waste management will be part of any integrated strategy for a metropolitan area. Spatial planning can contribute with the selection locations for waste management facilities that minimize environmental impact. A sustainable approach to waste management can be an aspect of economic attraction and competitiveness.

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for consideration by the METREX Network  
and the METREX Managing Committee  
at its Nürnberg Meeting 15-18 June 2005

## **5 The METREX Nürnberg spring Meeting**

The Meeting has been structured to include presentations by the key European institutions on the renewed Lisbon Strategy and its implications for Europe's metropolitan regions and areas. The Programme will also include Workshop sessions through which to explore the possible contribution of spatial planning and development to the Lisbon Strategy, as set out above. It may be that Members and participants in the Meeting will have views on modifications or additions to this initial checklist.

- **The outcome of the discussions at the Meeting might then form the basis for a METREX response to the European institutions on the renewed Lisbon Strategy, as one of the social partners**
- **It is clear that competitive metropolitan regions are characterized by effective governance and clear and integrated Visions and strategies for their futures (which usually include spatial strategies, policies, programmes and major projects), produced and implemented with the involvement and support of key stakeholders and civil society (see also page 9)**