SAT4TER

Self-Assessment Tool for Territorial Development strategies

Diving the tool

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European Commission, Joint Research Centre – Territorial Development Unit

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Integrated tools

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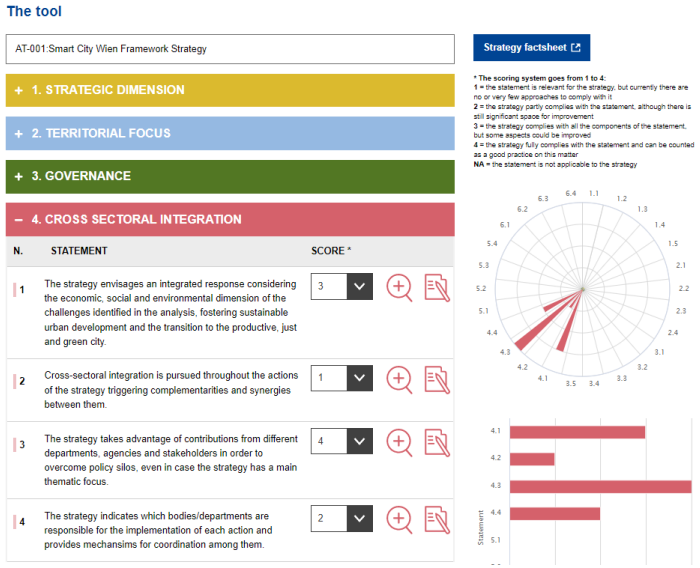
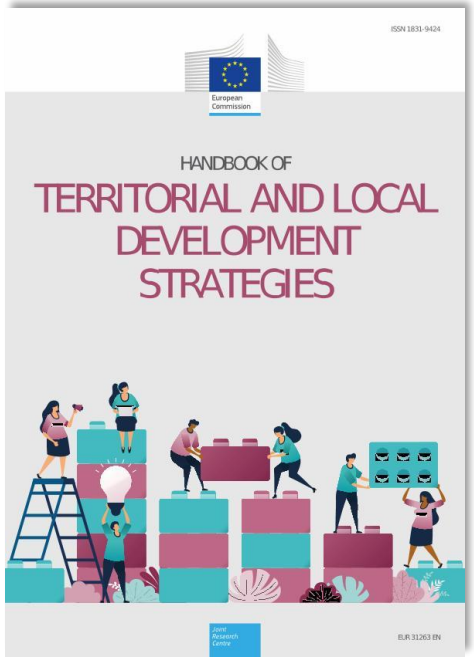


A self-assessment tool



Policy learning and methodological support to design and implement territorial development strategies in non-urban areas

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Integrated tools

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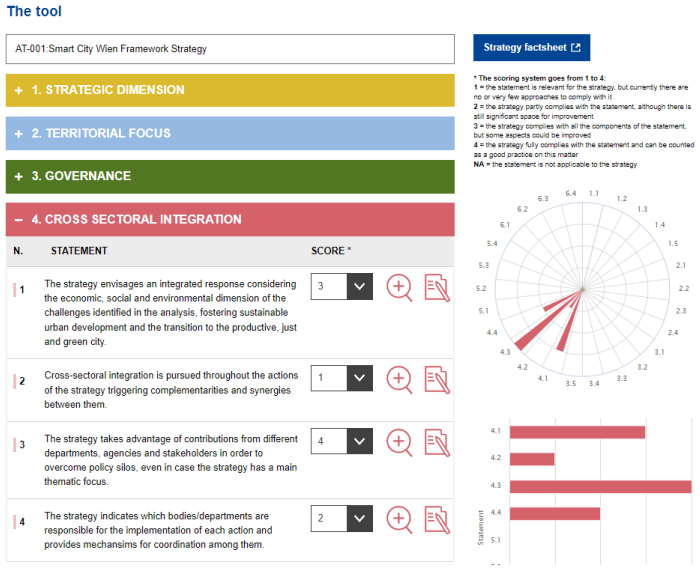

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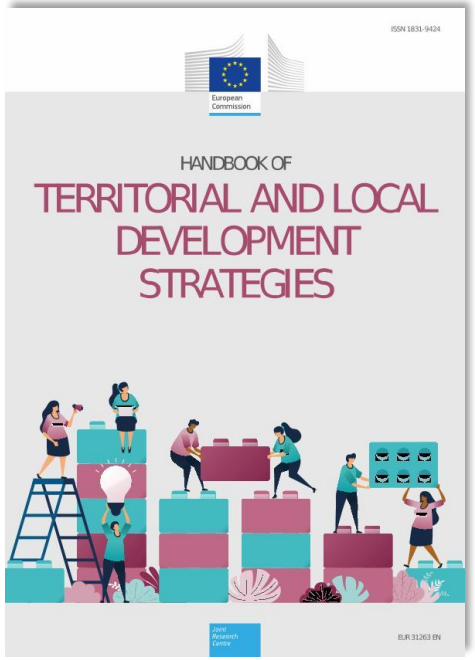

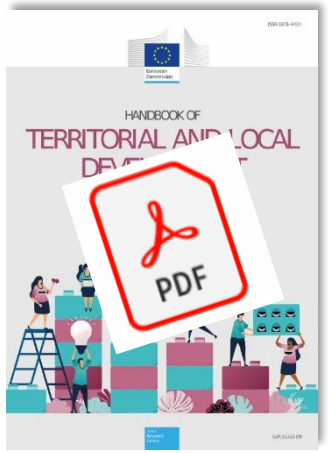

Policy learning and methodological support to design and implement territorial development strategies in non-urban areas

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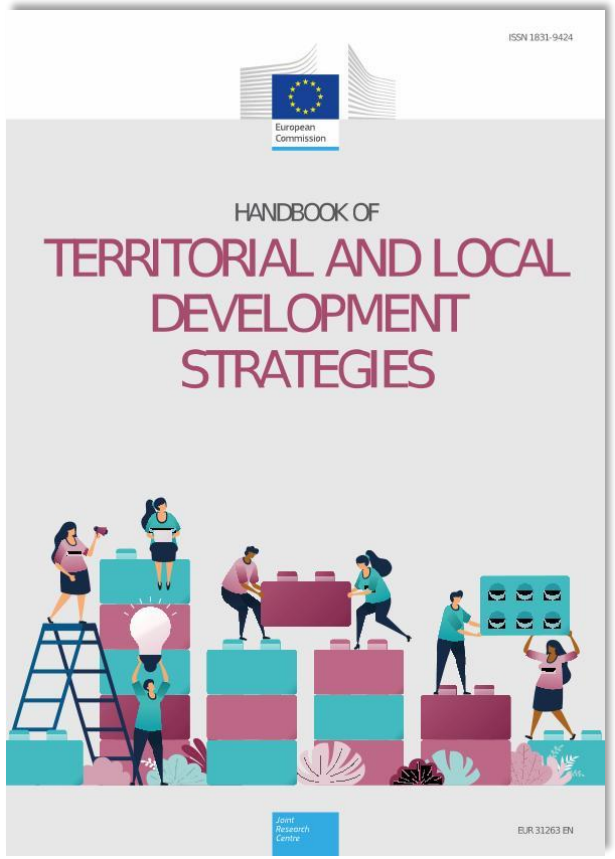
Handbook of Territorial and Local Development strategies



The Handbook is conceived as **a learning tool for policy-makers** to help them become aware of the different options when they **design and implement** integrated strategies supported by Cohesion Policy in areas **other than urban areas** *(PO5 specific objectives 2 in Art. 3, e (ii) Reg (EU) 2021/1058 (2021-2027).*

It **targets** regional and national managing authorities, local authorities, local action groups, development agencies, etc. involved in the process of policy delivery.

It helps them to tackle **most critic and recurrent issues** in the process of strategy-making and policy delivery. In particular, it is **especially useful** for public authorities with **less capacities** and less familiar with the functioning of EU funds.

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Understanding areas other than urban areas

Strategies can target very diverse territories

- They include rural areas, mountainous areas, islands and coastal areas, remote and sparsely populated areas and **many other types of territories** where a mix of urban and rural features coexist.
- They include **different scales**: local; sub-regional; functional area (including regional, sub-regional, inter-regional).

The diversity of these territories is reflected in the **differences of their development needs and potential**.

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Handbook in numbers

6 building blocks

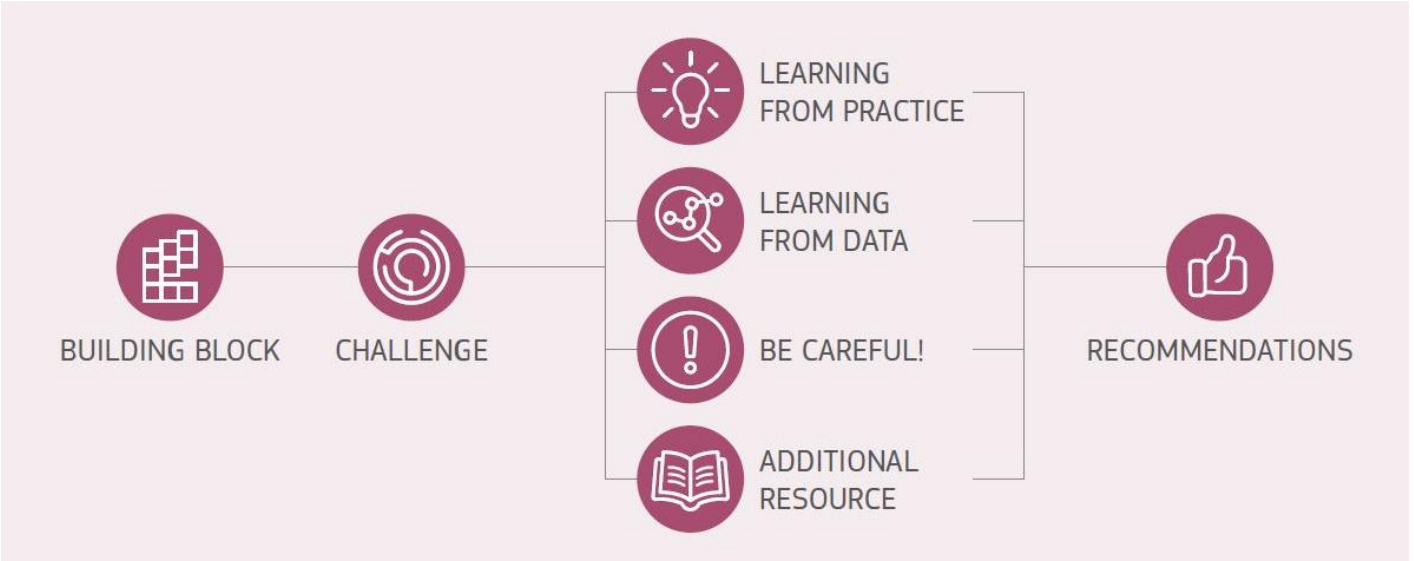
> **22** challenges

1. STRATEGIC DIMENSION
2. TERRITORIAL FOCUS
3. GOVERNANCE
4. CROSS SECTORAL INTEGRATION
5. FUNDING AND FINANCE
6. MONITORING

50 learning from practice

26 additional resources

For each **building block,** a number of **selected policy challenges** with examples, findings from data, alerts, available resources, and recommendations are available



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Chapter 1

16 Strategic dimension

A strategic approach entails a transformative and integrative socio-spatial process supporting the development of a **vision** of the future of a place, **coherent actions** and means for implementation.

It entails the ability to **integrate thematic areas**, to mobilise resources and people for a common cause and to navigate through the process while dealing with uncertainties.

Chapter 2

44 Territorial focus

A key task for policy-makers responsible for territorial and local development strategies is to identify a **consistent territory for policy action**. This includes defining the spatial scale and the specific area that are suitable to achieve strategy objectives.

Chapter 3

72 Governance

The effective governance of EU integrated territorial development strategies in non-urban areas requires the capacity to **coordinate within and across different levels** of government, public administrations and agencies, as well as the capacity to engage with the private sector, other public entities, NGOs and citizen groups in the concerned territory.

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Chapter 4
100 Cross-sectoral integration

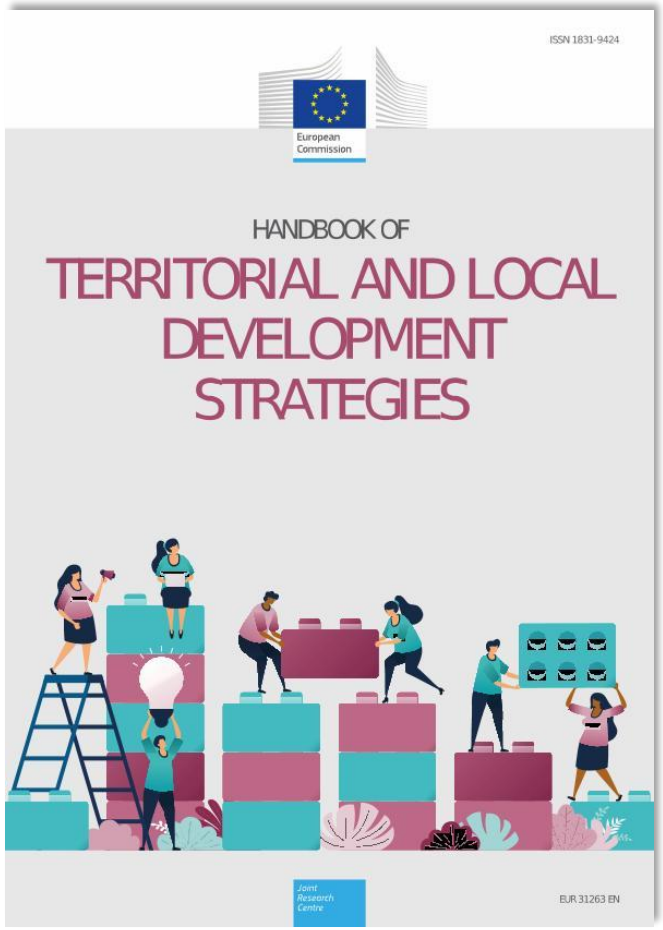
Integration across different policy areas is essential for territorial development strategies implemented within the EU cohesion policy. The diversity of territories calls for locally designed responses and the appropriate policy-mix corresponding to the specific needs and possibilities of each area.

Chapter 5
122 Funding and finance

Supporting a territorial integrated strategy requires knowledge on **funding instruments paired with the capacity and skills** to set up selection processes and monitor progress in line with funding rules. In case multiple funding sources and programmes are used, the **complexity** increases.

Chapter 6
152 Monitoring

The effective monitoring of territorial and local development strategies is crucial for their success. Monitoring provides important **data and knowledge to track progress and inform necessary revisions**. Moreover, a robust monitoring system supports transparency, accountability and the visibility of EU support 'on the ground'.



To view and download the report

Link to JRC Publications Repository:
https://publications.jrc.ec.europa.eu/repository/handle/JRC130788
Link to interactive page:
https://urban.jrc.ec.europa.eu/territorialstrategies/

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The self-assessment tools

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SAT4SUD

Link to the tool:
https://urban.jrc.ec.europa.eu/strategies/sat4sud/

SAT4TER

Link to the tool:
https://urban.jrc.ec.europa.eu/sat4ter/en

- This tool helps **Local Authorities** and national and regional Managing Authorities of **EU Cohesion Policy** to evaluate new or existing integrated territorial development strategies under the Policy Objective 5.1 (SAT4SUD) and 5.2 (SAT4TER)
- to identify those elements that **need to be strengthened** as well as **opportunities** for improvement
- Built around the **six building blocks** of the Territorial Handbook
- Can be used in **all the steps of the policy cycles** (design, implementation, evaluation)

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SAT4TER team

- **JRC**: Collection of information, analysed data, tool design and statements formulation, development and maintenance of the tool
  - Implementing team: **Giulia Testori** *(project leader)*, **Carlotta Fioretti** & **Martina Pertoldi** *(former project leaders)*, **Pier Saraceno**, **Anamaria Vrabie**, **Davide Auteri**, **Carmelo Attardo**, **Glauco Prina** *(ext)*. Communication responsible: **Elisa Bazzani** and **Gabriel Resende**. Graphical support: **Laura Spirito** *(ext)*.
  - **Alessandro Rainoldi** (Head of Unit)
- **DG REGIO**: Promoter of the initiative and funding DG. Collaborated in reviewing the statements and test the tool
  - Responsible team: **Marek Teplansky**, **Gergana Miladinova** and **Laura Hagemann**

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Live demo

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Strategy name

The title of the strategy will be the title of the document

Statements

26 questions on which to reflect on, divided by Building Block

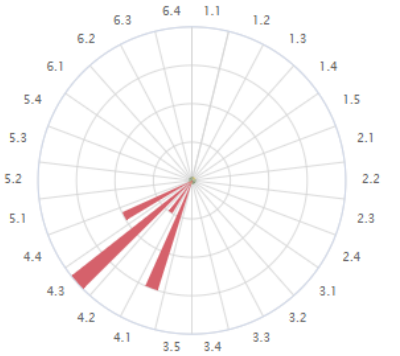
The tool

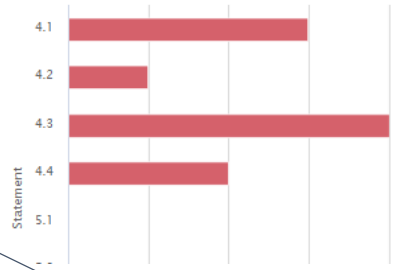
AT-001:Smart City Wien Framework Strategy

+ 1. STRATEGIC DIMENSION
+ 2. TERRITORIAL FOCUS
+ 3. GOVERNANCE
– 4. CROSS SECTORAL INTEGRATION

N.	STATEMENT	SCORE *
1	The strategy envisages an integrated response considering the economic, social and environmental dimension of the challenges identified in the analysis, fostering sustainable urban development and the transition to the productive, just and green city.	3
2	Cross-sectoral integration is pursued throughout the actions of the strategy triggering complementarities and synergies between them.	1
3	The strategy takes advantage of contributions from different departments, agencies and stakeholders in order to overcome policy silos, even in case the strategy has a main thematic focus.	4
4	The strategy indicates which bodies/departments are responsible for the implementation of each action and provides mechansims for coordination among them.	2

*** The scoring system goes from 1 to 4:**
1 = the statement is relevant for the strategy, but currently there are no or very few approaches to comply with it
2 = the strategy partly complies with the statement, although there is still significant space for improvement
3 = the strategy complies with all the components of the statement, but some aspects could be improved
4 = the strategy fully complies with the statement and can be counted as a good practice on this matter
NA = the statement is not applicable to the strategy





Graphs

Downloadable summarising the whole results – visual tools for discussion

Scores

From 1 to 4 plus NA

Additional resources

Links to the Handbook, challenges and learning from practice to help improving the scores

Notes

Useful to share reasoning with the others

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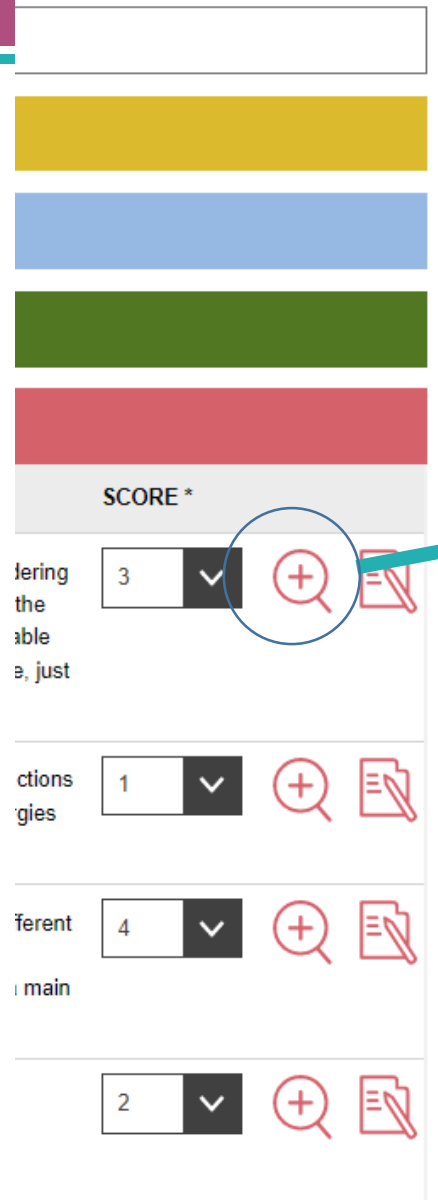

Strategy fact

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The tool

AT-004:Urban regional strategy for Ried im

+ 1. STRATEGIC DIMENSION

+ 2. TERRITORIAL FOCUS

+ 3. GOVERNANCE

4. CROSS SECTORAL INTEG

N.	STATEMENT
1	The strategy envisages an integrate the economic, social and environme challenges identified in the analysis, urban development and the transitio and green city.
2	Cross-sectoral integration is pursue of the strategy triggering complemer between them.

ategy factsheet

coring system goes from 1 to 4:
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ery few approaches to comply with it
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strategy complies with all the components of the statement,
e aspects could be improved
strategy fully complies with the statement and can be
d as a good practice on this matter
e statement is not applicable to the strategy

RESOURCES from the Handbook of Sustainable Urban Development strategies

Close

Statement 4.1 *: The strategy envisages an integrated response considering the economic, social and environmental dimension of the challenges identified in the analysis, fostering sustainable urban development and the transition to the productive, just and green city.*

Here you can find resources and recommendations to help you improve the scoring for this statement:

- How to ensure that SUD strategies bridge operational programmes and local policies?
- How to integrate themes at operational programme level?
- How to achieve cross-sectoral integration with a limited number of thematic objectives available (thematic concentration)?
- How to achieve cross-sectoral integration at local level in the implementation phase?

Here you can find inspirational examples:

- Berlin
- Tuscany
- Novo Mesto

Additional info

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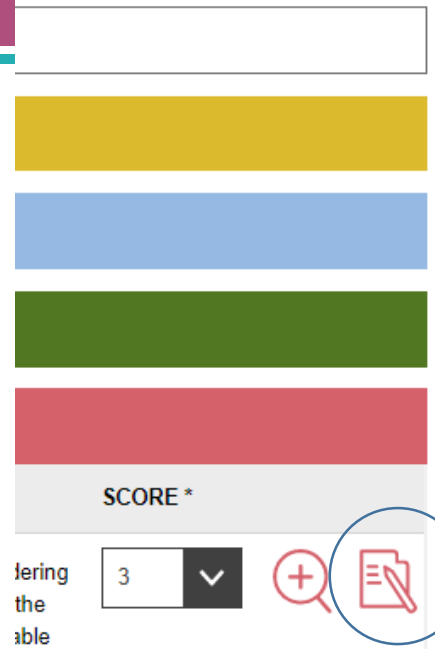

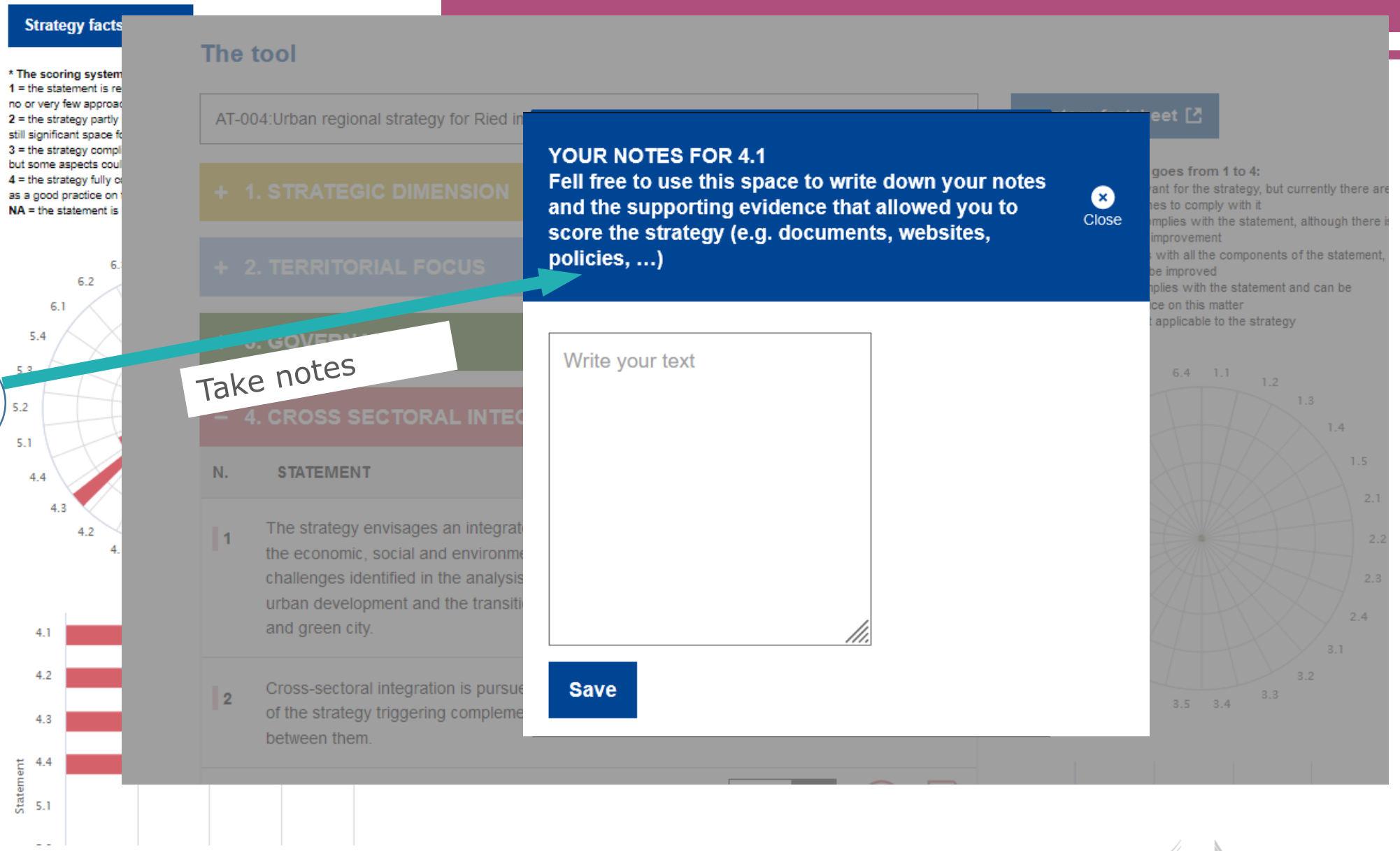

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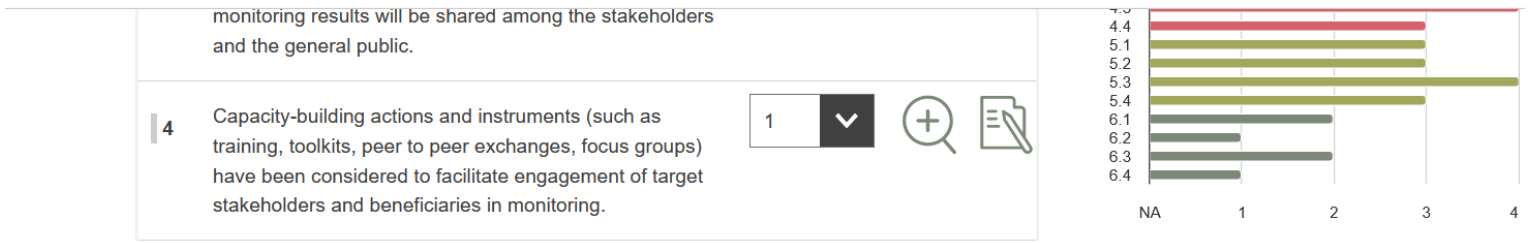

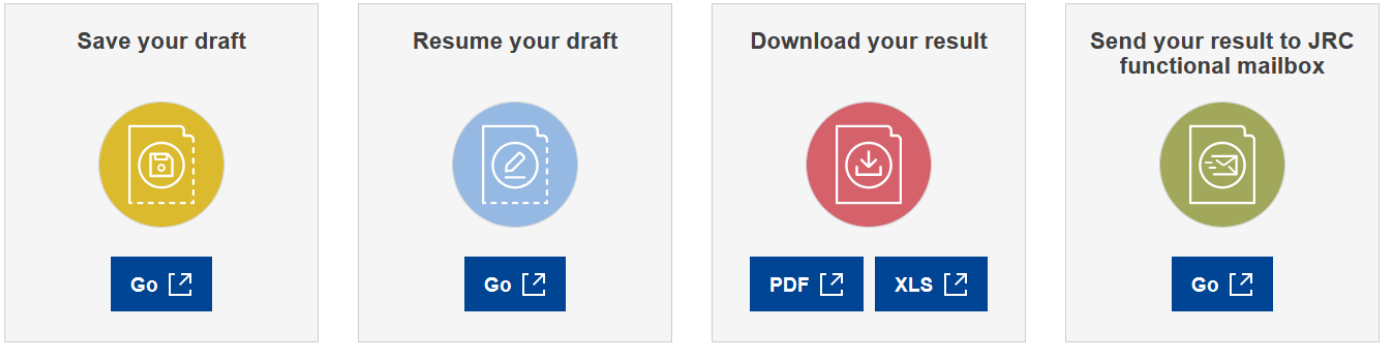

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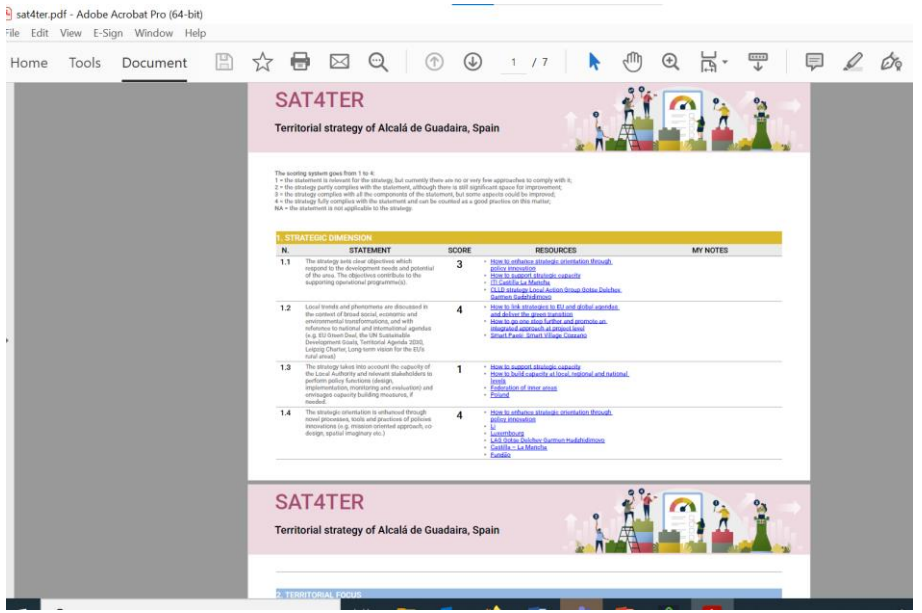

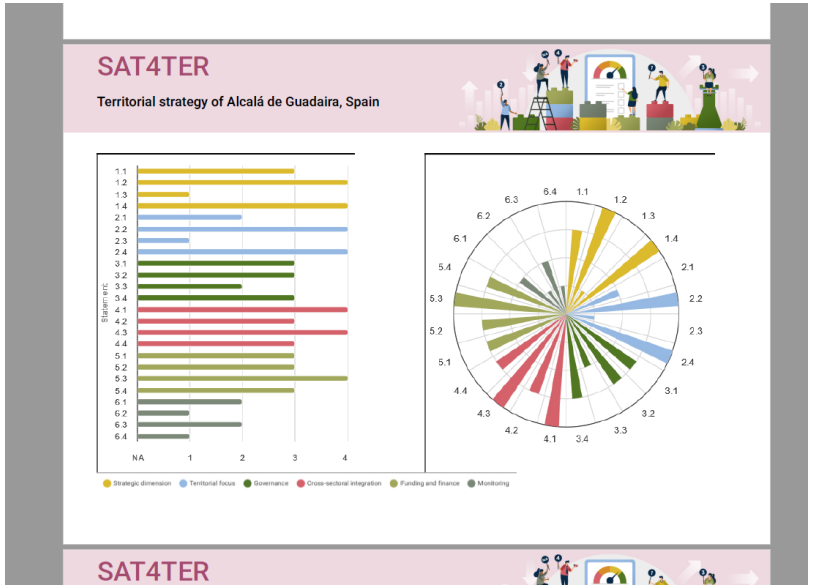

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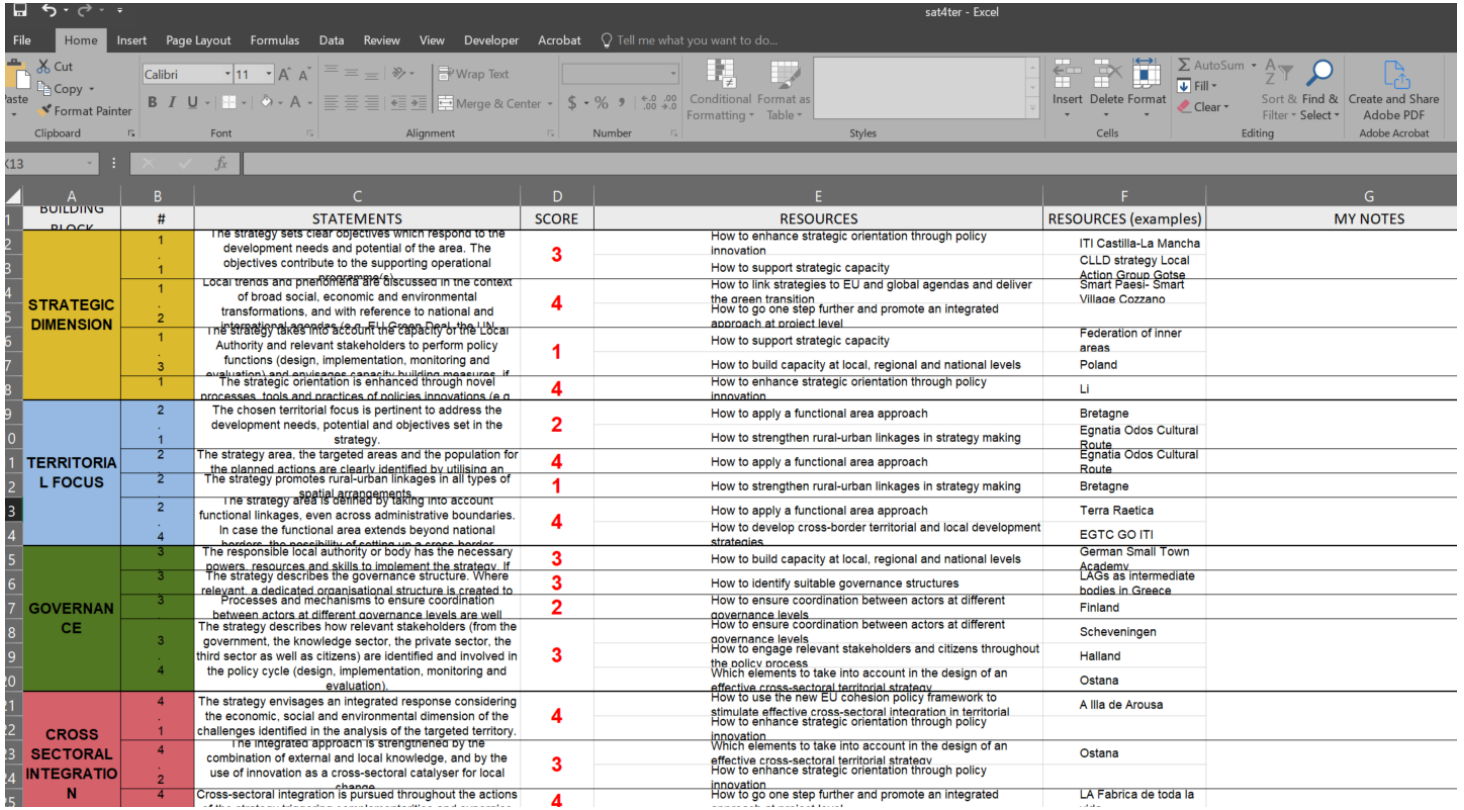

BUILDING BLOCK	#	STATEMENTS	SCORE	RESOURCES	RESOURCES (examples)	MY NOTES
STRATEGIC DIMENSION	1.1	The strategy sets clear objectives which respond to the development needs and potential of the area. The objectives contribute to the supporting operational	3	How to enhance strategic orientation through policy innovation	ITI Castilla-La Mancha	
				How to support strategic capacity	CLLD strategy Local Action Group Gotse	
	1.2	Local trends and phenomena are discussed in the context of broad social, economic and environmental transformations, and with reference to national and international agendas (e.g., EU Green Deal, the UN	4	How to link strategies to EU and global agendas and deliver the green transition	Smart Paesi- Smart Village Cozzano	
				How to go one step further and promote an integrated approach at project level		
	1.3	The strategy takes into account the capacity of the Local Authority and relevant stakeholders to perform policy functions (design, implementation, monitoring and evaluation) and envisages capacity-building measures, if	1	How to support strategic capacity	Federation of inner areas	
				How to build capacity at local, regional and national levels	Poland	
	1	The strategic orientation is enhanced through novel processes, tools and practices of policies innovations (e.g.	4	How to enhance strategic orientation through policy innovation	LI	
TERRITORIAL FOCUS	2.1	The chosen territorial focus is pertinent to address the development needs, potential and objectives set in the strategy.	2	How to apply a functional area approach	Bretagne	
				How to strengthen rural-urban linkages in strategy making	Egnatia Odos Cultural Route	
	2	The strategy area, the targeted areas and the population for the planned actions are clearly identified by utilising an	4	How to apply a functional area approach	Egnatia Odos Cultural Route	
	2	The strategy promotes rural-urban linkages in all types of spatial arrangements	1	How to strengthen rural-urban linkages in strategy making	Bretagne	
	2.4	The strategy area is defined by taking into account functional linkages, even across administrative boundaries. In case the functional area extends beyond national	4	How to apply a functional area approach	Terra Raetica	
				How to develop cross-border territorial and local development strategies	EGTC GO ITI	
GOVERNANCE	3	The responsible local authority or body has the necessary powers, resources and skills to implement the strategy. If	3	How to build capacity at local, regional and national levels	German Small Town Academy	
	3	The strategy describes the governance structure. Where relevant, a dedicated organisational structure is created to	3	How to identify suitable governance structures	LAGs as intermediate bodies in Greece	
	3	Processes and mechanisms to ensure coordination between actors at different governance levels are well	2	How to ensure coordination between actors at different governance levels	Finland	
	3.4	The strategy describes how relevant stakeholders (from the government, the knowledge sector, the private sector, the third sector as well as citizens) are identified and involved in the policy cycle (design, implementation, monitoring and evaluation).	3	How to ensure coordination between actors at different governance levels	Scheveningen	
				How to engage relevant stakeholders and citizens throughout the policy process	Halland	
				Which elements to take into account in the design of an effective cross-sectoral territorial strategy	Ostana	
CROSS SECTORAL INTEGRATION	4.1	The strategy envisages an integrated response considering the economic, social and environmental dimension of the challenges identified in the analysis of the targeted territory.	4	How to use the new EU cohesion policy framework to stimulate effective cross-sectoral integration in territorial	A Illa de Arousa	
				How to enhance strategic orientation through policy innovation		
	4.2	The integrated approach is strengthened by the combination of external and local knowledge, and by the use of innovation as a cross-sectoral catalyser for local change	3	Which elements to take into account in the design of an effective cross-sectoral territorial strategy	Ostana	
				How to enhance strategic orientation through policy innovation		
	4	Cross-sectoral integration is pursued throughout the actions	4	How to go one step further and promote an integrated	LA Fabrica de toda la	

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THANK YOU!

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