



# REGIONAL AND LOCAL RESPONSES IN PORTUGAL

**IN THE CONTEXT OF  
MARGINALIZATION  
AND GLOBALIZATION**

FERNANDA CRAVIDÃO  
LÚCIO CUNHA  
NORBERTO PINTO DOS SANTOS  
COORDENAÇÃO

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**NEW LOGICS OF DEVELOPMENT IN THE COUNTRYSIDE.  
A CASE STUDY IN CENTRAL PORTUGAL –  
THE EXAMPLE OF THE *SERRA DA LOUSÃ*<sup>14</sup>**

## 1. Introduction

To accept that societies and geographical spaces are heterogeneous, fluid and complex, perhaps the principal features identifying post-modernity, is to acknowledge that no unique and uniform ways of reading, organizing and operating with regard to territories are emerging (Carvalho and Fernandes, 2001).

Western and European rural spaces are no longer felt and seen only by their productive potential.

New development actors, new resources and new opportunities are basic factors in the construction of new rural landscapes.

One of the challenges for geography and geographers is how to participate in the construction of a narrative that can explain local (differentiated) responses to this and other major global challenges.

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## 2. The challenges and opportunities for the rural world in the context of new development philosophies

The path to revitalizing and re-integrating, or just revaluing, territories where new quality-based centralities are being rediscovered lies in defining and fostering a territorial image distinguished by individuality and specificity. This should be founded on unique and exclusive characteristics and on quality, and be largely centred on the identities and resources that symbolize each locality. The question of geographical scale should be irrelevant (Fernandes and Carvalho, 2003).

It is framed in the spirit of territorialist theories of development, those that best respond to the greatest needs of society and participative citizenry in an open global picture of strong competition, but also of solidarity, among people and territories. In other words, it lies within a new logic of social and territorial organization that complements the concept of diffusionist development (with its urban-industrial countenance) descending, poorly shared and harmonizing, excited in a quantitativist environment and in the myth of economic growth as the sole way to achieve progress (Hall *et al.*, 2003; Arroyo, 2006). This was the driving force at the end of World War II, and it left deep scars in the countryside (Woods, 2007).

In the light of this philosophy, protecting and valuing natural and cultural heritage (architectural, archaeological and ethnographic) is an essential condition for a landscape that is more balanced, distinguished and attractive. The image and identity of territories would thus be boosted, enabling them to constitute an important resource for affirming the territory and strengthening the self-esteem of the people, and, therefore, for local development (Dower, 1999; Kneafsey, 2001; Vallina, 2005).

The theme of rural development has increasingly gained in visibility over the past decade, both in relation to conceiving a new frame of reference and from the perspective of the effective and innovative participation of the actors (Moreno, 2003; Covas, 2006; Gutiérrez, 2006).

A sheaf of documents on strategic framing compiled by the European Commission, the United Nations World Commission on the Environment and Development and the OECD, to name the most important. They serve,

above all, to define the strategic guidelines for rural planning and development (Cheshire, 2006; Price, 2007).

The outlines of crisis in territories that are strongly individual, but which nevertheless have varied potential, may be diagnosed, together with the importance of the rural world and its values for the equilibrium and cohesion of the system. In Europe, the specific potentials of each territory are being unveiled, and attempts are being made to lay the foundations for the new philosophies of territorial development in rural spaces on concepts such as multi-functionality, sustainability and subsidiarity (Carvalho and Fernandes, 2001). The new policies and specific measures devised by the Community for the rural world lie in an integrated (multi-sectoral) perspective, cemented in local realities. The effective application of these policies now depends on the associating and sharing of responsibilities within the wider sphere of decision-taking, and on implementing, running and, finally, appraising processes and practices (Pascual, 2006).

The LEADER Community Initiative Program (Liaison Between Actions for the Development of the Rural Economy), launched in this atmosphere of change, is an unequivocal expression of this new concept of development: shared, individualized and contextualized, introduced vertically and horizontally, in a network of co-operation and solidarity.

The “chief goal” of the LEADER I and LEADER II initiatives, applied in the Objective 1 regions (backward in development terms), Objective 5b zones (fragile rural), and 6 (Scandinavian, with very low population density) has been “the promotion of local development in rural environments, on the basis of utilization and diversification of their potential in resources and initiative” (Barros, 1998: 10). They provide an innovative approach to rural development (Moreno, 2002).

Their innovative character lies, in part, in the fact that planning and management are done at the level of the territory concerned (sub-regional intervention zones) through partnerships involving several local development agents. A “local action group” (LAG) unifies the whole, although in a public regulatory framework and with public co-funding (community and national).

The new LEADER+ initiative for the period 2000-2006, has been designed on the basis of the experience of LEADER I and II. It seems to be a more

ambitious initiative aimed at stimulating and supporting high quality integrated strategies, with a view to ensuring sustainable rural development and bestowing a high degree of importance on the co-operation and constitution of networks among rural “zones” (European Commission, 2000).

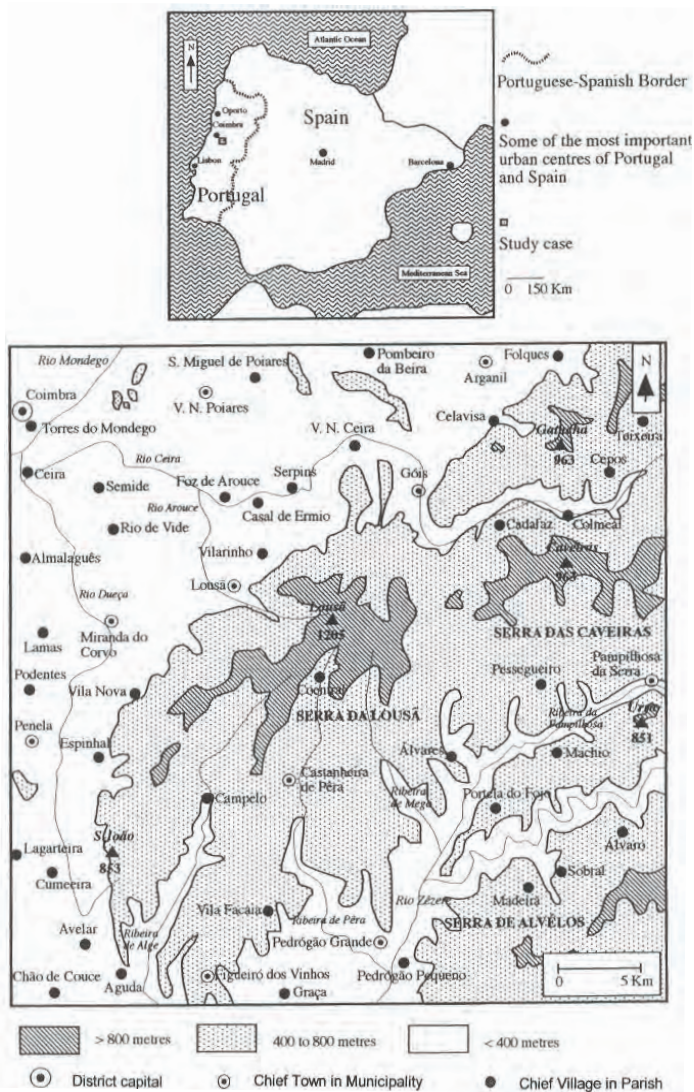


Fig. 1 – Simplified hypsometric map localizing the *Serra da Lousã*.

Source: Carvalho and Fernandes, 2007.

The success of the territorial and participative approach to development as proposed by LEADER, implies the creation of real partnerships at local level, a broad participation by citizens and a training of people's capacities in the domain of local development (Mannion, 1999).

But what will the local responses to these challenges be? Will the territory still be important and differentiating for geography? We are going to examine one case study.

### 3. The *Serra da Lousã*: from a sketch of a territorial portrait to old and new development initiatives

#### 3.1 A peripheral space undergoing transformation

The contemporary geography of Portugal reveals an asymmetric, heterogeneous country. The contrasting images of occupation and organization of the territory are divided between territorial polarizations and centralities reinforced by public policies with high expression on the Atlantic coast on the one hand and, on the other, deprived areas, almost always excentric and marginal (Jacinto, 1998). Vast areas of the interior of the country are in the latter situation since they have suffered actual loss over a period of many years through migratory movements and natural negative balance (Carvalho, 2005).

The *Serra da Lousã* (Figure 1), in *Pinhal Interior Norte* (Central Portugal), is a mirror of such trajectories and contrasting images of development.

The interior of the range of hills (the southern sector) is an inhospitable area, deeply marked by the cumulative effect of several problems (Table 1). These include: irregular orography, poor access by road (low density and poor communication routes), and to sundry services and facilities, fragilities arising from the productive base, low density of formal organizational structures, weak settlement structure (dominated by small hamlets) and fragile urban network (low hierarchical level), accentuated demographic decline, widespread loss of rural population and abandonment of the hills, progressive degrading of the forest (from oak and chestnut to pine woods,

eucalyptus, patches of brushwood and barren areas), high rate of sensitivity to forest fires, scattered farmland in dispersed plots and small-scale, high rate of owner absenteeism, under-utilization of natural resources – water, forest, wind and landscape.

This is a space that is running the risk of becoming marginalized and excluded from the transformation dynamics of the region, where development must continue to take public voluntarism into account (Baptista, 1999).

In these territories tucked away in the hills, at the very limits defined by local levels of desertion and remoteness from the main axes of circulation and more dynamic towns and villages, the strategic lines of intervention should consider the following: job creation and vocational training of working population, restructuring the system for settling the urban network so as to create small systems / viable territorial urban axes, stimulating co-operation and co-ordination between the public and private actors and defining a multi-active, multi-functional and multi-income base. Equally important aspects to bear in mind include promoting traditional arts and crafts; utilizing authentic products (indicating place of origin and bearing a certificate of quality) and scientific input into forestry, with environmental and social concerns. Importance should also be ascribed to protecting, preserving and utilizing natural and cultural heritage within the broad spectrum of their ethnographic, architectural and archaeological dimensions, while it is also crucial to develop projects for the basic infrastructure and amenities appropriate to a good quality of life and suitable for welcoming visitors (Cavaco, 1996; Cavaco, 2005; Carvalho, 2006).

In the case of the chief towns of municipalities, especially those with greater urban dynamism (such as the towns of Lousã and Miranda do Corvo), it is absolutely essential that the rate of growth over the past few years is framed in a clear and unequivocal strategy of sustainable development, soundly based on the capacity of the local labour force and the fixing of the population as well as on the core directives of modern urban planning. The importance of the urban image, urban quality and environmental characterization and accessibility are regarded as obstacles to / problems with organizing and improving the urban system (CCRC, 1999).

Table 1 – Selected indicators for the municipalities from the *Pinhal Interior Norte* (Central Portugal).

Geographical Distribution	A	B	C	D	E			F	G
					E1	E2	E3		
Alvaiázere	8438	-9.3	52.5	716	8	42	50	224.2	17.1
Ansião	13719	-2.2	77.7	1116	5	48	47	165.1	14.4
Arganil	13623	-2.2	40.9	2677	16	41	43	188.2	12.8
[Redacted]	3733	-16	55.9	1164	3	47	51	194.7	13.1
	7352	-8.2	42.4	1597	11	38	51	188.8	14.6
	4861	-9.5	18.5	884	15	35	50	268.1	17.6
	15753	17.1	113.3	6941	2	36	63	108.3	7.1
	13069	11.9	103	2811	4	32	64	113	9.6
Oliveira do Hospital	22112	-2.1	94.3	3464	5	51	45	132.6	12.3
Pampilhosa da Serra	5220	-10	13.2	857	24	30	47	373.6	25.2
[Redacted]	4398	-5.3	34.1	1011	8	29	63	278.7	19.9
	6594	-4.7	48.9	795	6	41	52	218.2	13.3
Tábua	12602	-3.8	63.1	1528	8	45	47	153.8	13
Vila Nova de Poiares	7061	14.6	84.1	709	4	34	63	108.2	10
Pinhal Interior Norte	138535	-0.6	52.9	6941	7	41	52	163	13.1
Região Centro	2348397	4.4	83	101108	7	38	55	129.6	10.9
Portugal	10356117	5	112.4	564657	5	35	60	102	9

Source: *Instituto Nacional de Estatística* (Portugal, 1991; 2001 censuses).

Legend:

A – Resident population in 2001.

B – Rate of change in the resident population in 1991-2001 (%).

C – Population density in 2001 (inhabitants/sq km).

D – Resident population in most important locality in 2001.

E – Structure of active population in 2001 (%): E1 (primary); E2 (secondary); E3 (tertiary).

F – Aging index = (Population > 64 years/Population < 15 years) x 100.

G – Illiteracy rate in 2001.

[Redacted] – *Serra da Lousã* municipalities.

### 3.2 Local development initiatives: old and new practices

After this territorial portrait of the *Serra da Lousã*, identifying its problems, potentials and opportunities, it is time to consider the initiatives and logic of local development, the actors therein and its organization, or lack of it.



We feel it is pertinent to highlight three initiatives, covering the end of the 1970s to the present day, which express the contexts and philosophies of development in which they are immersed.

### 3.2.1 Re-creation of some refuges in the hills: neo-rural occupation

The hill villages of Lousã are an excellent example of a change of identity and original, even excentric, trajectory. These settlements, formerly rural communities with an agro-pastoral economy and their own identities that had the Serra itself as a productive space (Osório *et al.*, 1989), were transformed into non-unified and socially contrasted recreational spaces (Rodrigues, 1994).

The (natural) population growth – which occurred between the end of the 1800s and the mid-twentieth century – was not mirrored by an increase in production and income. This resulted in progressive population mobility (Monteiro, 1985), and finally pronounced the irreversible decline of the hill communities (Table 2).

The second home was what led to the rehabilitation of three hill villages: Casal Novo, Talasnal and Candal.

The hill villages of Vaqueirinho, Catarredor and Cerdeira were occupied by people fleeing urban environments and coming from Central Europe. Some Portuguese also went there to practise (organic) farming, raising livestock, producing craft work, almost all of them in some form of isolation.

The physical rehabilitation of the hill villages is the result of spontaneous private, individual initiative and has received no public financial support (National or Community).

The new images portray re-created façades and new interiors adapted to the functions and values of the new occupants – neo-countryfolk.

The villages' rural surroundings with the ancient agricultural terraces, grazing lands and woodlands, remain neglected and deserted since the departure of the last hill-dwellers.

Table 2 – Evolution of the hill populations in Lousã (1885-2001).

Villages	1885	1911	1940	1960	1970	1981	1991	2001
Candal	112	129	201	100	72	19	22	2
Casal Novo	65	58	79	43	32	0	0	0
Catardedor	69	109	120	67	23	2	5	15
Cerdeira	70	75	79	51	18	0	8	0
Chiqueiro	23	11	45	26	12	4	4	3
Talasnal	74	129	135	90	59	2	2	2
Vaqueirinho	29	43	46	29	20	0	7	3
Silveiras	105	108	99	41	22	0	0	0
Total	547	662	804	447	258	27	48	25
Lousa (Municipality)	10868	12358	14367	13900	12161	13020	13447	15753
Villages/Lousã (%)	5	5.4	5.6	3.2	2.1	0.2	0.4	0.2

Source: *Instituto Nacional de Estatística* (Portugal, 1991-2001 censuses) and *Mapa Estatístico do Distrito de Coimbra* (1885).

Nevertheless, there is a certain geography of insecurity in the populated isolation of the *Serra da Lousã*, and this arises from the high risk of forest fires and the low density of occupation of those villages.

### 3.2.2 LEADER-ELOZ: an innovative initiative

The local application of the LEADER II Community initiative programme is a landmark in the development of the *Serra da Lousã*.

The major local innovation regarding the program is the active co-operation between two development associations: *Dueceira*, which integrates the municipalities of the northern sector of the Serra; and *Pinhais do Zêzere*, which involves the municipalities at the heart of the *Serra da Lousã*, an exemplary process, given the national panorama as a whole.

The ELOZ intervention zone (*Entre Lousã e Zêzere* – Between Lousã and Zêzere), with the municipalities of Miranda do Corvo, Lousã, Vila Nova de Poiares, Figueiró dos Vinhos, Castanheira de Pêra and Pedrógão Grande),

virtually corresponds to the geographic framework of the *Serra da Lousã*<sup>15</sup>. This sub-region has a resident population of almost 50 thousand (0.49% of the total population of the country) and an area of over 700 sq km (0.78% of the total area of Portugal) has promoted its predominant, dual colouring (green and blue) as its brand image, symbolizing its principal resources and potentials.

From a geographical reading of the initiative (Carvalho and Fernandes, *op. cit.*) we may pick out two significant groups of projects essentially for the material or immaterial nature of the actions:

- Projects of an immaterial nature, focusing on actions to promote and publicize the region, raising awareness and educating people, fostered by the municipalities and local bodies.
  - Material projects which generally absorb the greater part of investment and are divided into two sub-groups:
    - Actions seeking to improve localities by preserving and utilizing landscapes and the natural environment (e.g. river-side swimming pools); a range of urban interventions (creating parks and gardens, illuminating buildings in the historic centre, restoring and rehabilitating building heritage), and improving cultural and sports facilities, instigated by municipalities and by cultural and social associations;
    - Interventions in the domain of supporting the diversification of economic activities, with 54% of projects approved and 45% of the total investment made, across the broad spectrum of tourism in the countryside, modernizing small and medium-sized industries, crafts and proximity services, to which private and individual enterprise has responded in a really positive manner.
- Total investment is in excess of 3.5 million euros of which the European Union contributes 64%.

Local management, with dedicated and committed senior officials, has been crucial to the success of the initiative which has “played a [considerable] part in strengthening the ability to diagnose need, designing projects,

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<sup>15</sup> The municipalities of Góis and Penela are embraced by the ADIBER and TERRAS DE SICÓ intervention zones, respectively.

supporting local promoters in drawing up applications for different programs (...)” (Jordão, 1998).

The *Networked Crafts (Artesanato em Rede)*, launched last March, is an outstanding example of transnational co-operation. This is a project designed by *DUECEIRA* and developed in partnership with two other local development associations, accredited under LEADER II: *ADICES* (Portuguese) and *Montañas del Teleno* (Spanish, incorporating municipalities in the southwest of Léon province). Targeting craftsmen and craft skills, it has enabled craft products to be publicized via the Internet. It also aims to identify and introduce craftsmen/women, disclosing and making contact with a region of dynamic people which has its own deeply-rooted traditions, practices and customs. Within just three months, the site has been visited over 20 thousand times, and it is the most widely disseminated happening on the Directorate General for Rural Development (Portugal) web page, dedicated to LEADER.

### 3.2.3 The “Ecomuseum (of the Serra da Lousã)”: local (and regional!) memories and identities

The “Ecomuseum of the Serra da Lousã” is a local development initiative, planned by the municipality of Lousã and has been in progress since October last year.

It is basically intended to be an interconnected network of spaces with their own peculiarities but all contributing to the construction of just one cultural identity – the *Serra da Lousã*.

The function of the Ecomuseum is to “ensure the permanent and continued functions of research, conservation, utilization of local heritage and development within the territory in which the municipality of Lousã is defined, from the perspective of its development and with the participation of the people” (CML, 2000).

The lines of action for developing the project are based on establishing a network, supported by partnerships with public bodies (in the area of research, with the Coimbra Institute of Geographical Sciences) and local associations.

The strategic lines inspiring and underpinning it reveal the characteristics of an open, living, space, with a multi-nuclear structure (the hill villages of Lousã; the painting nucleus; the gastronomic and regional sweetmeats nucleus; the base, and research, nucleus; lime and tile kilns, water-mills, olive press and a restored hill cottage), functioning in a way that is articulated and decentralized.

The activities and interventions to be developed are extended to other areas, namely: creating routes for themed walks; establishing partnership protocols at national level and within the European Community, with similar Ecomuseums. Opportunities would thus be provided for experiences and know-how to be exchanged, publications about the heritage of the *Serra da Lousã* published and the traditional products of the *Serra da Lousã* promoted.

This Project is phased and the total cost is estimated at 1.5 million euros.

Acknowledging the worth of this initiative, we would like to see the other heritage “centres”, distributed around the *Serra da Lousã*, incorporated into it. The lines representing their own values could be enhanced and linked by means of the essential routes of recognition and dissemination, in partnership with the municipalities and other upland actors.

Might this not be another valid (and possible) perspective for the Ecomuseum of the *Serra da Lousã*?

#### 4. Conclusion

We find ourselves today agreed in acknowledging that local development strategies, based on a territorial approach and on an “ascending” type of execution, complete and substantially reinforce macro-economic and structural development policies. This challenge, posed by the territorial and ascending development approach, has stimulated a response in the framework of development of policies for rural regions.

This is the case specifically with the LEADER Community Initiative, which proposes long-lasting, integrated development for rural areas based on effective and representative partnerships and on local participation.

The *Serra da Lousã* serves to show how local responses to new development challenges are differentiated and to affirm the importance both of the territories and of geography.

We have moved from the spontaneous, individual and isolated initiatives which mostly emerged in the 1980s and were restricted to the reconstruction of hill cottages, largely by neo-countryfolk, to the innovative process arising from locally applying the pioneering experience of LEADER II, with results which it is greatly hoped will be continued and intensified. This will be achieved via a strategy of territorial development that is not only innovative, but also mobilizes local actors, in the ambit of LEADER +.

The recent project to set up an Ecomuseum of the *Serra da Lousã* partly belongs to this new theoretical framework. It has come about from the need to establish a coherent network of important structures and events and of resources, with respect to both cultural and environmental considerations. The different examples of cultural amenities, public services and museums, localities and pathways of environmental quality that already exist, or are planned, could interact with one another.

We are nevertheless waiting for the day to come when a sub-regional dimension is attained (within the framework of the partnerships and actors involved), capable of lending distinction to the dimension of the cultural geography of the hills.

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