

## Territorial approach – the new role of space in socio-economic development

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### Abstract

**Aim:** The aim of the article is to provide a theoretical analysis of the concepts of territory, space, and region in the context of the emerging paradigm of territorially oriented development. A secondary objective is to draw attention to the changing conditions under which contemporary socio-economic realities unfold within the framework of territorial economic cohesion.

**Methodology:** The research method applied is primarily descriptive, involving both a narrative approach and an analysis of the relevant literature.

**Results:** The results obtained have led, among other things, to conclusions emphasizing the necessity of adopting community based (coalition-oriented) approaches in order to make stronger use of creative resources.

**Implications and recommendations:** The authors point to the urgent need to seek new methods and concepts that strengthen socio-economic spaces and enable the monitoring of economic interactions taking place within them.

**Originality/value:** The cognitive value of the article lies primarily in drawing attention to the processes that induce the formation of specific structures of socio-economic development.

**Keywords:** territory, territorialisation, space

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## 1. Introduction

In the current socio-economic reality there is an ever-stronger relationship between economic changes and territorial features. In practice, this relates mainly to economic entities and their connection to a given socio-economic space. It is obvious that specific territories with suitable resources on the one hand act as 'magnets' and attract investments, innovations and creative capital. On the other hand, economic entities participating in the change co-create the logic of territorial development. This involves, among other things, embedding their economic strategies in a given place. The value added that is generated as a result of these processes, manifesting itself in the institutional and organizational spatial dimension, requires the application of new development policy tools not only relating to its unified formula. In these conditions, the need to adapt development policy to the individual characteristics of specific territories becomes fully apparent. This requires effective public territorial intervention, including above all the stimulation of social initiatives determining local development policy. The overarching feature of such an approach must be primarily collectivity and a strong dependency on local resources.

## 2. Fabrizio Barca's report – the path to reform of the European Union's regional policy

The cohesion policy and evaluation of its role in shaping European Union socio-economic development requires the continuous search for dynamic solutions relating, among other things, to elements of functionality. A report prepared in 2009 by Fabrizio Barca, general director in the Italian ministry of economy and finance<sup>1</sup>, was widely discussed in the debate on the future of the cohesion policy. The territorial approach presented in the report is a concept of an area-based approach, something of a novelty in the realization of the cohesion policy. It was based mainly on effectiveness, understood as combatting incomplete exploitation of development potential, and equality understood as combatting social exclusion. The report itself confirmed the role and importance of the cohesion policy for socio-economic development, but also underlined the need to conduct reforms. The recommendations were expressed in 10 pillars, relating in particular to:

- innovative concentration on core priorities,
- a new strategic framework for the EU cohesion policy,
- new contractual relationships, implementation and reporting,
- strengthened governance for core priorities,
- promoting additional, innovative and flexible spending,
- promoting experimentation and mobilising local actors,
- promoting the learning process: a move towards prospective impact evaluation,
- strengthening the role of the Commission as a centre of competence,
- addressing financial management and control,
- reinforcing the high-level political system of checks and balances.

It can be said that the report paved the way for reform of regional policy in the years 2014-2020, as the change related to the loss of monopoly by the state and in principle its concurrent location in the vicinity of the territorial government and other economic and social entities was a momentous event in shaping the future cohesion policy.

The changes themselves involved a departure from the traditional cohesion policy consisting of the pursuit of so-called convergence (of a compensatory nature), towards emphasizing a pro-development approach that encourages investment. The principal feature of development became territoriality, meaning that it is tied to a specific geographical, economic and social space. Voices were clearly audible about the emergence of a 'third generation' development policy based on territorialized development

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<sup>1</sup> On 16 November 2011, he took up the position of Minister for Regional Cohesion in the government. On 28 April 2013, he finished his term as minister.

concepts. In practice, this meant the need to adapt strategies that take into account the specific needs and potential of various regions, instead of applying one model for all across the entire EU. In the report, Barca is primarily in favour of:

- a policy adapted to the unique features of every region, promoting innovation and sustainable development adapted to the local context,
- result-oriented programmes,
- improvement to management structures to ensure more transparent implementation of the cohesion policy involving local stakeholders in the decision-making process,
- the need to integrate the cohesion policy with other EU policies, mainly those related to innovation, the environment and social exclusion, in order to create a more cohesive and synergic approach to regional development.

Based on the above, it can be clearly emphasized that Barca's report changed the approach to perceiving and above all implementing the cohesion policy, determining later reforms and strategic directions for the policy's development framework. The proposed territorial approach became the main idea for its further effectiveness and efficiency.

### **3. Territory as a specific construct of socio-economic development – a review of definitions**

At the beginning, it should be noted that in principle territory has always referred to regions, which were perceived as areas together with settlements, enterprises and local communities. However, spatial processes have meant that the perception of territory and the determining of its boundaries have undergone change over time. Thus, according to Kopaliński, for example, a territory is an area of land with defined boundaries; a geographical area subject to the authority of a state, or a dependent country (e.g. a colonial possession) with a certain autonomy (Kopaliński, 1994, p. 509). Meanwhile, according to the Polish language dictionary, a territory is an area of land distinguished by certain characteristic features (Skorupka et al., 1969, p. 827).

In today's socio-economic reality, the concept of territory has become crucial in considerations regarding local and regional development. In the territorial approach, space is perceived not only as a place of location and accumulation of resources (classical, traditional approach), but also as a spatial form of organization, reducing the uncertainty and risk associated with the activities of entities, being at the same time a source of new values and strategically important resources (Torre, 2023). Garofoli (1993, p. 24) defines it as an area in which market exchanges meet with social forms of regulation. It is an area that determines various forms of the organization of production and innovative capabilities. In this case, territory is treated as a form of economic organization (a place of collective situated economic processes). It becomes primarily a place defined by the proximity of problems and the coordination of individual expectations and activity (Jewtuchowicz, 2016, p. 227). Le Berre defines territory similarly, stating that it is "a place on the Earth's surface adapted by a social group to ensure reproduction and the security of their vital needs" (Le Berre, 1992, p. 662).

According to Jewtuchowicz (2005, p. 64), in the concept of territory sociologists place particular emphasis on interpersonal relations, while economists in turn stress exchange. She is of the opinion that "the essence of territory is expressed in social relationships, in the relations between the collectivity of people and the area in which they live, and in the sense of belonging to this area, in which concepts are distinguished such as: identity, appropriation of space and embeddedness in a specific place. A territory is a system, and development manifests itself primarily as a social process and not only a technical process" (Jewtuchowicz, 2005, pp. 64, 65).

She also notes that the "concept of territory developed in recent years in economics contains the concepts of organization, politics, economics and society, in which historical, ideological, emotional and even imaginary dimensions are present" (Jewtuchowicz, 2005, p. 65). And emphasizes that in

“Weber’s classic theory of location, a territory is a location which, from the viewpoint of relatively uniform criteria of the attractiveness of a given place (mainly transport costs), is the most optimal for conducting production activity” (Jewtuchowicz, 2005, p. 101). Thus, territories face the need to organize themselves in order to attract the greatest amount of industrial investment.

The above idea is developed by Pietrzyk, in whose opinion a territory is defined through the lens of endogenous resources created in an interactive and evolutionary manner. These are unique resources including culture, norms, operational logic and social architecture. The same author states that “territory is a living space, a place of solidarity, cooperation and exchange, in which identity is shaped; it is created by a specific community” (Pietrzyk, 2004, pp. 12, 13) and comes to the conclusion that a certain ‘territorial market’ emerges, resulting in territorial competition.

On the basis of institutional and evolutionary economics, a territory is interpreted as a historically shaped place in which a specific institutional and relational system appeared. It is understood as (Domański & Marciniak, 2003, pp. 131, 132):

- the birthplace of technologies and innovations,
- a place for coordinating economic activity and a link between local external benefits and firms’ organizational trajectories,
- the seat of political decision-making bodies capable of creating and sharing resources, as well as representing the authorities with regard to enterprises,
- a place where non-tradable interdependencies arise and develop.

These interdependencies stimulate entities’ technological and organizational progress, and are conducive to the coordination of these activities.

According to Szafranek, territory should absolutely be linked to the category of territorial cohesion. The same author states that “in the traditional understanding, it is an area that has defined boundaries and assigned ownership rights or suzerainty. In this sense territory means cities, administrative regions and states” (Szafranek, 2019, p. 54).

Domański takes a very interesting position, considering territory from the point of view of linking this economic category with the organizational space of enterprises. He states that in geographical research, the enterprise is naturally considered in the territorial context. For enterprises the territory is geographical distance, the spatial distribution of location factors, and the natural and socio-economic surroundings. The economic structure of a territory may consist of a few large enterprises or a large number of small enterprises. Such enterprises can operate in close cooperation with one another and form so-called clusters, or they may be not connected to the economy of the territory. Both large and small enterprises are usually linked to other territories’ (Domański, 2012, p. 122).

Nowakowska interprets territory as a place dynamically created in time and space by interactions and network relations, with its own informal institutions and specific resources that enable achieving a higher level of economic effectiveness. It is perceived as a dynamic form of organization that reduces uncertainty and risk, and constitutes a source of the creation and accumulation of resources and the transfer of knowledge, innovation and skills (Nowakowska, 2018, p. 5).

The above definitions confirm that the contemporary meaning of territory is becoming increasingly economic, as powerful interactions are formed among the economic entities located within it. It is obvious that the strength of these interactions is the result of globalisation and other factors, nevertheless, the capability to build such interactions as well as remain competitive comes primarily from bottom-up initiatives which integrate with local and regional development goals. In this way, conditions are created for economic entities operating on a global scale. That is local entities, the mutual links that connect them, and the way they are organized create a certain social construct defined by the term ‘territory’. In this understanding, territory takes on a subjective nature, it is not merely a geographical space defined by administrative boundaries, but becomes a specific socio-economic actor. We can say that a territory is a specific area in which market exchange takes place, and which also impacts various forms of production organization and innovation capabilities.

Therefore, it is a place of collective, located economic processes and a particular form of economic organization. Moreover, it is a system of spatially concentrated and historically shaped activities: technical, productive and institutional, executed and coordinated by various organizations and more or less specific human resources (Fig. 1). It is a unique regional environment that generates a range of elusive resources determining, among others, territorial innovation capabilities.

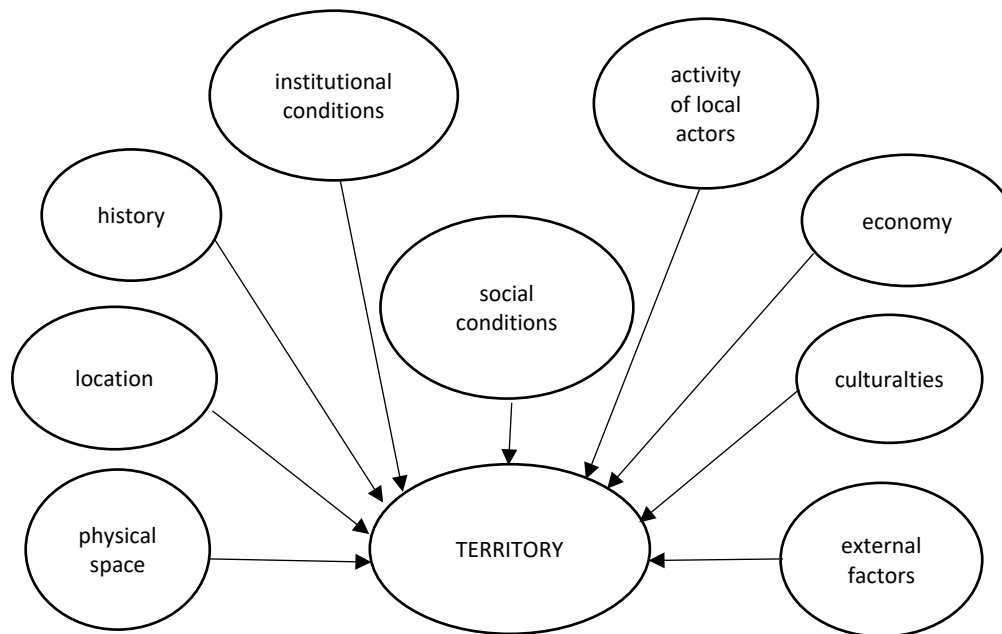


Fig. 1. Factors shaping territory

Source: (Kwaśny, 2018, p. 125).

#### 4. Territory, space and region

Although it might seem intuitive that territory and space can be synonymous, and it is not an error to use these categories interchangeably in economic practice, for the purposes of this article it is however necessary to distinguish scientifically between these terms. In comparison of territory and space, including in particular socio-economic space, it should be underlined that distributed within such space are human production and non-production activity, as well as all human settlements. Territory, meanwhile, gives enterprises the possibility to become embedded. The territorial dimension relates above all to the organizational conditions in which creative activity is conducted (Colletis-Wahl, 1995, pp. 805, 806).

From an economic point of view, space is neutral, while territory integrates or contributes to integrating economic actors. However, socio-economic space is important in every activity, understood as part of the geographical space in which individuals live and work permanently (*ecumene*) or temporarily (*subecumene*) (Korenik, 2010, p. 17). It is considerably smaller than geographical space. It constitutes a set of points in a three-dimensional system and is differentiated in terms of geographical and natural conditions, as well as the level and intensity of human activity. This means that the importance of its individual points in national economic potential differs. As a consequence, individual elements of the spatial structure of the country display varying economic states.

In contrast to physical space, economic space can be characterized by an infinite number of dimensions. The processes and phenomena that take place within it are realized in a thousand different ways and in a thousand different directions. This space is not limited by the principle of physical proximity; its fundamental advantage is not a lack of geographical limitations, but an unlimited capability for forming relations (Korenik, 2006, p. 20). Thus space is a place in which market mechanisms operate, while a territory is a place for the creation of technology. However, both space and territory are undisputably

an expression of society, while the terms are accompanied by a territorial development logic. Both terms are shaped by the dynamics of social structures. As Castells (2007, p. 411) states, “space is crystallised time”, whilst Nowakowska (2017, p. 8) writes that “territory comes from the mobilisation of internal strengths”.

The distinction between the concepts of space and territory shows that in both types of development (regional and local), based on endogenous development factors, community is assumed to be the basic factor. In such a situation it is not only manifested as trade, but also as the sum of social relations in a given socio-economic space with its own history and culture. The specifics of a given territory themselves become a key element of competition. In practice, this means competing, for example, through local and regional social and organizational innovations. Taking into account that these can occur in various spheres of the local and regional economy, they should be understood as the ability and willingness of individual members of communities to break with existing habits, forms of perception and types of goals guiding allocation processes (Drucker, 2004, p. 17). Here, additional interdependencies are revealed between the dynamics of industrial, service and territorial organization. This means that new ways of thinking both from a theoretical and practical standpoint strengthen the territory and allow technical and economic progress to be more easily absorbed, as well as initiated. In the same way, social transformations occurring within the territory induce, for example, new territory-enterprise relations. As Domański (2012, p. 123) claims, “relations between firms cannot be properly defined unless they have an intermediary link through which each activity is woven into the fabric of relations with other activities. This link is the industrial (economic) system, and in geographical research it is recommended that the concepts of such a system should be adopted as a starting point. It is important to explore those interactions and dependencies in the system with which the exchange of information and knowledge is connected. The geographer is interested, amongst others, in the scope to which such interactions and exchanges occur within the boundaries of individual territories”. This shows in what way enterprises affect the structure and dynamics of space and why they select a particular place for their activity. It is therefore necessary to underline that “on a local scale, cooperation between various units and people become an important element, as creative and innovative solutions emerge in the process of multi-aspect interaction. The best area would seem to be the region (micro-region) as proximity, cultural ties, similar values and trust constitute the best basis for the development of various forms of flexible horizontal connections” (Łuczyszyn, 2012, p. 77).

Thus space is not only a place for economic activity or a production factor. Along with socio-economic progress it has become a relational space with the ability to process signals (stimuli) or their refraction, disseminating innovation or creating barriers to it adapted to the dynamics of the processes in which it is entangled. Under this term, it is highlighted that thanks to relations between enterprises, administration, scientific institutions and social organizations, value added is generated and new resources are created. Meanwhile, to put it simply, territory is a historical construct equipped with its own technical and human potential. It is therefore a specific area in which market exchange takes place and impacts various forms of production organization and innovation capabilities. It is important that a territory so defined should have its own development dynamics. This may include weak internal relations (a poorly qualified workforce or a low-quality economic environment), or may also be territories capable of forming local production systems based on their own resources. It is precisely territorial dynamics, allowing for the internalization of external effects by the continual creation of new competitive resources that attract investors and external financing.

Thus today, the primary determinants of territorial units are issues of social identity and functional connections<sup>2</sup>. As stated by Jewtuchowicz (2005, p. 69), the “distinction between space and territory leads to the conclusion that local development is a particular form of development that assumes the local community as a fundamental factor. In consequence, the concept of location space has been

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<sup>2</sup> This is evidenced, for example, in the principles of conducting territorial division, the effect of which should be a relatively permanent fragmentation of the area of the state, carried out using legal norms in order to determine the territorial principles for the activity of state organizational units and local government territorial units.

replaced by the concept of actor space. Development is beginning to be understood not only as the result of trade, but also as a derivative of the complex set of relations between actors grouped in a given geographical space with a certain culture and history”.

The concept of territorial capital fosters a more sophisticated view of the determinants of development and contributes to the deconstruction of the narrative of the decline of cities and regions stigmatised and left to themselves. It points to new opportunities for the development of ‘ordinary’ cities and regions that are disadvantaged in terms of the main drivers of post-modernist change (Egyed & Racz, 2020, pp. 57, 58). Such an approach draws particular attention to the territorial nature of innovation, economic organization and territorial capital.

In terms of the classical interpretation of the region, it can be said that there are practical differences between the territory and the region. Citing Castells, that territory is “a space defined by socio-economic flows and relations resulting in the creation of new values and resources, as well as ways of organizing space” (Castells, 2004, p. 86), the conclusion can be reached that it is primarily a ‘creature’ made up of entities linked by a common goal of action. Table 1 presents the fundamental differences in interpretations of individual categories with regard to region and territory in the context of spatial interpretation.

Table 1. Evolution of the interpretation of meaning of space in development processes – comparative analysis

Category	Region	Territory
Source theories	location and agglomeration theory, growth poles and development polarization theories	theories of institutional economics, evolutionary economics, concepts of territorial forms of production organization
Source and value of resources	location (access to development factors, transport costs) and concentration of economic activity	interactions, networks, entities' organizational and institutional proximity
	development based on generic resources (general, universal)	development based on specific resources (unique)
	orientation towards exploiting existing resources	orientation towards creating new values and resources
	orientation towards optimal allocation of possessed resources	orientation towards creating complementary resources and on combinations and reconfigurations of resources
	a key analysis category is geographical (physical) proximity	a key analysis category is social and institutional proximity
Development process mechanisms	the space creates interactions, and these determine the ways in which entities' behaviours are coordinated	interactions build the territory, and it determines ways of coordination ( <i>territorial governance</i> )
	development based on competition mechanisms (zero-sum game)	development based on the coexistence of competition and cooperation mechanisms (positive sum game)
	existing space – static approach	territory created by actors – dynamic approach
Boundaries	limited space – regions have delineated administrative boundaries	open space, boundaries are determined by entities' activity
Entities	the basic analysis category is the location and concentration of economic entities	the basic analysis category are relations between entities (actors)
	the ‘aterritorial’ development strategies of economic entities oriented towards exploiting resources	the territorialization of economic entities (embeddedness in the local environment)
Development policy	a universal development policy addressed to all units (a policy that is ‘blind’ to place, and neutral with regards to space)	a territorialized development policy adopted to the specific resources and needs of a particular territory

Source: (Nowakowska, 2018, p. 10).

## 5. Conclusions

The idea of the territorialization of economic processes and development policies carries the burden of general philosophy and the framework of a territorial-functional approach to shaping development at various spatial levels. Numerous examples from economic practice confirm that there is no universal model for territorial policy. An undisputable feature of such an approach is its focus on collectivity, and territorial development itself must take place in functional systems; only then will it be strongly determined by specific resources, mainly endogenous resources. Strong interactions create specific networks of connections (socio-economic relations), and at the same time contribute to stimulating mechanisms as a result of which entities co-participate in establishing creative resources. The general assumptions and ideas of the concept of territorial capital do not raise major theoretical doubts and the concept itself has met with great interest in the economic community and geographers. The challenge remains to study the state of its development.

In practice, achieving the adopted development goals results in the identification of new ways and concepts. It should be generally stated that the evolution of territorial (regional) development policy is dynamic, and in the contemporary socio-economic reality it is expressed by the adoption of the territorially oriented development paradigm.

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## Podejście terytorialne – nowa rola przestrzeni w rozwoju społeczno-gospodarczym

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### Streszczenie

**Cel:** Teoretyczna analiza pojęcia terytorium, przestrzeni i regionu w kontekście kształtowania się nowego paradygmatu rozwoju ukierunkowanego terytorialnie. Celem ubocznym jest zwrócenie uwagi na zmienność warunków, w jakich zachodzą współczesne realia społeczno-gospodarcze w ramach spójności ekonomicznej terytoriów.

**Metodyka:** Zastosowane metody badawcze to głównie metoda opisowa oraz analiza literatury przedmiotu.

**Wyniki:** Uzyskane wyniki doprowadziły m.in. do wniosków o konieczności stosowania wspólnotowości (koalicyjności) w celu silniejszego wykorzystania kreatywnych zasobów.

**Implikacje i rekomendacje:** Autorzy wskazują na pilną potrzebę poszukiwania nowych sposobów i koncepcji wzmacniających przestrzenie społeczno-ekonomiczne i monitorowania w nich zachodzących interakcji gospodarczych.

**Oryginalność/wartość:** Wartości poznawczej artykułu należy upatrywać przede wszystkim w zwróceniu uwagi na procesy indukowania się specyficznych konstrukcji rozwoju społeczno-gospodarczego.

**Słowa kluczowe:** terytorium, terytorializacja, przestrzeń

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