



**caENTI**  
Coordination action of the  
European Network of Territorial Intelligence

[www.territorial-intelligence.eu/caenti/](http://www.territorial-intelligence.eu/caenti/)

**Final scientific Report**  
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## Executive summary

The caENTI is a consortium of eight universities and seven territorial actors. As a general objective, it aims to integrate present research projects on territorial intelligence tools, so as to give them a European dimension.

To do so, it works out three activities of comparative research coordination:

- Tools for and by actors
- Fundamental methods
- Governance principles

It includes two dissemination activities: the Internet portal <http://www.territorial-intelligence.eu> and annual international conference.

The WP6 “Tools for and by actors” carries out the caENTI objective. On the one hand, it is fed upstream by the WP4 “Fundamental Methods”. This WP provides technological solutions coming from research generic tools. On the other hand, it is fed by the WP5 “Governance principles” that evaluates these solutions acceptability, by referring to sustainable development.

The caENTI also aims to make data sets applicable to multi-disciplinary research activities and to territorial development.

Since the caENTI beginning, the research activities and technological developments about the tools were led according to three axes about the information contents, their analysis tools, and the uses of these tools within the territorial multi-sector partnerships.

About contents, the wp6c group harmonized the guide, the repertory and the territorial indicators of Catlyse observatories. Wp6f integrated the guide in an on line accompaniment file. Then Wp6i drafted the specifications of the European portal of territorial actors on the bases of the conclusions of Wp4i.

About uses, the wp6g draft guidance notes and started studying the uses of the observation tools by actors within development partnerships. Then, we create a group wp6u to draft detailed specifications on documents, protocols and uses from experimentations.

About tools, contant progress were made by wp6p, that harmonized and update tools of data and spatial analysis (pragma, anaconda and sitra), then wp6d, that integrated them, and wp6s, that integrated tools with contents, protocols and uses in TICS.

From March 2008 to February 2009, the WP6 “Tools for and by actors” aimed to draft the specifications of:

- A Territorial Information System adapted to the needs of the territorial actors of sustainable development and of the community, that is to say a “Territorial Intelligence Community System” (TICS).
- A European portal of territorial indicators, as a part of this system.
- A European Observatory of Elementary School on the basis of the French “Observatory of Rural School” experience.

Its objectives also consisted in following tools experimentations and in structuring a base of territorial intelligence projects, starting from the caENTI ones.

The coordination group wp6c “Contents” harmonized the specifications (themes and questions) for the European guide of diagnosis and evaluation, the services repertory and the selected territorial indicators, by synthetizing the contents defined and used by the different Catalyse observatories, between them and with the available European standards. Then, they deepened the guide contents meanings whilst taking into account the different national contexts.

The accompaniment file is a traditional tool used to improve the quality of human services. Information it includes must be useful for the person’s multi-sector accompaniment. The coordination group wp6f drafted in 2007 the main specifications of the file, and its structure to manage the individual follow-up, on the one hand, and global diagnosis and evaluation with structured indicators on the other hand. In the file, the guide is always useful; it gathers the individual multi-sector indicators requested for the territorial observation.

The coordination group wp6i aimed at working out a portal of information at the attention of local actors. Concretely, it is a question of allowing the visualization of data characterizing the socio-economic environment of people to increase the comprehension of territories, of their dynamics and of their problems with the help of a webmapping tool. Our work focused on the contextual and geographical data gathering (administrative cuttings and statistics), on the study and the implementation of the representation modes of online mapping information, and finally on the study and implementation of the representation and storage techniques of information and meta-information. The effective information gathering showed the difficulty to make information gathering (cost, variability of sources, absence of metadata, lack of harmonization). It generates difficulties to spread territorial information.

The group wp6p updated the methodological and technical specifications of the Catalyse software in 2006: the data analysis tools Pragma, Anaconda and Nuage, and the

territorial indicators system (TiS), to use them in a way conform to the contents specifications, by improving their accessibility as PC tools and by developing online versions. It also coordinates the software development.

In 2007, the group wp6d organized a small team of researchers and engineers composed by twelve persons to design the *specifications for the processing and editorial chain from data to results*. They started developing the specifications to get more friendly, free, multi-platform and multi-language versions of the Catalyse Toolkit. They also focused their activity on conceptual specifications of the Territorial Intelligence Community System and the online versions in the prospect of this specific Territorial Information System.

In 2006, the group wp6g started defining the use and implementation of the Catalyse tools in the development partnerships, in order to draft guidance notes for the Catalyse Tools use. It specified the contents meaning, the data analysis protocols and the specific governance for the territorial observation uses in participative partnerships.

In Huelva 2007 conference we created a specific group wp6u to follow up the experimentations that were in augmentation with new observatories. It was also in charge to draft the specifications of an on line repertory of the territorial intelligence actors, especially development partnerships, that will aims at describing and analyzing their uses in matter of observation. It made a form to collect information and started with Catalyse observatories.

In 2008, the group wp6s drafted the specifications regarding the design of the Territorial Intelligence Community System, a concept that emerged within the caENTI coordination research activities framework on the basis of the Catalyse method. Its research activities were organized according to four integration axis:

- Integration of the data processing software, with articulated cross-platform and on line multilingual versions with a blog for download and documentation. A specific contents management system for the Catalyse observatories prefigures the TICS.
- Online editorial process from data gathering to results publishing with the definition of the main documents, data modelling and metadata.
- Data processing protocols for statistic and spatial analysis: global phases and stages, and then a detailed one for each question.
- Integration of the actors uses according to the Catalyse governance and the actors experiences.

The objectives of the coordination activity European Observatory of School (OES) are to study the transferability to the other European countries of the method that is experimented

in France by the Observatory of Rural School (ORS): follow-up of a students troop to valuate the specificities of the territorial impact on success, knowledge of the territories and of their links with school, social territory representations and mobilization of the local actors. This group suggested a faisability study of the critical analysis of ORS based again on the same general principles. The methodology is based on the analysis and interpretation of the school follow-up of significant samples of pupils from different types of geographical environments. The information come from surveys made with the pupils, their parents and their teachers their entire curriculum long. The group transfered the old ORS database in a new epragma system. It also organized many seminars that allowed to gather and publish intersting papers on the European educational system.

**The WP4 studied** the fundamental methods, generic tools and research design in territorial information analysis within the social sciences and humanities. It aimed at improve their diffusion of the methods within the social sciences, to increase the use of territorial indicators, and to define the concept of territory in the multi-field context of the integrated approach. During the two first period five groups worked on five complementary topics.

The wp4m firstly made an inventory of the analysis methods of territories used by researchers, so as to identify those that can allow designing tools that can be used by territorial actors. Thus, the wp4m worked on data analysis, spatial simulation, mapping and GIS and territorial observation.

The **wp4i** identified the main sources of territorial information available for the researchers and focused on socio-economical and environmental information available on Internet at different territorial scales in Europe. A second step was launched, it consists in a confrontation of this territorial information with people's needs, *via* the Catalyse method.

The wp4p tried to answer the two following questions : What are the projects funded by the UE (research and action) that we can consider as Territorial Intelligence projects? Which GD information is relevant for Territorial Intelligence? We found few projects and the GD answered that all information is on Eurostat

As far as the wp4t is concerned, it specified the definitions and approaches of the territory concept in the disciplinary sub-sets of social sciences. This reflexion led to the implementation of a survey on the European teams that work on territory and on the methods they use.

Territorial competitiveness (wp4c) is an integrated and proactive approach to shape the future of territories and regions. Territorial competitiveness strategies can indicate how to explore potentials for development and employment and at the same time support an enhanced quality of life, by helping to meet the challenges of sustainable development.

At the beginning of the third period, WP4 made to pre-synthesis

The confrontation of the steps led by wp4m and the wp4t led to a new questioning on the links between territorial knowledge and fundamental methods. Eventually, two levels were distinguished, the one of methods, paradigms and scientific positioning that can make progressing the territories knowledge and the processing methods of territorial information one. Thus, according to us, territorial knowledge is based on the idea territory is not only a material spatial reality but also an actors system, with its memories, its representations, its tensions and its projects. From this basis, any step of territorial knowledge should meet territorial actors, as well as their needs and their suggestions. Nevertheless, the territorial intelligence specificity lays in the scientific vision it has on the territorial issue. This scientific look is transverse and pluri-disciplinary, it is devoted to help actors and is planned to be enriched by actors. Territorial intelligence builds a collective knowledge, which object is territory and which subject is community. Beyond the mere production of tools, it reformulates the relation between researchers and actors and explicitly inscribes it in the sustainable development prospect.

Wp4i and Wp4c worked together on territorial information and indicators. Research activity on territorial indicators helps to reveal the vulnerability and a sustainable development approach. Regarding the environmental indicators, they were included in this reflexion. The local conditions and the local resources are territorial intelligence indicators nevertheless, the economic indicators are not relevant for territorial actors. The essential problem is that territorially-based actors want to position and maintain their region utility in reference to a set of measures and indicators that are conceptually suspect and often empirically weak.

It is directly not possible to integrate most of the indicators into the GIS application.

Then WP4 made its synthesis.

Among the methods of territorial data processing, we should particularly mention Geographical Information Systems (GIS) and territorial observation. The GIS are a system to capture, store, analyse and manage data and associated attributes which are spatially

referenced on the Earth. The system is described by an indicators set that are shared by a community. It replaces the observation tools in the heart of the actors systems in tension in a given territory, that is to say in the governance heart. Besides the indicators of territorial intelligence allow a modern spatial analysis, taking into account the local conditions, the knowledge-based society and the community cooperation considered as a network. In general, this information is not as relevant as the actors need, in our vision of sustainable development.

The main general objective of the caENTI WP5 is the analysis of the application of the sustainable development governance principles to territorial research-action. It consists in deliberating on ethical and methodological principles that should be respected by research protocols of social sciences and humanities, so that the research results favour territorial governance and the territories sustainable development.

During the project first phase the WP5 elaborated the document “Application of the governance principles of sustainable development to territorial research-action” (deliverable 40). This paper is based on the auto-assessment of the research processes the caENTI members led and on the debate about the principles that inspire the research activity practice, in order it really contributes to the governance development. In order to contextualise this debate, the group set itself the initial objective of reaching a consensus on a basic conceptual framework concerning territorial governance, sustainable development and territorial intelligence. Given the importance of this approach for all the participants, the group also agreed on its vision of action-research. Based on the conclusions of this initial work, during the second period the debate entered greater depth and the group drew up action-research protocols inspired by these principles. The result of this debate was the caENTI Quality Letter on Action-Research Favouring Territorial Governance of Sustainable Development (deliverable 47). This work was presented and debated during the International Conference of Territorial Intelligence of Huelva in October 2007, with successful results. During the last caENTI period we focused on the practical aspects of the principles of the quality letter application and in particular on those regarding the information and communication technologies use in the research processes performed within the WP6 framework. The group dealt with the elaboration of the Catalogue of participative research-action methodologies - and especially on those suitable to be applied to territorial intelligence development projects- (deliverable 48), with the elaboration of the Catalogue of technological tools –and especially on those suitable to be applied to territorial intelligence development projects- (deliverable 49) and on the elaboration of a Video: “Research is at territories intelligence service.” This

video articulates the WP5 and WP6 (WP6u) work as it presents the uses of the caENTI tools by the caENTI actors. It is subtitled in English and French (deliverable 50).

The Wp3 objective was to contribute to the visibility of all caENTI activities and to disseminate its results towards the greatest number. Wp3 also provided the caENTI with a protected Extranet (Intra-consortium website) and a cooperative workspace (CooSpace). The first version of the territorial intelligence portal was born on March 2006, accompanying the caENTI start. A new version, more “Territorial Intelligence oriented” was presented during Huelva 2007 in October. At the end of the caENTI project, the territorial intelligence portal is ready, well indexed in the web and constitutes a solid base for the network of territorial intelligence in order to pursue its activities. Wp3 also set up blogs allowing covering live international conferences of territorial intelligence and the Catalyse Community allowing to download tools and to consult a multilingual online documentation.

During caENTI, three international conferences on territorial intelligence were organised with the caENTI support. The University “1<sup>er</sup> decembrie 1981” of Alba Iulia organised the first one from September 20<sup>th</sup> to 23<sup>rd</sup> 2006 on the theme « *Region, identity and sustainable development* ». The second one was organized by the University of Huelva, from October, the 24<sup>th</sup> to the 26<sup>th</sup> 2007 on the them « *Territorial Intelligence and Governance Participative research-Action applied to territorial development* ». The last one was organized by the University of Franche-Comté in Besançon, from October, the 15<sup>th</sup> to the 17<sup>th</sup> 2008 on the theme « *Tools and methods of Territorial Intelligence* ». The audience evolved from 100 during the first one up to 225 researchers during the third one and the number of published papers increased from 44 up to 83.

During caENTI, the WP1 was mainly in charge of the financial coordination activities, what mainly implied to follow-up the consortium expenses and to gather financial data (in terme of expenses and efforts) from the participants at the end of each mid-term period, and in a more detailed way at this end of each reporting period. Besides, the WP1 dealt with legal issues, in particular when we had to organise the consequences of a caENTI partner withdrawal from the partner when it had to cease its activities. Moreover, the WP1 organised the project scientific coordination meetings and annual international conferences with the local caENTI partners. It also coordinated the translation of most of the caENTI reports and deliverables. Lastly, the WP1 worked on the caENTI innovation and dissemination issues and wrote the mid-term and periodic reports on this issue.

As general prospects, the caENTI started a process that will go on after the end of the coordination action. We should think to the future. On the basis of the progress and results, we defined the tasks that should be made on the short term.

- Develop and update tools
- Follow up and develop experimentations.
- Maintain and widen the prototype of the European portal of territorial indicators.
- Feed the Catalyse blog with new versions and documentation.
- Continue to draft specification of the territorial intelligence community systems.
- Publish the base of territorial intelligence actors
- Publish on line the European repertory of research teams for which territory is an object.

The research on fundamental methods and tools will be published in reviews and continue.

The works on the governance principles generate debates on the ICT use and on the participative methods the caENTI will not be able to conclude.

To ensure the continuity of the caENTI actions, we started an action of foreshadowing of a network of excellence in territorial intelligence, supported by the French National Center of Scientific Research, aims at constituting a virtual laboratory at the international scale.

Three research activities are presently foreseen:

- Making a multi-disciplinary synthesis of territory sciences
- Developing territorial information and disseminating the territorial observation and spatial analysis methods, especially towards vulnerable people and territories
- Improving the contribution of territorial information systems to an equitable governance and to sustainable development, through a better integration in the territorial decision-making process

Three dissemination activities have already some foundation:

- - The Journal of Territorial Intelligence..
- A project of European master in territorial intelligence
- The international federative website territoriesnet.
- The sixth International Conference of Territorial Intelligence "*Tools and methods of territorial intelligence*" that took place in Besançon (France) in October, 2008, was successful. Many participants want to be members of the next network of excellence and more than 12 teams offered to organize seminars and coordination meetings for preparing this project.

The next international conference of territorial intelligence, « Territorial Intelligence and culture of development » will take place in Salerno (Italy), from 4th to 6th November, 2009.

***SECTION 1 – PROJECT OBJECTIVES AND MAJOR ACHIEVEMENTS FROM MARCH 2006, 1ST TO AUGUST 2009, 31<sup>st</sup> (Jean-Jacques Girardot)***

This section gives an overview of the general project objectives, summarises the objectives for the reporting period, describes the performed work, the involved contractors and the main achievements, in the course of the period. We also make comments on the most important problems we faced during the period, including the undertaken corrective actions.

***1.1. Overview of CAENTI general objectives and starting state-of-art***

The Coordination Action of the European Network of Territorial Intelligence is a research action funded by the 6<sup>th</sup> framework program “Integrating and Strengthening for the European Research Area” of the European Union, in the thematic priority 7 “Citizens and governance in a knowledge-based society”. The General Directorate of Research of the European Commission funds it, amounting to 900.000 euros.

It is coordinated by the Université de Franche-Comté (UFC, France) with the support of its Europe service. The Institute of Humanities, Social and Environmental Sciences Claude Nicolas Ledoux (USR 3124) is in charge of the management and of the scientific animation of caENTI, with the support of the laboratory ThéMA (UMR 6049).

The caENTI consortium gathers seven universities, a national research center, and seven territorial actors, which belong to seven European countries (France, Spain, Belgium, Italy, Slovenia, Hungary and Romania) plus Taiwan.

QuickTime™ et un  
décompresseur  
sont requis pour visionner cette image.

*Diagram 1 : caENTI consortium*

The caENTI objectives are inscribed in the continuity of the Catalyse observation method diffusion in more than thirty European territories since 1989, to observe vulnerable people in territories that suffer from industrial recession or that did not take advantage of industrial development, mainly in central, southern and western Europe.

QuickTime™ et un  
décompresseur  
sont requis pour visionner cette image.

*Diagram 2: Dissemination of Catalyse observatories in Europe since 1999*

The members of this network are multi-sector territorial partnerships that are composed by public, private and NGO members. They are « development partnerships » of the European innovation and social cohesion programme Equal.

These partnerships are constituted at the territorial scale with the will to act together to improve the vulnerable people's situations, characterised by an accumulation of difficulties: unemployment, precariousness, distance from employment, loss or lack of resources, handicap, autonomy loss, illness, environment deterioration, illiteracy, discriminations, marginalisation, loneliness, exclusion... They want to better understand these situations complexity to overcome the sectorial action limits.

They made territorial diagnosis to improve the economic, social, health, environmental and cultural well-being of people and of territorial communities. They evaluate their actions, so as to more efficiently manage them and to design more relevant projects.

These partnerships developed their territorial observation activities in an autonomous way on the basis of the Catalyse method designed within the framework of the European project Mosaïque (1989-1994) and then they enriched within the research-action framework. Their collaboration with a university provides them a support to use information and communication technologies, to implement data processing tools and to make statistic and spatial analysis of individual data and territorial indicators. The observatories they constituted regularly gather hundreds of services, and approximately follow twenty territorial indicators.

Since the beginning of the diffusion of the Catalyse observatories, involved actors and universities have formed a network through transnational partnerships. Suggested for the first time in 1998 as a link between knowledge and action, the concept of territorial intelligence, which "refers to all the multi-disciplinary knowledge, that on the one hand help understanding the territorial structures and dynamics, and on the other hand aspire to be an instrument for actors of the territories sustainable development" (Girardot, 2002) has given scientific objectives to the network activities.

The caENTI general objective is to integrate the present research projects on territorial intelligence tools, so as to give them a European dimension.

Now, the caENTI research activities, like all the 6<sup>th</sup> FPRTD actions, falls under the prospect of the ambitious objectives the European Union gave to itself during the Summit of Lisbon of 2000: becoming the most competitive knowledge-based economy, able to have a sustainable growth while improving social cohesion.

For several years, the European Union has introduced project management and evaluation in its programmes. Sustainable development established the principles of good governance: participation, global and well-balanced approach and partnership. Scientific instruments adapted to these principles are available for experts, but the territorial actors rarely benefit from simple and cheap tools to draft, manage, observe and evaluate their projects. These instruments mobilise research, which provides a quality guarantee, and territorial actors that experiment and value them. Consequently, caENTI associates research teams and actors to draft territorial intelligence tools for action.

To do so, caENTI coordinates three activities of comparative research and two activities of dissemination.

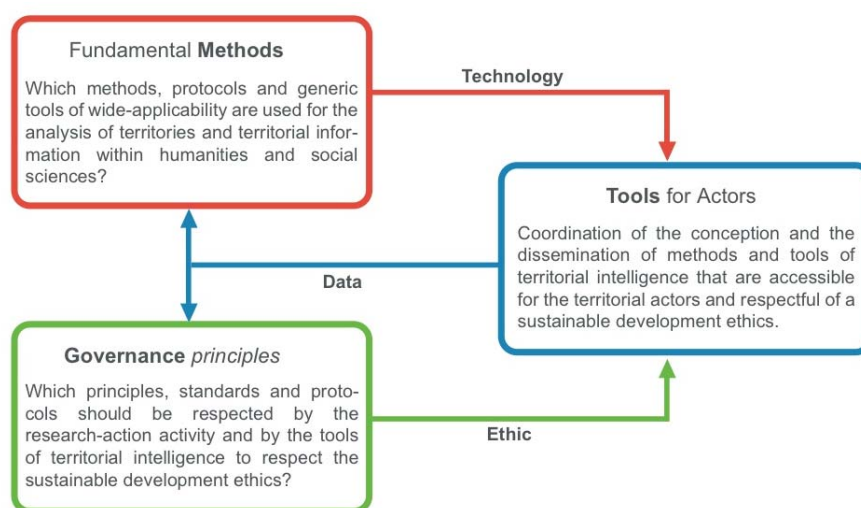
The two dissemination activities are the international annual conference of territorial intelligence and the portal <http://www.territorial-intelligence.eu>. The three territorial intelligence conferences took place in Alba-Iulia (Romania) in September 2006, in Huelva (Spain) in October 2007 and in Besancon in October 2008. The conferences proceedings are published on the portal.

The three research coordination activities include:

- The design of tools for and with territorial actors and the coordination of their achievements (tools for actors);

- The inventory of scientific methods, research protocols and generic instruments for territorial information analysis, used in the HSS laboratories and likely to provide technological modules for the action tools (fundamental methods);
- The governance principles, standards and protocols for research and action that ensure these tools respect the sustainable development ethics (governance principles).

These three research activities are articulated according to the following diagram:



*Diagram 3: Research coordination in the CAENTI*

“Tools for and by actors” corresponds to the caENTI final objective. Upstream, it is fed, on the one hand by “Fundamental methods” that gives it technological solutions and, on the other hand, by the “Governance principles” that evaluate the acceptability of these solutions by referring to sustainable development. caENTI also aims at making data sets useful for multidisciplinary research and territorial development.

## ***1.2.Objectives for the reporting period, organisation and contractors involved, global work performed and main achievements during the period***

This part presents overviews of:

- The general project objectives of each work package during the third and last reporting period, from March 2008 to February 2008, recording for each work package the work starting point
- The work programme, organisation and work performed during the period.

The second point will be detailed later in the paragraphs devoted to each of the workpackages.

### **1.2.1. Objectives of the third period and organisation**

The general objectives of the caENTI during this period were:

- The international conference of Besançon 2008, as a first occasion to disseminate the caENTI results
- The results finalisation and the preparation of the final documents, in particular the deliverables and the reports.

The **WP6 “Tools for and by actors”** strongly contributes to the achievement of the caENTI global objective. It essentially aims to give a European dimension to research actions on technical tools for actors and on territorial data sets. These are widely started at the local or even at the national scale. According to the EU policies orientations, the WP6 designs and coordinates the implementation and the documentation of friendly tools. The goal is to help the actors of territorial sustainable development drafting, managing, observing, evaluating and transferring participative projects to multi-sector partnerships.

During this period, the WP6 started working on:

- The information contents: questions of the diagnosis and evaluation guide (deliverables 51 and 56), individual information of the accompaniment file (deliverable 57), information of the services territorial repertory (deliverable 52) and territorial indicators (deliverable 53)
- The analysis tools and their integration in a territorial information system (deliverables 54, 55 and 58)
- The uses of these tools in multi-sector partnerships (deliverable 56)
- The critical analysis of the French “Observatory of Rural School” experience.

From March 2008 to February 2009, this workpackage aimed at drafting the specifications of:

- A Territorial Information System adapted to the needs of the territorial actors of sustainable development and of the community, that is to say a “Territorial Intelligence Community System” (TICS, coordination group wp6s, deliverable 60)
- A European portal of territorial indicators, as a part of this system (wp6p, deliverable 59)
- A European Observatory of Elementary School (wp6e, deliverable 61).

During the studied period, the WP6 objectives also consisted in following tools experimentations and in structuring a base of territorial intelligence projects, starting from the caENTI ones (wp6u).

The **WP4 “Fundamental Methods”** aims at identifying scientific methods and generic tools useful to design tools for actors. It firstly animated five coordination groups in

2006 (deliverables 23 to 27) and 2007 (deliverables 28, 29, 30, and 32) and aimed to prepare their results synthesis (deliverable 33) with two mid-term syntheses about:

- The territory concept and the territories analysis methods.
- Territorial information and territories competitiveness indicators.

After this step, the WP4 started making a synthesis of all its works (deliverable 33).

The **WP5 “Governance principles”** led a reflexion about the principles to be respected to use research methods and action tools within a sustainable development framework. This work package main objective, the “analysis of the application of the governance principles of sustainable development to territorial research-action”, consists in deliberating on ethical and methodological principles that should be respected by research protocols of social sciences and humanities. The objective is the research results favour territorial governance and territories sustainable development.

During the international conference of Huelva in 2007, the WP5 presented the Letter of Quality for territorial intelligence, on the basis of the study caENTI European universities research context and practices (deliverables 34 to 39), synthesised in a report about the application of the sustainable development governance principles to territorial research-action and on the basis of its evaluation by the caENTI European universities (deliverables 41 to 46).

During the third period, the WP5 focused on the drafting of:

- A catalogue of participative research-action methodologies, especially those applicable to projects of territorial intelligence development (deliverable 48)
- A catalogue of technological tools (deliverable 49)
- A Video “Research for territories intelligence” (deliverable 50).

The **WP3 “Internet portal”** is a powerful media to disseminate the caENTI activities and results. After it developed the Intra-consortium website (deliverable 17) and the cooperative workspace (deliverable 18) and published two periodic editorial reports (deliverables 19 and 20), its main effort focused on launching a Catalyse community and in preparing the conference of Besançon 2008, which cover was ensured through a conference blog. Then, the WP3 drafted the final editorial report (deliverable 21) and a global report on the territorial intelligence portal <http://www.territorial-intelligence.eu> (deliverable 22).

Another dissemination means is the **WP2 annual international conference**. It is the occasion to mobilise the consortium and other researchers and actors interested in territorial intelligence. After the international conferences of territorial intelligence Alba Iulia 2006

(deliverables 11 and 12), Huelva 2007 (deliverables 13 and 14), Besancon 2008 (deliverable 15, call for papers), it published the acts of the last caENTI conference (deliverable 16).

The **WP1 “Management”** wants to provide an efficient scientific, financial, administrative and IDM management to the caENTI consortium. After it published two mid-term reports (deliverables 1 and 4), two periodic reports (deliverables 2 and 5) and an innovation and dissemination report for the first two periods (deliverable 3 and 6), it published a midterm report (deliverable 7 and now the third and final management and financial report (deliverable 8), the final innovation and dissemination report (deliverable 9) and the caENTI minutes (deliverable 10) that include the documents linked to all the caENTI coordination meetings and conferences.

### **1.2.1. Workprogramme and work performed during the period**

During the third period, the WP6 kept designing the specifications for the Territorial Intelligence Community Systems (TICS) and the specifications of a European portal of territorial indicators. It made a first prototype for a European webmapping of territorial indicators at the commune level. It also coordinated experimentations and the design of a repertory of territorial intelligence projects.

Since the first period, the WP6 has drafted the global specifications of a TICS, designed on the basis of the actors needs and uses. During the third mid-term period, the Wp6i was in charge of the specifications of the whole TICS modelling:

1. The integration of the statistical and spatial analysis functions
2. The analysis protocols modelling
3. The specifications of the documentary and editorial chain
4. The integration of the social uses of development partnerships

The analysis functions integration are firstly made in the wp6p work group in 2006 and in the wp6d work group in 2007. After having written the specifications of the Catalyse tools and described their online management (deliverables 54, 55 and 58), the WP6 started updating the software and integrating the previous specifications into the TICS design. To organize this work, it had to articulate its activities, particularly concerning the Catalyse Community and the tools documentation, with the WP3 ones, as it was in charge of the web development. It also articulated the work with the WP6g and the WP6u concerning the uses, which are strongly linked to the tools configuration. Lastly, it articulated the web

development with the WP6i regarding the webmapping integration within the Catalyse Toolkit. All the developed tools can be downloaded on the Catalyse Community website. Jpragma is ready to use in its version 2., ePragma is presently used in its first version and its version 2 is ready to be tested. Anaconda is used in its version 2.2, and its version 3 can be tested. eAnaconda is used in its first version. The Territorial indicators System (TiS) is ready to be integrated in the TICS and to be fed by the European indicators. The Catalyse CMS is presently tested in two places and it is being modelled. This WP also provided an automatic setup module to each tool, integrated them in the Catalyse CMS, finalized the integration of the pair “jPragma + Anaconda” and of the pair “ePragma + eAnaconda” and it started the documentation drafting in a wiki.

The main steps of the analysis protocols definition by the wp6g (deliverable 56) and of the protocols specification on the basis of the Accem experimentation are useful to detail the analysis protocols of each guide question.

From the specifications of the guide (deliverable 51 and 56), the repertory (deliverable 52), the TiS (deliverable 53 and 56) and the file (deliverable 57), this work package started making the documents inventory, description and standardization. After having chosen the Dublin Core, it worked on the data modelling and on the metadata specifications.

Concerning the integration, this working group firstly defined the uses in the deliverable 56. Then, it specified the governance scheme of the development partnerships. On the basis of the experimentations in progress, it started defining other authorities, the needs of each of them and the design of the communication protocols that correspond to them.

A third coordination group of the WP6, the wp6u “Uses” was created during the conference of Huelva, so as to coordinate experimentations and to harmonize the approach of fidl territorial intelligence projects.

The experimentations coordination aims to help actors describing their most innovative practices in a communication to be presented during the conference of Besançon. Accem wrote a manual that includes the meanings and protocols concerning all the questions of the Accem guide, which is broader than the caENTI guide. This work group initiated a new experimentation with an external development partnership in Chapelle-lez-Herlaimont (Belgium). It defined a guide, starting from the caENTI one and it started gathering data, in order to make a first diagnosis.

From a grid for Catalyse evaluation, filled in and analysed during the coordination scientific meeting that took place in Liege on February 2008, the group suggested a more complete form to describe a partnership and to analyse and evaluate its observation tools and uses. This form was filled in by the caENTI partners and by the Catalyse observatories with the researchers support.

All the specifications drafted about functions, documents, protocols and uses of the TICS are in the deliverable 60.

The wp6i coordination group, in charge of the European portal of territorial indicators, drafted specifications and executed the webmapping system (deliverable 59). It aims to facilitate the execution of territorial diagnoses and contextual studies for territorial actors. The territorial information and base maps gathering and conditioning were achieved from the inventory of territorial indicators. The working group previously made it within the “fundamental methods” activity framework in relation with the analysis of the actorsindicators use (deliverables 24, 29 and 53). It also studied the metadata issue and made the data-processing development of the webmapping interface. It is operational at the commune level for Europe and several experimentations were initiated at the infra-commune and at the inter-commune level in specific regions, in order to study the solving of the difficulties faced at this level (deliverable 59).

The wp6e « School » wrote the feasibility report of a European observatory of school (OEE) on the basis of the French observatory of rural school (OER) experience. The group thinking state mainly concerns the critical analysis of the OER experience, the OEE projected structure, the general functioning principles and the methodological suggestion. So to as to make the OER database perennial and to favour the evolution from OER towards OEE, the OER database was transferred on a SQL database that can be exploited with epragma. The wp6e also led broader comparative research activities on the organization of the European educational systems regarding educational laws, itineraries of the teachers’ training and systems kinds (centralized or decentralized).

The WP4 “Fundamental Methods” made a synthesis of the three reports made at the end of the second reporting period about:

- The fundamental methods and tools of spatial analysis and of territorial information processing within the social sciences and humanities in Europe (deliverables 23 and 28).

- The territorial information available on Internet and in European sources (deliverables 24 and 29).
- The notion of territory competitiveness within the sustainable development framework (deliverables 27 and 32).

This group also made a survey on the territory concept concerning the European research teams working on territory (deliverables 26 and 41).

The WP4 also started making a synthesis of the survey in progress regarding the European research teams which lead research activities on territory.

It firstly made two partial syntheses about:

- The territory concept and the analysis methods of territory and territorial information, insofar as the methods depend on the concept definition.
- The European territorial information and the indicators of territory sustainable competitiveness, as the first ones should be included in the second ones.

Regarding the first synthesis, the period from March to August 2008 was essentially devoted to follow-up the broad survey on the research practices about territory in Europe. It includes 420 teams that led research activities on territory. The research was then widened beyond the territory approaches to the methods used by these teams to analyse territory and territorial information. The results were validated on a disciplinary and territorial basis before starting the analysis. In the same prospect, the WP4 also kept studying the mapping methods and the GIS that have constituted a permanent thinking theme since the programme beginning. The previous report about fundamental methods of territory analysis was mostly devoted to the presentation of the territorial observation methods, completed by some contributions on spatial interpolation and on dynamic mapping. The importance of the mapping tools for actors, materialized by the evolution from the European portal of territorial indicators towards a webmapping tool and explained by the difficulties for actors to design and interpret relevant and useful maps, implied to study the mapping methodological bases.

Territorial competitiveness is an integrated and proactive approach to shape the future of territories, regions and larger geographic spaces. To some degree, it can also be referred to as spatial planning. Territorial competitiveness strategies can indicate how to explore the potential of economic growth and employment development and at the same time support an enhanced quality of life, by helping meeting the sustainable development challenges. Observation of territorial competitiveness helps revealing vulnerability. The essential problem is that territorially-based actors and seek to underline and maintain their regions and sub-regions utility, in reference to a a measures and indicators set conceptually suspect and often

empirically weak. The degree on which territory a competes depends on a manifold set of factors. Within the caENTI project framework, we gathered relevant indicators which indicate the social change in territories. The information must necessarily be available for spatial entities at a lower level than countries. It statistically corresponds to the European levels from NUTS 2 to LAU 1. Our research showed that the data availability is variable, depending on the considered country and on the studied year. This irrefutable fact makes the comparative analyses complex and makes any certainty about the data availability null and void. Moreover, if the major indicators are on EUROSTAT, others are missing or need to be calculated. The WP4 selected the indicators and themes that can be used within the HSS and by the caENTI actors. Seven themes were suggested: Contextual data, People, Socio-economic conditions, Employment, Housing, Health and Education. In the same time, the environmental dimension was included within the reflexion. Five indicators were chosen for the national level: generated municipal waste, electricity consumption by households, greenhouse gas emissions, modal split of passenger transport, built up areas.

Then, the WP4 made a global synthesis (deliverable 33).

The **WP5 “Governance principles”** integrated its reflexions and objectives with the WP6u, WP6s and WP4t activities and reflexions.

In coordination with the former mentioned workgroups and taking into account the contents of the final version of the Quality Letter (deliverables 34 to 46 and 47), the WP5 focused on the drafting of a catalogue of participative research-action methodologies, and especially on those applicable to territorial intelligence development projects (deliverable 48), during the third reporting period first mid-term period. It also worked on the drafting of a catalogue of technological tools, and especially on those applicable to territorial intelligence development projects (deliverable 49). It also designed a video entitled “Research at territories intelligence service” that includes educational contents focusing on citizens and underlining the WP5 main conclusions. This video is subtitled in English and French. During the last caENTI mi-term period, the WP5 worked on the preparation of the catalogues and of the video.

The **WP3 “Internet Portal”** ensured the feeding of the territorial intelligence portal: news, formations, deliverables, monthly editorials, scientific monitoring. The WP3 worked in strong collaboration with the WP1 and the WP2 to organise the conference of Besançon. Indeed, it configured and managed the submission/review-process, prepared the participants registration, and organised the event recording and live cover, particularly through a specific

blog that promoted the event. The WP3 developed the Catalyse Community website to be used by the WP6. It also published tools new versions and their documentation in several languages. The WP3 participated to and prepared the editorial aspects of the on-line publication of the Territorial Intelligence Journal. Lastly, the WP3 launched a large-scale survey to evaluate the use and communication needs as regards the caENTI communication tools, with an on-line answers gathering (through ePragma). From the reports it published during the previous periods about the Intra-consortium web site (deliverable 17) and about the cooperative workspace (deliverable 18) and from the periodic progress reports (deliverables 19 and 20), the WP3 drafted the last progress report (deliverable 21) and a global report on the portal of territorial intelligence (deliverable 22).

The **WP2 “International conference”** published the acts of the conference of territorial intelligence of Huelva 2007 “*Territorial Intelligence and Governance. Participatory Action-Research and Territorial Development*”. It organized the International Conference of territorial intelligence “*Tools and methods of Territorial Intelligence*” that will took place in Besançon in October 2008. This conference was a major event for the caENTI consortium in terms of integration and joint action visibility, as it was the caENTI final conference. The scientific committee reviewed the numerous (152) communications submissions we received and drafted the programme. The organisational committee was in charge of the logistical organization of the conference that had to take into account the numerous participants we would be received. As it did for the previous conferences (deliverables 11 to 14), the WP2 published the call for papers (deliverable 15) and the acts (deliverable 16) of the conference of Besancon.

During the third reporting period, the **WP1 “Management”** participated to the organization of scientific coordination events. It also took part to the preparation of the international annual conference of territorial intelligence that took place in Besançon in October 2008. Besides, during this period the WP1 was in charge of solving administrative difficulties linked to the network coordination. It also gathered financial data concerning the fifteen participants to the caENTI project. Lastly, it was responsible for the progress of the caENTI innovation and dissemination plan. Within this framework, it mainly worked on three aspects of this issue: the protection of private life whilst creating and managing databases, the plan of the results caENTI exploitation and the protection of the caENTI network intellectual creations. After it published some periodic reports (deliverables 1 to 7), the WP1 drafted the

final financial and management report (deliverable 8), the final innovation and dissemination report (deliverable 9) and the minutes of caENTI (deliverable 10).

### ***1.3. Most important problems faced during the period.***

The review of the previous reports led us to reduce our delivery delay. To do so, we organized two kinds of activities:

- coordination meetings with precise writing objectives, so as to get useful elements in order to draft the last deliverables and reports concerning the conference Besancon 2008
- coordination meetings of the Work Packages leaders so as to follow these documents writing progress and to guarantee their delivery at the planned deadlines, at the end of the caENTI project.

At the caENTI end, we organised two “writing seminars” in January and February 2009, to finish the reports in time, consequently we did not face any problem.

### ***1.4. General prospects of caENTI***

To ensure the continuity of the caENTI actions, we started an action of prefiguration of a network of excellence in territorial intelligence.

This project that is supported by the French National Center of Scientific Research (CNRS), aims at constituting a virtual laboratory at the international scale. The tasks will be shared among the partners and will be integrated to target a common objective. A first suggestion of scientific objectives already integrates the caENTI main learnings.

Three research activities are presently planned:

- Making a multi-disciplinary synthesis of territory sciences;
- Developing territorial information and disseminating the territorial observation and spatial analysis methods, especially towards vulnerable people and territories;
- Improving the contribution of territorial information systems to equitable governance and to sustainable development, through a better integration within the territorial decision-making process.

We also started new dissemination activities:

- A Journal of Territorial Intelligence;
- A project of European master in territorial intelligence;
- A federative international website: [territoriesnet.org](http://territoriesnet.org).

## **2. SECTION 2 – WORKPACKAGE PROGRESS DURING THE PERIOD**

### **2.1. Workpackage 1 [MANAGEMENT] Management of the consortium. Workpackage leader: Amélie Bichet-Miñaro, Université de Franche-Comté (France)**

#### **2.1.1. Workpackage 1 “Management” objectives and organisation**

Since the beginning of the caENTI project, the main management objectives of each period are:

- Ensuring the global organization of the coordination meetings, including the international conferences;
- Making the financial data gathering and follow-up;
- Drafting the management and financial reports, plus the innovation and dissemination management ones since the beginning of the second reporting period;
- Drafting the general specifications about innovation and dissemination.

During the previous reporting period (from March, 1<sup>st</sup> 2007 to February, 29<sup>th</sup> 2008), the WP1 managed solving the main difficulties the consortium faced because of differences between the administrative systems of the countries involved in the project. It also managed to make the translation process more efficient, by making some punctual recruitments. Besides, we found a definitive solution to our difficulties regarding the innovation and dissemination management issue. Indeed, we decided Amélie BICHET-MIÑARO, the caENTI Manager, would collaborate with Elouan KERGADALLAN, a jurist specialized in intellectual property right who works in the Development service of the Université de Franche-Comté, on this issue. Amélie BICHET-MIÑARO would be in charge of drafting the reports on the innovation and dissemination management issue.

During the global third reporting period, Amélie BICHET-MIÑARO and Jean-Jacques GIRARDOT were the most involved people in the caENTI management. They were helped by permanent staff of the Development service and of the Institute of Humanities, Social and Environmental sciences of the Université de Franche-Comté to manage financial and administrative issues. To organise the conference Besancon 2008, Amélie BICHET-MIÑARO and Jean-Jacques GIRARDOT were mostly supported by the local organizational committee, the Institute of Humanities, Social and Environmental sciences of the Université de Franche-Comté and the caENTI participants representatives. As regards the innovation and

dissemination management, Elouan KERGADALLAN and Amélie BICHET- MIÑARO were the most involved people this activity during the third reporting period.

### **2.1.2. Workpackage 1 “Management” progress towards objectives**

During all the scientific coordination meetings, the caENTI Manager briefly presented the management state to the caENTI participants representatives. Then, they evoked together the management following steps, in particular the next gathering of financial data and the next scientific coordination meetings to be organised.

The WP1 mainly worked with the WP2 and the WP3 during this period as they jointly prepared the conference Besançon 2008. Indeed, the WP1 “Management” worked with the WP2, that included the local organizational committee, and with the WP3, that was in charge of the event cover.

During the third reporting period, we kept improving:

- The good articulation between the Work Packages, the participants and the coordinator, to facilitate the scientific and financial work and reporting;
- The closeness relation between the caENTI project coordination team and the European Commission, especially the caENTI project Scientific Officer;
- The mobilization of the participants administrative staffs, in order to be as efficient and precise as possible in the financial and management data gathering, follow-up and reporting.

The WP1 participated to the organisation of the following scientific coordination meetings:

Scientific coordination meeting of WP4, WP6i and WP6s leaders in Besançon (France) on April 24<sup>th</sup> and 25<sup>th</sup> 2008;

Scientific coordination meeting of WP4 and WP6i in Pécs (Hungary), on May 30<sup>th</sup> and 31<sup>st</sup> 2008;

Scientific coordination meeting of WP5 in Huelva (Spain) on June, 13<sup>th</sup> and 14<sup>th</sup> 2008;

Scientific coordination meeting of WP6 in Besançon (France) from June, 26<sup>th</sup> to 28<sup>th</sup> 2008;

Scientific coordination meeting of WP6 in Ljubljana (Slovenia) on September, 4<sup>th</sup> and 5<sup>th</sup> 2008;

Sixth international annual conference of territorial intelligence in Besançon (France) from October, 15<sup>th</sup> to 18<sup>th</sup> 2008;

First final reports drafting seminar in Huelva (Spain) from January, 26<sup>th</sup> to 28<sup>th</sup> 2009;

Second final reports drafting seminar in Besançon (France) from February, 16<sup>th</sup> to 18<sup>th</sup> 2009;

Lastly, the caENTI WP1 was in charge of solving the administrative difficulties linked to the coordination of an international network, of gathering and following-up the financial data concerning the caENTI participants and of working on the caENTI plan of innovation and dissemination.

The caENTI management and financial report is the specific object of deliverable number 8.

The minutes of all the caENTI coordinations meetings, seminars and conferences are presented in the deliverable number 10.

### **2.1.3. Workpackage 1 “Management” deviations from the project workprogramme**

The situation improved much since the beginning of the Coordination Action as regards the difficulties we had to gather the financial data we requested from the caENTI participants in time.

Besides, we managed being each time more efficient regarding the translation to English of the reports, deliverables and work documents.

### **2.1.4. List of drafted deliverables of workpackage 1 “Management”**

<b>Del. n°</b>	<b>Deliverable name</b>	<b>WP n°</b>	<b>Date due</b>	<b>Delivery date</b>	<b>Estim. P/M</b>	<b>Used P/M</b>	<b>Lead contractor</b>
D01	First midterm activity progress report	1	6	6	1	2,5	UFC
D02	First periodic management and financial report	1	12	12	3	4	UFC
D03	First periodic IDM report	1	12	12	0,5	1	UHU
D04	Second midterm activity progress report	1	18	18	1	2	UFC
D05	Second periodic management and financial report	1	24	24	3	4	UFC
D06	Second periodic IDM report	1	24	24	0,5	1,5	UHU
D07	Third midterm activity progress report	1	30	30	1	2	UFC
D08	Final management and financial report	1	36	36	4	4	UFC
D09	Final IDM report	1	36	36	1	2,5	UHU

D10	Minutes for all meetings of CAENTI.	1	36	36	2	2	UFC
					17	25,5	

### **2.1.5. The prospects of workpackage 1 “Management”**

During the preparation of the future project that will continue the caENTI work, the Management team will support the scientific responsables as regards the administrative, financial, legal and innovation and dissemination issues.

## ***2.2. Workpackage 2 [Conference] Annual International Conference of Territorial Intelligence. Workpackage leader : Mihai Pascaru-Pag (Universitatea 1 decembrie 1918 Alba Iulia)***

The annual international conference is a major event for the caENTI consortium in terms of integration and joint action visibility. This part presents the workpackage objectives and organization, the progress towards objectives, the deviation for the project workprogramme, the list of deliverables and the prospects after caENTI.

### **2.2.1. Workpackage 2 “Conference” objectives, starting point and organisation**

#### **2.2.1.1. Objectives**

Main objective of the annual international conference of territorial intelligence is gathering all the european network members with other researchers and territorial actors in order to exchange information about the past working and research year, have debates on progress and prospects. It guarantees the transparence of the project through common decision-making procedures. Each activity is invited to make a report on its work during the past year, to enlarge its thinking state and to debate with all consortium members.

It also have other objectives:

- Allowing detailing and tuning the territorial intelligence concept that is in the core of the project
- Confronting researchers’ and actors’ visions.
- Collectively evaluating the efficiency of management, of organisational device and of the tools developed for sharing formation and working in a collaborative way.
- Collectively evaluating dissemination device, either online or under paper shape, to inform the consortium members, and more generally the scientific community interested in the project issue.

- Guaranteeing the scientific work quality by formulating advice for the Scientific Committee, year after year, according to the works progress.

caENTI also aims to favour contacts and collaboration with other international research teams to constitute a European network of excellence after caENTI.

#### **2.2.1.2. Starting point**

Before caENTI, three international conferences on territorial intelligence were took place in:

- Besançon, organised by the Université de Franche-Comté, from 4 to 6 september 2003, on the topic « *Territorial Intelligence* »
- Pecs, organised by the University of Pecs, from 20 to 22 mai 2004, on the topic « *Knowledge and governance of territories* »
- Liege, organised by the University of Liege, 20-21 October, 2005, on the topic « *Territory, well-being and social inclusion* »

#### **2.2.1.3. Organisation**

The organisation of the three conferences of territorial intelligence was managed by the University “1er decembrie 1918” Alba Iulia.

Initial organization consisted in a Scientific Committee and an Organisational Committee.

The Scientific Committee represents the network, it drafts calls for proposals and reviews proposals of paper and papers.

The Organisational Committee coordinated the conferences organisation with a local committee for each conference in order to harmonize conferences supported by caENTI.

Ioan ILEANA was in charge of proceedings publishing. During caENTI, he carried out videos realization and onlining assumed the relisation and putting on line of the video.

##### **2.2.1.3.1. Scientific Committee**

The Scientific Committee is composed of a five-member Bureau and of 21 other members. The Bureau emanates from the Committee. The Bureau plans the meetings and the work organization.

##### **2.2.1.3.2. Bureau**

1. Moise Ioan ACHIM, *president of the Scientific Committee*, Ph.D., professor of topography and geodesy, rector of Universitatea “1 Decembrie 1918” Alba Iulia, UAB Romania

2. Jean-Claude DAUMAS, *vice-president of the Scientific Committee*, Ph.D., professor of modern economic history, director of the doctoral department “Lettres, Espaces, Temps, Sociétés” (Humanities, Spaces, Time, Societies), deputy-chairman of the French Economist Historians Association, UFC France

3. Dolores REDONDO TORONJO, Ph.D., professor of social policy, UHU España

4. Jean-Jacques GIRARDOT, Ph.D., associate professor of economics, scientific coordinator of CAENTI, representative of the Université de Franche-Comté, leader WP6 Tools for Actors, UFC France.

5. Mihai PASCARU-PAG, PhD, professor of sociology, director of the CCDT “Centrul de Cercetari pentru Dezvoltare Teritoriala” (Research Center for Territorial Development), representative of the Universitatea “1 Decembrie 1918” Alba Iulia, leader of WP2 Annual international Conference of Territorial Intelligence, UAB Romania.

### **2.2.1.3.3. Members**

1. François FAVORY, Ph.D., professor of ancient history and archaeology, director of the MSH “Maison des Sciences de l'Homme” (Institute of humanities and social sciences) Ledoux UMS CNRS, UFC France

2. Serge ORMAUX, Ph.D., professor of geography, director of the research unit Théma “Théoriser et Modéliser pour Aménager” (Theorize and Model to Develop territories), Leader of the research group on Methods in WP4, UMR CNRS, UFC France

3. Luc GRUSON, professor of management, director of the CNHI “Cité Nationale de l'Histoire de l'Immigration” (National museum for immigration history), UFC France.

4. Blanca MIEDES UGARTE, PhD, associate professor of labour economics and active employment policies, representative of Universidad de Huelva, leader of WP5 Governance, UHU Spain

5. Manuela DE PAZ BAÑEZ, PhD, professor of economical structure and world economy, director of Research in the Techniques and Economical Development research team and of OLE “Observatorio Local de Empleo” (Local employment observatory), UHU Spain.

6. Guénaél DEVILLET, research engineer, deputy manager of SEGEFA “Service d'Étude en Géographie Économique Fondamentale et Appliquée” (Office for study of fundamental and applied economical geography), representative of the Université de Liège, leader of the research group on territorial information in WP4, ULG Belgium

7. Bernadette MERENNE-SCHOUMAKER, professor of economical geography and geography didactics, director of the SEGEFA and of the “Laboratoire de Méthodologie de la Géographie” (Laboratory of Geography Methodology), ULG Belgium

8. Serge SCHMITZ, associate professor of geography, specialist in cultural and political geography, ULG Belgium

9. Csilla FILO, assistant professor of sociology, representative of the University of Pécs, leader of the WP4 fundamental methods, PTE Hungary.

10. Zoltan WILHELM, Ph.D., senior lecturer in geography, director of RTTD&ICT “Research Team on Territorial Development and Information & Communication Technologies”, PTE Hungary.

11. . Ioan ILEANA, PhD, professor of computer sciences, leader of the acts publication of the Annual International Conference of Territorial intelligence, UAB Romania.

12. Natale AMMATURO, Ph. D., professor of general sociology, director of the research unit Methodology and Technique of Social Research and Sociology of Cultural Processes, manager of the scientific review "Research and Development of Social Policies", Representative of the Università di Salerno, UNISA, Italy

13. Pierre CHAMPOLLION, Ph.D. of geography and education sciences, inspector of national education, member of the "Observatoire de l'École Rurale" (observatory of rural school), leader of the research group on the territory concept in WP4, UNISA Italy.

14. Yves ALPE, PhD of sociology, member of the "Observatoire de l'École Rurale" (observatory of rural school), UNISA Italia.

15. Kristof OSTIR, Ph. D., researcher, representative of the Scientific Research Centre of the Slovenian Academy of Sciences and Arts, ZRCSAZU, Slovenia

16. Ruey-Ming TSAY, Ph.D., professor of sociology, director of the ISSP Information System for Social Policy research unit, Representative of Tunghai University, THU Taiwan.

17. Julia FERNANDEZ QUINTANILLA, general manager and representative of the Asociación Comisión Católica Española de Migración (Spanish catholic commission association for migrations), ACCEM España.

18. Jean-Marie DELVOYE, manager and representative of the community observatory Optim@ "Observation, Participation, Territory, Integration, Methods, and Action", OPTIMA Belgique.

19. Christiane MARECHAL-RULOT, manager and representative of the inter-communal observatory Intégra Plus, INTEGRA Belgique.

20. Jean-Guy HENCKEL, manager and representative of the association "Réseau Cocagne", COCAGNE France.

#### **2.2.1.4. Organisational Committee**

The Organisational Committee is made up by 7 permanent members, who coordinated each caENTI conference with a local committee in order to harmonize conferences organisation.

1. Mihai PASCARU-PAG, UAB, leader of the Organisational Committee
2. Isabelle MOURET, UFC
3. Pascal BERION, UFC
4. Blanca MIEDES UGARTE, UHU
5. Jean-Pierre MULLER, ADAPEI
6. Maria Isabel FRANCO LIGENFERT, VALDOCCO
7. Gabor POLA, BARANYA

#### **2.2.2. Workpackage 2 "Conference": progress towards objectives**

During caENTI, three international conferences on territorial intelligence were organised with caENTI support in:

- Alba Iulia, organised by the University “1<sup>er</sup> decembrie 1981” of Alba Iulia, from September 20<sup>th</sup> to 23<sup>th</sup> 2006 on the topic « *Region, identity and sustainable development* »

- Huelva, organized by the University of Huelva, from October, the 24<sup>th</sup> to the 26<sup>th</sup> 2007 on the topic « *Territorial Intelligence and Governance Participative research-Action applied to territorial development* »

- Besançon, organized by the University of Franche-Comté, from October, the 15<sup>th</sup> to the 17<sup>th</sup> 2008 on the topic « *Tools and methods of Territorial Intelligence* » according to the caENTI objective.

### **2.2.2.1. Alba Iulia 2006 conference**

The call for paper with specific organisation of the Alba Iulia 2006 conference was published in the deliverable 11.

The first CAENTI conference was organized in Alba Iulia (Romania), with the topic “ *Region, identity and sustainable development* ” from 20<sup>th</sup> to 23<sup>rd</sup> September, 2006. More than 100 researchers and territorial actors attended this event.

The choice of the conference general topic was based on the fact that, at the middle of the twentieth century, regional policy became part of the social and economic policy of the European Community. Since the 1970’s, regional policy has been developed according to new strategic views. It aims at achieving sustainable development and is based on strengthening local and regional identities in Europe.

Considering that, the three topics proposed for debate within the conference were:

1. Is region the most appropriate space to think sustainable development?
2. Construction of regional identity. Problems, experiences, best practices.
3. Methods and generic tools to study and manage sustainable territorial development.

The Conference began on Wednesday, 20 September 2006, with caENTI Steering Committee meeting, coordinated by Jean-Jacques Girardot. In the afternoon, reports of the scientific, organising and editorial committees were presented.

An other activity was the analysis of the Internet portal of the project and the launching of *CooSpace*, a cooperative workspace.

On Thursday, 21 September, the Conference began with lectures of the invited speakers: Philippe Dumas, Director of I3M Laboratory, Université du Sud, Toulon, France; Laura Garcia Victoria, European Institute of Ethics and Sustainable Development; Daniela

Constantin, Bucharest Academy of Economic Studies, chairman of the Romanian Association of Regional Sciences.

A major part of the Conference was dedicated to debates within CAENTI workshops, where the main results of the project's first year were analysed and the activities for the following two years planned.

The debates on the three major topics of the CAENTI Conference gathered researchers associated to the CAENTI project, as well as other territorial actors and scientists not directly involved in the project. More than 30 scientific papers were presented.

The acts constitute the deliverable 12.

#### **2.2.2.2. Huelva 2007**

The call for paper with specific organisation of the Huelva 2007 conference was published in the deliverable 13.

The acts constitute the deliverable 14.

The International Conference of Territorial Intelligence of HUELVA « Territorial Intelligence and Governance Participative research-Action applied to territorial development » took place from October, 24<sup>th</sup> to 26<sup>th</sup>, 2007.

The main objective of this Conference, besides intensifying cooperation between the network members, was to debate with other members of scientific community and other territorial actors involved in issues linked to territories sustainable development, territorial intelligence, territorial governance and the links between all these concepts. The topic of this conference was based on idea that researchers' and territorial actors' effective and long-term participation is the key-element to understand territorial dynamics and to look for solutions to main territories problems.

On this basis, three thinking and debates themes were presented:

- A. Participative research-action applied to sustainable territorial development.
- B. Application of participative reaserach-action methods and tools to territorial sustainable development.
- C. Analysis of the research-action experiences applied to territorial projects diagnosis, planning, management and evaluation.

The conference was organized by the Universidad de Huelva and received 130 participants from 11 countries, with 50 communications and 104 authors.

October, on caENTI main working orientations until the project end in February 2009. Then, the workpackages meetings (one for each workpackage) allowed drawing conclusions about the research activities programming till the project end in February 2009.

October, 25<sup>th</sup> : the day started with two invited conferences, the first one *The challenges of the worldwide governance* was presented by Professor Carlos BERZOSA, Rector of the Universidad Complutense de Madrid and President of the Worldwide Economics Society, and the second one by Professor Tomas RODRIGUEZ VILLASANTE, an expert recognized at the international level in the field of participative methodologies applied to development. The afternoon was devoted to the debate on caENTI scientific results already achieved and to the presentation of the work guidelines until the end of the coordination action. At the end of this day, the territorial research-action Letter of Quality, drafted by the caENTI actors and researchers within the Workpackage 5 framework, was presented.

The morning of October, 26<sup>th</sup> was devoted to six workshops presenting communications submitted by participants. In the afternoon, two plenary sessions allowed debating on two other key-issues linked to the conference thematic. The first one was the broader one, it concerned the relation between university and territorial actors within the framework of research-action projects; the moderator was Professor Manuela DE PAZ BANEZ, professor in the Universidad de Huelva and director of the Observatorio Local de Empleo (Local Observatory of Employment). The other thematic was more specific; it regarded the ethic and organizational problems posed by the use of the new technologies in information processing in the research-action projects. The debate moderator was Doctor Cyril Masselot of the Université de Franche-Comté, a researcher who has a long-term experience in this field.

### **2.2.2.3. Besançon 2008 conference**

The call for paper with specific organisation of the Besançon 2008 conference was published in the deliverable 15.

#### **2.2.2.3.1. Local scientific committee**

Jean-Philippe ANTONI, lecturer in space settlement and town-planning, ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

Pascal BÉRION, lecturer in space settlement and town-planning, ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

Yann BERTACCHINI, lecturer in information and communication sciences, laboratory I3M, "Information, Milieux, Médias, Médiations " EA 3820 de l'Université du Sud Toulon Var, France.

Thierry BROSSARD, research director CNRS (géography), ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

Catherine CAILLE, lecturer in geography, ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

Sylvie DAMY, lecturer in computer science, Laboratory of Computer science EA 4157 of the Université de Franche-Comté, France.

Marie-Hélène de SEDE-MARCEAU, professor of geography, ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

Edwige DUBOS-PAILLARD, lecturer in geography, ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

Jean-Christophe FOLTETE, professor of geography, ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

Jacques FONTAINE, lecturer in geography, ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

Pierre FRANKHAUSER, professor of geography, ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

Anne GRIFFOND-BOITIER, lecturer in geography, ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

Ahmed HAMMAD, lecturer in computer science, Laboratory of Computer science, EA 4157 of the Université de Franche-Comté, France.

Bénédicte HERRMANN, lecturer in computer science, Laboratory of Computer science, EA 4157 of the Université de Franche-Comté, France.

Hélène HOUOT, lecturer in geography, ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

Daniel JOLY, research director CNRS (geography), ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

Alexandre MOINE, professor of geography, ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

Isabelle MOURET, docteur en histoire sociale, secrétaire générale de la MSHE Ledoux USR 3124 CNRS and Université de Franche-Comté, France.

Laure NUNINGER, CNRS researcher (spatial archaeology), Université de Franche-Comté, France.

Richard STEPHENSON, lecturer in applied foreign languages, ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

Cécile TANNIER, CNRS researcher (geography), ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

François-Pierre TOURNEUX, lecturer in geography, ThéMA “Théoriser et Modéliser pour Aménager” UMR 6049 CNRS and Université de Franche-Comté, France.

#### **2.2.2.3.2. Organisational committee**

Pascal BÉRION, lecturer in space settlement and town-planning, TheMA UMR 6049 CNRS and Université de Franche-Comté, France.

Amélie BICHET-MINARO, caENTI manager, MSHE Ledoux USR 3124 CNRS and Université de Franche-Comté, France

Sophie BUI, communication, MSHE Ledoux USR 3124 CNRS and Université de Franche-Comté, France.

Marie GILLET, publications, MSHE Ledoux USR 3124 CNRS and Université de Franche-Comté, France.

Jean-Jacques GIRARDOT, caENTI scientific coordinator, TheMA UMR 6049 CNRS et Université de Franche-Comté, France.

Jean-Guy HENCKEL, president of the association “Jardins de Cocagne”, caENTI participant, France.

Marion LANDRÉ, scientific mediation, MSHE Ledoux USR 3124 CNRS and Université de Franche-Comté, France.

Mattieu LATROY, network administrator and technological platform, MSHE Ledoux USR 3124 CNRS and Université de Franche-Comté, France.

Cyril MASSELOT, coordinator of the caENTI communication, Laboratory of Sémio-Linguistic, Didactic and Computer Science, Université de Franche-Comté, France

Isabelle MOURET, secretary-general, MSHE Ledoux USR 3124 CNRS and Université de Franche-Comté, France.

Anne PERETZ, responsible for quality, Association ADAPEI, caENTI participant, France.

Eddy PETIT, caENTI editorial responsible, MSHE Ledoux USR 3124 CNRS and Université de Franche-Comté, France

Richard STEPHENSON, lecturer in applied foreign languages, TheMA UMR 6049 CNRS and Université de Franche-Comté, France.

Jérôme VALANCE, computer science engineer, TheMA UMR 6049 CNRS and Université de Franche-Comté, France.

#### **2.2.2.3.3. Programme**

**Tuesday, October 14<sup>th</sup>: Welcome early birds 16h.**

**Wednesday, October 15<sup>th</sup>: caENTI coordination meetings**

October, the 15<sup>th</sup> was devoted to the planning of caENTI activities, but it was open to all, ideas, critics and suggestions of researchers and actors, involved or not in the caENTI. It was especially devoted to the management and diffusion activities: the annual international conference and the portal <http://www.territorial-intelligence.eu>. This year, we also wanted to define the caENTI prospects, and especially the preparation project of a network of excellence within the framework of the 7<sup>th</sup> FPRD. All interested researchers were kindly invited to attend the corresponding session.

**[09:00 – 11:00] caENTI Steering Committee, assembly room MSHE Ledoux.**

The Steering Committee attendance was limited to the representatives of the caENTI consortium' participants, with one representative for each participant. It took place in the presence of M. Luca Rizzo, scientific officer to the Directorate General "Research" of the European Commission. Work packages managers, who were not representatives, were also invited.

- Scientific management: Research activities led, in process and to be made (Jean-Jacques Girardot)

- Financial management: Overview of expenses and money transfers. Modifications made and to be made (Amélie Bichet-Minaro)

- Dissemination of the caENTI scientific results (Amélie Bichet-Minaro)

[09:30] *caENTI participants registration*

From 9h30 to 11h, we welcome the caENTI participants and other people who would attend the day 15<sup>th</sup>.

#### **[11:00] Final programming and prospects of caENTI**

Animation: Jean-Jacques Girardot. Report: Amélie Bichet, Blog: Eddy Petit and Rémi Thomas

Jean-Jacques Girardot. Introduction to the programming of caENTI final phase and prospects

[12:00] *Buffet: "caveau Crous (Lunch-meeting of the Steering Committee, organic food by Cognition, assembly room ThéMA)*

#### **[13:30] Debate on general programming of caENTI final phase and prospects**

Animation: Jean-Jacques Girardot. Report: Amélie Bichet, Blog: Eddy Petit and Rémi Thomas

**[13:30] Communication and dissemination** (WP2 and WP3, animation: Cyril Masselot, reporting: Anne Pignonier)

- Programming of the Besancon 2008 acts edition and publication on the territorial intelligence portal <http://www.territorial-intelligence.eu>

- Next international conference of territorial intelligence

- Evolution of the portal (Eddy Petit)

- Communication evaluation (Anne Pignonier)

- Dissemination of caENTI results (Amélie Bichet-Minaro)

- Journal of territorial intelligence: editorial chart, editorial committee and reading committee (Philippe Dumas)

**[14:30] Fundamental methods** (WP4, animation: Csilla Filo, reporting: Serge Ormaux)

- European repertory of research teams on territories and documentary base linked to the territory concept (analysis follow-up, interpretation, expertise committees)

- International widening of the repertory of research teams on territories

- Synthesis on territorial information and on competitiveness indicators

**[15:00] Governance principles** (WP5, animation: Blanca Miedes Ugarte, reporting: Laurent Amiotte-Suchet)

- Debate on tools potentialities and limits

- Debate on participative methods and tools
- Video on research-action in territorial intelligence

*[15:50] coffee break (hall of the Parisiana building)*

**[16:10] Tools for and by actors** (WP6, animation: Jean-Jacques Girardot, reporting: Celia Sanchez)

- Latest homogenisation of the individual diagnosis and evaluation guide according to experiences of the observatories network managed by Accem and Chapelle-lez-Hairlaimont, services repertory, territorial indicators
- Programming of the web-mapping at the communal level and of experimentations at the infra-communal level (Christophe Breuer)
- Programming of the blog Catalyse: tools and documentation (Cyril Masselot)
- Programming of the development of the community systems of territorial intelligence
- Base of territorial intelligence projects: document rewriting, publishing level
- Experimentations follow-up, actors' work group

**[17:10] Synthesis and other prospects** (animation: Jean-Jacques Girardot)

- territoriesnet.org
- Programming of the submission of an Erasmus mundus project for a European master of territorial intelligence
- Dissemination seminar in Brussels.

**[17:30] End of session**

*[17h45] Visit of Besançon: Jean-Claude Wieber, emeritus professor of Geography (starting in front of the MSHE)*

*[20h00] Dinner Adapei Tilleroies, 41 chemin du sanatorium, transport by a specific bus. Departure of the bus Granvelle stop, at 20h)*

**Thursday, October 16<sup>th</sup>**

Plenary sessions

[08:30] Reception of participants

**[09:30] Opening sessions**

Université de Franche-Comte

Conseil Régional de Franche-Comté

Antonio Gonsales – Faculty of Humanities and Social sciences, UFC

General Directorate of the European Commission

Isabelle Mouret – Logistical organisation of the conference

**[10:30] Invited conferences**

President: François Favory, director of the MSHE Ledoux – Report: Philippe Dumas - Blog Cyril Masselot

[68] 10:30 **Horacio Bozzano**. Professor in “Methods and techniques of geographic research activity” in the National University of La Plata in Argentina. Real problems, theoretical-methodological criteria and projects development. An experiment in Latin America

[110] 11:10 **Florent Joerin**, Professor in the University Laval, has tenure of the Canadian research chair in help to territorial decision-making. Territorial information and decision-making process

[111]11:50 **Évelyne Brunau**. General Director of the so-called association “Relais-Emploi” in Strasbourg. In which measure observation is useful for territorial action?

[13:00] *Buffet at the « caveau CROUS »*

### **14:00 The caENTI scientific progress, results and prospects**

President: Serge Ormaux, Report: Blanca Miedes, Blog: Cyril Masselot

Table: Jean-Jacques Girardot, Csilla Filo, Mihai Pascaru Pag

[81] Jean-Jacques Girardot. The caENTI scientific progress, results and prospects

### **Thematic workshops, session 1, 15:00 - 16:50**

#### **A14c - From action to theory: a local construction of territorial intelligence - room P4**

Animation: Patrick Deloustal – Report and blog: Philippe Signoret and Lydie Verdant

[37] Patrick Deloustal and Laurent Segura. PRO-ACT: a step to observation and territorial anticipation integrating actors’ perception.

[38] Alain Campredon. From Equal acts: tools and methods as lessons and conditions of renewals for local developments.

[39] Anthony Fremaux: A cartography of competences and knowledge: a mediator, object of collective intelligences?

#### **B15c – Participative methods and tools (I) - room P5**

Animation: Tullia Saccheri - Report: Blanca Miedes Ugarte - Blog: Stephan Kamps and Joachim Wyssling

[22] Khosro Maleki: Policy Delphi as a method of participatory governance

[34] Guénaël Devillet, Mathieu Jaspard, François Laplanche and Bernadette Merenne-Schoumaker. Towards a participative tool of decision-making aid as regards retail location.

[95] Horacio Bozzano. Territorial "entendimiento" (understanding), participative processes and territorial planning: experiences in Latin America. The network [www.territorios posibles.org](http://www.territorios posibles.org) as part of [www.territoriesnet.org](http://www.territoriesnet.org).

#### **C16c - The concept of territorial intelligence (I) – room P6**

Animation: Philippe Dumas- Report: Cyril Masselot - Blog: Kawtar Najib and Claire Pernot

[3] Annie Humbert-Droz Swezey. The concept of territorial intelligence : contributions from the Council of Europe

[13] Stéphane Gorla: Intelligence management and territory notion for an investigation of territorial intelligence conception.

[55] Loreto Saavedra and José Luis Piñuel. Intelligence for territorial intelligence.

[17] Samuel Widmer. Which territorial intelligence for the sustainable development of urbanized territories ?

[30] Samuel Widmer. Synthesis picture: territorial intelligence for sustainable development (poster)

### **B1pc – Territory knowledge - *amphitheatre Jacques Petit***

Animation: Serge Ormaux - Report: Christophe Breuer – Blog: Camille Chanard and Raluka Balan

[4] Philippe Herbaux. Anticipation and territory: does collecting information need “ordinary individual”?

[7] Sophie Lacour. The complexity of the production of information in a step of territorial intelligence in a sector where sources are pluri-disciplinary and of multisector information: the example of performing heritage

[61] Serge Gagnon. For an objective knowledge of spatial dynamics : presentation of a methodology and of two examples from Quebec.

[135] Pascal Bérion. Observation of the effects of the big transports infrastructures: methods, practices and results.

### **Thematic workshops, session 2, 17:10 – 19:00**

#### **A24c – Participative methods and tools (II) – room P4**

Animation: Tullia Saccheri – Report: Calina Ana Butiu - Blog: Stephan Kamps and Thomas Morel

[33] Guénaël Devillet, Christophe Breuer and Bernadette Mérenne-Schoumaker. Emergence of a territory project for the districts of Huy and Waremme (Belgium): tools, participation and construction.

[40] Calina Ana Butiu. Approaching the territory as a space of action. Predictors of the participation in the Livezile-Rimitea micro-region (Romania).

[46] Marina Lucian. Including the inhabitants' options in a process of territory regeneration for the Vauban-type citadel in Alba Iulia.

[57] François Baulard: Social and solidarity economy: observation identity, dynamic and stakes

#### **B25c – Observation tools and territorial analysis – room P5**

Animation: Horacio Bozzano- Report: Jean-Luc Fauguet - Blog: Yann Fléty and Marion Landeta

[20] Philippe Signoret and Alexandre Moine. A concept of the territory implemented in and by observation.

[24] Kristof Ostir and Laure Nuninger. Confidence maps: a tool to evaluate social studies data's relevance in spatial analysis.

[64] Adel Adjoudj. Key Technologies 2010. An analysis of regional opportunities in Paca

[136] Pascal Bérion, Alain Sauter and Souleimane Thiam. Observation of the DiACT mountain territories: presentation and purposes.

#### **C26c- The territorial intelligence concept (II) – room P6**

Animation: Philippe Dumas - Report: Serge Schmitz – Blog : Christophe Breuer and Valérie Drezet

[41] Mihai Pascaru: The principles of territorial intelligence. Proposals for exploratory operationalisation and research in the Livezile-Rimetea micro-region (Romania)

[124] Yves Alpe et Jean-Luc Fauguet. Territorial intelligence from the sociological point of view: How territorial data production transforms the actors' status?

[8] Emiliana Mangone: The Community and Communitarian Development Models.

[62] Peter Ács. Theoretical approach of territorial intelligence and communication

[101] Blanca Miedes. Territorial intelligence and the three components of territorial governance

### **A28o – Catalyse tools integration – demonstration - computer science room P8**

Animation: Cyril Masselot - Report: Sylvie Damy and Bénédicte Herrmann - Blog: Guillaume Poulet and Aurélie Battinger

[139] Cyril Masselot, Sylvie Damy, Bénédicte Herrmann, Jonathan Bénilan, Rémi Thomas, Marc Ramage, Eddy Petit. Progress and prospects of Catalyse tools Integration.

[131] Jonathan Bénilan. A cross-platform and multi-language version of Pragma in Java: jpragma (demonstration)

[137] Rémi Thomas. Progress and prospects of the e-pragma on line version (demonstration)

[138] Marc Ramage. Integration of Anaconda and Nuage in a cross-platform and multi-language version and articulation with the e-anaconda on line version (demonstration)

[83] Cyril Masselot and Eddy Petit. CMS Catalyse and Catalyse community blog (demonstration)

[19h30] Reception in Besançon town hall (room Courbet, 6 rue Mégevand)

Free evening

### **Friday, October 17<sup>th</sup>**

#### **Thematic workshops, session 3, 08:30 - 10:20**

### **B34c – Methods and tools for sustainable development – room P4**

Animation: Zoltan Wihelm - Report and blog: Richard Stephenson

[14] Amélie Bonard, Amélie Lafragette and Emilie Dridi-Dastrevigne: Sustainable development assessment tools dedicated to territorial collectivities

[15] Florian Julien-Saint Amand and Patricia Le Moenner: Industrial Ecology, an Innovative Approach Serving Spatial Planning: the Example of the Tool PRESTEO© (A Program to Research Synergies on a Territory).

[45] Elizabeth Gardère and Jean-Philippe Gardère. Network and multimodality in Bordeaux. Sustainable strategy and technological choices.

### **A35s – Collaborative methods and tools for partnership (I) – room P5**

Animation: Mihai Pascaru - Report: Serge Schmitz - Blog: Camille Chanard and Lydie Verdant

[29] Pierre Champollion and Alain Legardez: Territorial intelligence at work: a cooperative and partnership step of territorial diagnosis gathering actors and researchers

[16] Eve Ross. A collaborative environment for urban and architectural design

[23] Filimon Stremtan. Some considerations regarding collective intelligence

### **C36c- The territorial intelligence concept (III): the factors – room P6**

Animation: Philippe Herbaux - Report: Yves Alpe – Blog: Igor Agbossou and Claire Pernot

[12] Natale Ammaturo: The Culture of socio-economic cohesion

[19] Maryse Salles and Gabriel Colletis : How to deal with the conflicting views of the world expressed in regional economic development policies?

[54] Jean-Marc Rouchon. Territorial intelligence: towards the integration of the subsidiarity principle? (demonstration)

[49] Julien Angelini, Marie-Michèle Venturini and Yann Bertacchini. Citizens regaining and lived solidarity: towards the link structuring

### **A3pc - Territorial information systems - amphitheatre Jacques Petit**

Animation: Jean-Jacques Girardot - Report: Cyril Masselot – Blog: Cécile Tannier and Aurélie Saillard.

[82] Jean-Jacques Girardot and Cyril Masselot (UFC): Specifications for the Territorial Intelligence Community Systems (TICS)

[90] Sylvie Damy and Bénédicte Herrmann: Metadata for the caENTI.

[145] Antonio Moreno Moreno: Data processing protocols within the framework of a territorial intelligence system

[115] Amélie Bichet-Miñaro - Private life protection, intellectual right protection and tools dissemination.

### **Thematic workshops, session 4, 10:40 - 12:30**

#### **A44s - European portal of territorial indicators – synthesis workpackage, room P4**

Animation: Guenaël Devillet - Report: Kristof Ostir – Blog : Yael Kouzmine and Aurélie Saillard.

[86] - Christophe Breuer and Guénaël Devillet. Contribution to the applied territorial intelligence: reasoned catalogue of territorial information available on internet and sources in Europe

[87] Guénaël Devillet and Christophe Breuer. Territorial information, shapefiles and indicators accessible for actors until commune level

[88] Guénaël Devillet and Christophe Breuer. Territorial information, shapefiles and indicators accessible for actors at infra communal levels

[25] Csilla Filó: Indicators of territorial competitiveness

[59] Olga Mínguez Moreno: Environnemental indicators as contextual information for the territorial actors

[28] Peter Pehani and Marion Landré. Interactive map for caENTI Application of the web-mapping technology

#### **B45c – Observation tools and territorial analysis – rooms P5 et P8**

Animation: Natale Ammaturo - Report: Philippe Signoret – Blog : Guillaume Poulet and Mélanie Dral

[27] Hélène Avocat and Camille Chanard and Marie-Hélène de Sède-Marceau. Conception of a territorial observation and prospective tool for energy. The case of fuelwood.

[140] Andrea Barbieri. Transitions towards capable territories. Community development and social development

[122] Michel Philippon. Mediacion bâtiment Equal II. Evaluation of the representations of the building jobs and tools to follow-up the recipients.

[67] Souleymane Thiam and Philippe Signoret. An observatory shared on the web: OSER70.

**B46s - Scientific methods and generic tools of territorial intelligence – synthesis workshop, room P6**

Animation: Serge Ormaux – Report: Giovana Truda - Blog: Philippe Signoret and Joachim Wyssling

[146] Serge Ormaux and Csilla Filo. Fundamental methods and generic tools for territorial intelligence

[147] Monica Mollo. The survey on territory research in Europe

[94] Alexandre Moine and Marie-Hélène De Sède. Observation: concept and implications.

[58] Fang-Yie Leu and Yao-Tien Huang: Software tools developed for survey on central Taiwan science park and their analyse.

**B4pc – Territorial intelligence tools and governance principles – amphitheatre Jacques Petit**

Animation: Blanca Miedes Ugarte – Report: Laurent Amiotte-Suchet – Blog: Alain Sauter and Valérie Drezet

[142] Blanca Miedes Ugarte. Performing the caENTI quality letter on action-research

[143] Blanca Miedes Ugarte. A video on research action

[141] Laurent Amiotte-Suchet. Possibilities of ICT and tool limits relative to sustainable development, participation and partnership

[144] Tullia Saccheri. Participative methods for territorial intelligence

[12:30] Buffet at the « caveau CROUS »

### **Thematic workshops, session 5, 14:00 - 15:50**

**B54c –Territorial observation and landscape – salle P4**

Animation: Serge Ormaux - Report: Philippe Woloszyn - Blog: Samy Youssoufi and Maud Bottagisi

[44] Philippe Woloszyn and Gaëtan Bourdin: The Hyperscape project : participative game informational construction.

[43] Philippe Woloszyn and Gaëtan Bourdin: The Hyperscape project: the landscapes observatory (tools demonstration)

[65] Alain Sauter, Serge Ormaux and François Pierre Tourneux. Landscape and public policies : evaluation and indices

[42] Catherine Caille-Cattin: The need to share landscaped information to draft common territory projects (poster)

**A55c - Project of European observatory of elementary school– room P5**

Animation: Yves Alpe – Report: Giovanna Truda – Blog: Richard Stephenson

[103] Yves Alpe and Jean-Luc Fauguet. Results of OER and prospects of RES

[35] Giovanna Truda: The European educational systems: a comparison.

[104] Catherine Caille-Cattin, Ahmed Hammad, Jean-Louis Poirey and Rémi Thomas. Integration of the OER database in the epragma system.

**A55s - Observation tools for and by actors of South countries– room P6**

Animation: Alexandre Moine – Report: Horacio Bozzano- Blog: Hélène Avocat and Claire Pernot

[134] Yaël Kouzmine, Tayeb Othmane, Badr-eddine Yousfi. The territorial dynamics of the South-West Saharian in Algeria.

[84] Claude Etienne Sissao. Local governance and communalisation the implementation of the good governance principles in the communalisation context, the case of Douroula in Burkina-Faso.

[108] Tchaa Boukpepsi and Yann Fléty. Sacred woods, a threatened biodiversity tank. (poster).

[109] Tchaa Boukpepsi. .Social and economic role of the sacred woods of the center of Togo.

**A5ps - The uses of territorial intelligence tools (I) – synthesis workshop, amphitheatre Jacques Petit**

Animation: Dolores Redondo Toronjo - Report: Blanca Miedes Ugarte – Blog: Cécile Tannier and Aurélie Battinger

[60] Celia Sanchez Lopez. Uses of the territorial intelligence tools within the development partnerships. The European repertory of territorial intelligence projects.

[18] Laurence Meire, Jean-Marie Delvoye, and Carine De Noose. Transfer of an exploratory observation starting from the European guide : Chapelle-lez-Herlaimont experimentation.

[148] Anne Peretz. Participative management in the elaboration and implementation of the OSUA information system

[132] Marie-Pierre Baccon. Quality step and sustainable development

[116] Jean-Marc Rigoli. Evaluation in the Jardins de Cocagne

[5] Christiane Rulot and Jean-Marie Delvoye. Recommendations for the Catalyse method uses.

[133] Maribel Franco Ligenfert – Planning of the District V.

**Thematic workshops, session 6, 16:10 - 18:00**

**A64c- Multidisciplinary approaches of sustainable development– room P4**

Animation: Mihai Pascaru - Report: Csilla Filo - Blog: Jean-Louis Poirey and Valérie Drezet

[47] Virginie Gannac. “In situ Art exhibitions as a support of a sustainable development policy in the post-industrial areas and new regional territories”?

[51] Zoltan Wilhelm. Sustainable water management methods in Hungary

[52] Pierre Maurel and Yann Bertacchini. Conception, representation & mediation in participatory land planning projects : 3D physical models artefacts

[71] Ruey-Ming Tsay and Hsiu-Jen Jennifer Yeh. The Effects of Social Stratification in the Process of Urban Development: an Empirical Analysis of Taiwan’s Case

### **A65c – Collaborative methods and tools for the partnership (II) – room P5**

Animation: Jean-Philippe Antoni - Report: Rueyming Tsay – Blog: Laurent Amiotte-Suchet and Mélanie Dral

[48]: Serge Schmitz, Michel Erix, Sarai De Graef, Christine Partoune, Isabelle Dalimier, Marc Philippot, Yannick Martin, Etienne van Hecke: Territorial intelligence is also networking! Which strategies could be adopted to create a community of practices?

[53] Jing Shiang. Stakeholder Analysis in Territorial Intelligence.

[6] Stephan T.P. Kamps and Cécile Tannier. Integrating the strategies of local planning agencies in a urban simulation model

### **A66c- Tools for local development – room P6**

Animation: Pascal Bérion - Report: Natale Ammaturo - Blog: Hélène Avocat and Joachim Wyssling

[2] Christian Bourret and Eguzki Urteaga. New “pays” (little countries) as local level of the process of Territorial Intelligence in France? A comparative study of the Pays Basque (Aquitaine) and the Couserans (Midi-Pyrénées).

[61] János Csapó and Mónika Berki. Existing and future tourism potential and the geographical basis of Thematic routes in south Transdanubia (Hungary).

[50] Tullia Saccheri. Action and involvement in health governance.

[26] Adel Ben Hassine. Integration and assimilation of new technologies as innovation in local development.

[123] Jérôme Valentin and Amélie Bichet-Miñaro. Study of the security representations in Planoise ZUS : methodological propositions.

### **A6ps-The uses of territorial intelligence tools (II) – synthesis workshop – amphitheatre Jacques Petit**

Animation: Celia Sanchez - Report: Blanca Miedes –Blog: Guillaume Poulet and Marion Landeta

[102] Julia Fernandez Quintanilla. ACCEM observatories network.

[105] Isabel Gonzalez Mahe. Manual for use of the Accem’s observatories.

[72] Javier Mahia Cordero, Marisa Martinez Martinez, Raquel Palacio Torre, Isabel Hevia Artime. Permanent observatory of migration in Asturias ODINA.

[120] Braulio Carles Barriopedro, Oscar Hernando Sanz: The Accem observatories in the Guadalajara province.

[79] Encarna Garcia San Martin, Carmen Garcia San Martin, Lourdes Garcia Fuertes. GOL Leon observation group.

[107] Manuel Sánchez Montero y Mercedes Guzmán Bejarano. The development course of the permanent observatory of immigration in Sevilla.

[92] Outaile Benabid. The permanent observatory of immigration in Girone.

[76] Javier Mahia Cordero, Raquel Palacio Torre and Marisa Martínez Martínez. Observatory of migrations of Asturias ODINA (poster).

[121] Braulio Carles Barriopedro, Pilar Carlés, Oscar Hernando Sanz and David Márquez. Observatory of migrations of Guadalajara OPEGU (poster).

[118] Braulio Carles Barriopedro, Oscar Hernando Sanz, Alejandro Moreno. Observatory of migrations of Sigüenza OPASI (poster).

[80] Encarnación García San Martín, Carmen García San Martín and Lourdes García. Observatory of migrations of Leon GOL (poster).

[91] Outaile Benabid and Marta Sánchez. Observatory of migrations in Girona OPIG (poster).

[99] Manuel Sánchez and Mercedes Guzmán. Observatory of migrations of Sevilla OPIS (poster)

[18:15-19:00] Closing session

Table : Jean-Jacques Girardot, Philippe Dumas, Serge Ormaux, Cyril Masselot, Csilla Filo, Blanca Miedes, Mihai Pascaru, Amélie Bichet-Minaro.

**[20h30] Official Dinner, room Castan, Place Victor Hugo.**

### **Saturday, October 18<sup>th</sup>**

[10:00-12:00] Tasting of Jura wine (Arbois)

[12:30-14:30] Lunch in the Saline d'Arc-et-Senans

[14:30-15:30] Visit of the Saline d'Arc-et-Senans

#### **2.2.2.3.4. Synthesis**

The sixth International Conference of Territorial Intelligence took place in Besançon (France) on October, 16<sup>th</sup> and 17<sup>th</sup> 2008.

Its main topic was “Tools and methods of Territorial Intelligence”

The call for papers, published on January, 31<sup>st</sup> 2008, suggested three themes:

A. [Tools] – Territorial Intelligence Tools for and by actors of sustainable development (coordination Jean-Jacques GIRARDOT)

B. [Methods] – Scientific methods and generic tools of spatial observation and territorial information analysis (coordination Serge ORMAUX)

C. [Concept] – Evolution of the territorial intelligence concept (coordination Philippe DUMAS).

This scientific event organised by the Institute of Humanities, Social and Environmental sciences of the Université de Franche-Comté was very successful, what underlines the caENTI success and implies planning a continuation of this project.

The scientific committee reviewed and selected 148 communications over 182 proposals.

WP2 works with WP3, which manages the software ConfTool to make registrations and communications proposals reviewing. WP3 also edit a blog on the conference.

The conference took place in the Faculty of Humanities and Social Sciences of the Université de Franche-Comté. PhD students in geography, students in master of digital edition and of applied languages participated to the blog feeding with real time articles on the conferences and workshops, videos and pictures.

The portal of territorial intelligence managed registrations and communications proposals reviewing. The scientific committee reviewed and selected 148 communications over 182 proposals.

The scientific event mobilised 248 participants of 22 nationalities. Among the 218 European participants there were 124 French people. 29 researchers came from North and South America, Asia and Africa. Organised within the caENTI (Coordination Action of the European Network of Territorial Intelligence) framework, supported from March 2006 to February 2009 by the Sixth Framework Programme of Research and Technological Development of the European Union, it gathered 123 researchers and actors members of the caENTI and 115 other researchers and actors.

The portal of territorial intelligence edited a blog on the conference, with the help of the University of Alba Iulia for online videos, which published in real times the contents and the reports of workshops. It received more than 600 visits during the event end and has received 2500 visits up to now.

After the event, we also received many congratulation emails that praised the communications quality and the reception friendliness. They expressed their authors will to participate to the continuation of the territorial intelligence network, in particular by offering to receive meetings and preparation seminars for the future project.

These offers are progressively becoming reality and the European Network of Territorial Intelligence is extending at the international level. Besides, the next conference of territorial intelligence will take place in Salerno on November, 4<sup>th</sup> to 6<sup>th</sup> 2009.

We publish in the proceedings 83 papers in English (see deliverable 16).

### **2.2.3. Workpackage 2 “Conference” deviations from the project workprogramme**

They were no deviation from the project workprogramme. As planned, three conferences were held with papers and audience in augmentation.

### **2.2.4. List of drafted documents and deliverables of workpackage 2 “Conference”**

All papers of the conferences can be found in the bibliography in annex. They can be consulted and downloaded on the portal, with eventually French and Spanish translations and presentation. We published 44 papers for Alba Iulia 2006, 52 for Huelva 2008 and 83 for Besançon (more 19 on line).

<b>Del. n°</b>	<b>Deliverable name</b>	<b>WP n°</b>	<b>Date due</b>	<b>Delivery date</b>	<b>Estim. P/M</b>	<b>Used P/M</b>	<b>Lead contractor</b>
22	Advertisement and call for papers of the Annual International Conference ALBA IULIA 2006	2	1	1	3	3	UAB
12	Acts of the Annual International Conference of Territorial Intelligence ALBA IULIA 2006	2	12	16	5	10,9	UAB
13	Advertisement and call for papers of the Annual International Conference HUELVA 2007	2	11	11	3	3	UHU
14	Acts of the Annual International Conference of Territorial Intelligence HUELVA 2007	2	1	24	4	6,4	UAB
15	Advertisement and call for papers of the Annual International Conference BESANÇON 2008	2	12	23	3	3,2	UAB
16	Acts of the Annual International Conference of Territorial Intelligence BESANÇON 2008	2	36	36	4	6,5	UFC
					22	33	

### **2.2.5. The prospects of workpackage 2 “Conference”**

The prospects of work package 2 after caENTI were:

- The drafting of an external scientific committee of the European Network of Territorial Intelligence.
- The organisation of the next international conference of territorial intelligence in SALERNO (Italy) “Territorial intelligence and culture of development” on November 2009.

## ***2.3. Workpackage 3 [PORTAL, UFC] The Extranet and Internet portal. Work package leader: Cyril MASSELOT, Université de Franche-Comté***

### **2.3.1. Workpackage 3 PORTAL objectives and starting point of work**

#### **2.3.1.1. Objective**

The WP3 main **objective** is to contribute to the visibility and dissemination of all the caENTI activities and results. In accordance with the Steering Committee and under the Editorial Committee authority, the WP3 manages the Territorial Intelligence web portal ([www.territorial-intelligence.eu](http://www.territorial-intelligence.eu)) and is in charge of the integration of new Internet services.

The WP3 also provides the caENTI with a protected Extranet (Intra-consortium website) and a cooperative workspace (CooSpace).

Finally, the WP3 is in charge of all the consortium external communication and of the edition.

#### **2.3.1.2. Work starting point**

Our **work starting point** was the first version of the territorial intelligence portal ([www.territorial-intelligence.eu](http://www.territorial-intelligence.eu)) that was born on March 2006. The second phase was dedicated to the portal improvement and to the setting-up of new services. Finally, during the third phase, we started an important and deep work of general restructuring of the territorial intelligence portal.

Regarding the extranet, the Intra-consortium website was worked out and parametered from March 1<sup>st</sup> to June 30<sup>th</sup> 2006. The cooperative workspace, CooSpace, has been in progress since March 1<sup>st</sup>, 2006, and evaluated, to be definitively operational, by the end of June 2006.

#### **2.3.1.3. Organization of the coordination activities**

The University of Franche-Comté (UFC, France) is in charge of the general coordination of the portal, the development of Internet services and the communication. Cyril MASSELOT (UFC) is the leader of the Workpackage 3.

The extranet development task was jointly implemented by the UFC and PTE. The animation of the extranet is made by the UFC with two extranet managers, the leader of the work package 3 and the contents leader.

The definition of the contents digital publishing strategy is coordinated by the UFC and the UNISA within the Editorial Committee, which is also in charge of the portal and tools evaluation.

The researchers involved in the coordination activities, and the tasks done are:

#### Editorial Committee (WP3e)

- Cyril MASSELOT, UFC, WP3Leader
- Jean-Jacques GIRARDOT, UFC, caENTI Scientific coordinator, WP6 Leader
- Amélie BICHET-MINARO, UFC, caENTI Manager and Innovation and Dissemination Manager
- Eddy PETIT, UFC, Contents Leader and Intranet management
- Anne PIPONIER, UNISA, Evaluation coordination
- Mihai PASCARU-PAG, UAB, WP2 Leader
- Csila FILÓ, PTE, WP4 Leader
- Blanca MIEDES UGARTE, UHU, WP5 Leader
- Phillipe DUMAS, News editor of the Territorial Intelligence Journal

#### Communication (wp3k):

- Cyril MASSELOT, UFC, Communication Leader
- Isabelle MOURET, UFC
- Eddy PETIT, UFC
- Sophie BUI, UFC

#### Contents (wp3c):

- Eddy PETIT, UFC, Contents Leader
- Ioan ILEANA, UAB, Acts publishing
- Anne PERETZ, ADAPEI, Events cover
- Maria TEJADA, ACCEM, Events cover
- Amélie MOUTON, OPTIMA, Events cover
- Rémi THOMAS, Events cover, video
- Cristian MATEI, UAB, Events cover, video
- Iulian JOLDES, UAB, Events cover, video

#### Internet services (wp3i):

- Antonio MORENO MORENO, UHU, Programming leader
- Eddy PETIT, UFC, Intra-consortium management
- Peter ACS, PTE, Coospace management
- Yannick BERTRAND, ULG, Design

- Mattieu LATROY, UFC

**2.3.2. Workpackage 3 PORTAL progress towards objectives** (coordinated research activities, task worked, participants involved, and results, Eddy Petit, 5 pages *maximum*)

### **2.3.2.1. Coordination meetings**

The editorial committee often works in a remote way (with cooperative tools like CooSpace and the Intra-consortium). The editorial committee meetings took place on the occasion of meetings organized within the caENTI for other WPs or of meetings organized by some caENTI participants.

List of the meetings that took place since the first period:

- WP6 in Durbuy, June, 29<sup>th</sup> and 30<sup>th</sup> 2006
- WP2 in Alba Iulia September, from 18<sup>th</sup> to 23<sup>rd</sup> 2006
- During the WP6 meeting in Madrid (Spain), from 22<sup>nd</sup> to 24<sup>th</sup> of March 2007
- During the WP4 meeting in Salerno (Italia), from 9<sup>th</sup> to 12<sup>th</sup> of May 2007
- ACCEM in Santa Susana (Spain), from 17<sup>th</sup> to 19<sup>th</sup> of May 2007, first organisation of events coverage in the conference of HUELVA 2007
- During the conference "Tic et Territoire" in LYON (France), 13<sup>th</sup> of June 2007, launch of the thought about the Intelligence Territorial review.
- HUELVA 2007 International Conference (Spain), October 2007: Event coverage organization.
- WP2-WP3 meeting in BESANÇON (France), 12<sup>th</sup>, December 2007: Organization of the publication of acts (configuration of tools) and first organization of the third international conference Besançon 2008.
- WP3 meeting in BESANÇON, from 31<sup>st</sup> January 2008 to 1<sup>st</sup> February 2008: Planning of the questionnaire to evaluate the internal and external communication of the caENTI.
- WP3 meeting in HUELVA, 21<sup>st</sup> February 2008: Planning of work for Internet services (Single Sign-On project...)
- 07/03/2008, in Huelva about the portal services
- 28/03/2008, in Besançon about the Journal of Territorial Intelligence
- 30/05/2008, in Pecs about CooSpace improvements
- 02/07/2008, in Besançon about the web-mapping portal integration
- 07 & 08/07/2008, in Toulon about the ontology and the Journal of Territorial Intelligence
- 

### **CooSpace and other coordination activities:**

The WP3 is the main user of CooSpace, as it uses several forums and publishes many documents. The WP3 also used the WP3 mailing list to organize the event cover of the

conference BESANCON 2008. The Intra-consortium was used to upload all the definitive version of the documents, in order to make them available for the whole caENTI consortium.

### **2.3.2.2. Joint or cross activities with others WP**

By definition, the editorial dimension of the WP3 leads to develop transversal activities, for example for the official publication of deliverables, states-of-the-art and conference acts. The cross activities are frequent:

- With the WP1 for all the communication issues (for strategic reasons) and for editorial validation.
- With the WP2 for the responsibility to support the scientific and the organizational committees, regarding the advertisements and call for acts contribution and publication. The WP3 implements the management of the call for communications, the communication strategy, and it is in charge of the acts edition and of their online publication.
- With the WP6 for the preparation of the methods and tools online publication. The WP3 is preparing the final version of the portal with integrated online tools designed by the caENTI (Catalyse Toolkit, see WP6D report).
- With the WP4 and WP5 for the online publication of the states-of-the-art, results and of the video.

### **2.3.2.3. Coordinated research activities, task worked, participants involved**

**Feeding of the Territorial Intelligence portal (UFC and participants):** Regarding the editorial activity, we focused on the development of contents about formation in the Territorial Intelligence field. During this period, we published all the deliverables that were expected from the caENTI in this mid-term course. All the deliverables are accessible at this address: <http://www.territorial-intelligence.eu/caenti/deliverables/>. The portal was also fed with news from the caENTI participants concerning the actors activities, the researchers, the caENTI and the watch in the Territorial Intelligence field, and with monthly editorials too.

**Conferences blog (UFC):** The International Territorial Intelligence Conference aims at widening the visibility of the Territorial Intelligence concept, and particularly of the caENTI activities. The WP3 did its best to promote the Huelva 2007 and Besançon 2008 conferences on the web and in the press, with a dedicated blog. It will cover the conference in live, allowing accessing some of the slides speakers will use during their presentation, photos, quotes, and the event mood...

**Conferences management system:** The WP3 sets up Conftool that helps to make the events management easier and much more efficient, by integrating the submission/review-process as well as the registration of participants and invoicing.

**Catalyse Community website (UFC):** The WP3 sets up a space (<http://www.territorial-intelligence.eu/catalyse/>) dedicated to the Catalyse Toolkit (WP6). It consists in a blog and a wiki. The blog allows alerting the Catalyse Community about new version of the tools (Pragma, Anaconda...) and allows the public downloading the tools to be used. The wiki intends to organize the documentation in several languages.

**Journal of Territorial Intelligence:** The work regarding the digital publishing strategy and the scientific committee constitution is ready. The first edition will include the best six contributions of the Fifth Annual International Conference of Territorial Intelligence (Huelva 2007), and we are ready to publish it.

**Internal Evaluation Report and evolution proposals (Editorial Committee):** The WP3 published an Internal Evaluation Report on the Territorial Intelligence portal and on the tools it includes. Every six months, the Editorial Committee provides an internal evaluation report and some evolution proposals to the Steering Committee and to the Innovation and Dissemination Manager. The results were presented during the conference Besançon 2008.

**Use study and needs analysis: launching a large scale survey (UFC, UNISA):** In order to improve the portal functionalities and the use of its associated tools (collaborative platform CooSpace and Intra-Consortium website) the editorial committee (wp3e) launched a large-scale questionnaire. The main objective of this action was to study the use of the ICT tools and about the perception of the new Territorial Intelligence portal, to get a more detailed view of the needs and communication practices among the caENTI members, and then to improve the portal device and its effective use. The results were presented during Besançon 2008 (see D21).

**Communication:** Communication implies ensuring that caENTI activities and Territorial Intelligence notion are known. Firstly, it concerns the portal indexation to give them a better visibility. The WP3 focused on the creation of a partners network to exchange links and logos. It also focused on the indexation on others websites, and more specifically on the regional gateway websites (CORDIS Franche-Comté for example...). It also concerns the promotion of activities.

#### **2.3.2.4. Results**

Gathering data about the traffic on the territorial intelligence web portal shows a constant progression. In 2006, according to *Google Analytics*, the portal received **7,211** visits and 6,000 unique visitors. In 2007, it was **15,837** visits and 10,932 unique visitors. In 2008, it

was **32,843** visits and 24,916 unics visitors. Regarding the ranking in the search engine, at the end of August 2008, a research with a meta-search engine (<http://polymeta.com>) with the key words “territorial intelligence” still put the portal in the **first position** in Google, Yahoo, Live Search and Ask.

The “Tools and links” section was reorganized to present the tools for Territorial Intelligence (Catalyse Toolkit, tool to assess Action-Research Quality...) in a more efficient way.

### **2.3.3. Workpackage 3 “Portal” deviations from the project workprogram**

In comparison with the project workprogram, the WP3 did more than planned. But in comparison with the latest period prospects, we were late in delivering the newsletter and the Single Sign on project.

#### **2.3.3.1. Drafted documents**

- Draft documents about the new territorial intelligence portal (UFC)
- Project of graphical charter for the new territorial intelligence portal (UFC)
- Draft documents about the Intra-consortium roadmap (UFC)
- Annual report of CooSpace usage (PTE)
- Regarding the single sign-on (SSO) system, considerations and proposals, Antonio MORENO MORENO (UHU), April 2008.
- Analysis of the territorial intelligence study and competitive monitoring study for the optimization of the territorial intelligence portal, Amandine Rocua (UFC), May 2008.
- EVALUATION OF THE COMMUNICATION, INVENTORY OF THE ISES AND NEEDS IN INTERNAL AND EXTERNAL COMMUNICATION. Resultats of the inquiry by means of questionnaire drafted by WP3 from March to June 2008 among the actors of caENTI, Anne PIPONNIER, 30 juin 2008.

#### **2.3.3.2. List of deliverables**

<b>Del. n°</b>	<b>Deliverable name</b>	<b>WP n°</b>	<b>Date due</b>	<b>Delivery date</b>	<b>Estim. P/M</b>	<b>Used P/M</b>	<b>Lead contractor</b>
17	Intra-consortium web site.	3	4	4	2	9,7	UFC
18	Cooperative workspace	3	4	4	4,5	10,5	PTE
19	First periodic portal editorial report.	3	12	12	1,5	6	UNISA
20	Second periodic portal editorial report	3	24	24	1,5	2,25	UNISA
21	Final portal editorial report	3	36	36	1,5	3	UFC

22	Territorial Intelligence Portal	3	36	36	13	15,48	UFC
					24	46,93	

**2.3.4. Prospects of the workpackage 3 “Portal”** (services to actualize and projects of new services, Cyril Masselot : 1 page *maximum*)

During the last period, the WP3 worked on:

- The online publication of videos concerning the International Conference Besançon 2008
- The set up of the portal newsletter
- The publication and presentation of the results of the survey about communication needs, during the final conference that will take place in Besançon, from October, the 15th to the 18th 2008.

Regarding communication activity, we have to improve an effort of communication towards website in others languages to increase the visibility for example in the Spanish world. We have still a lot to do to publicize and exploit the numerous documents and products designed in the framework of the caENTI.

The main objective is to keep the community alive in order to continue to develop more editorial content and attract more scientific content. We also want to develop the network around formation in the field of Territorial Intelligence. We will promote the European Network of territorial intelligence in link with others international network like *Territorios Possibles* in South America.

***2.4. Workpackage 4 [Fundamental Methods] The spreading of fundamental methods and research design in territorial information analysis within the Humanities and Social Sciences. Workpackage leader: Csilla Filó, University of Pecs***

The WP4 aims at improving the dissemination of spatial analysis and territorial information processing methods and tools within the Humanities and Social Science and at increasing the territorial information use.

These objectives have been divided into five scientific coordination activities during the two first periods. A synthesis of these research activities was made during this third and last period.

Thus, this part presents the workpackage 4 global objectives and organization, the progress toward objectives of the WP4 and of its coordination groups, the deviation for the project workprogramme, the list of deliverables and the prospects of the WP4.

#### **2.4.1. Workpackage 4 “Methods” objectives, work starting point and organization**

##### **2.4.1.1. Objectives of the WP**

**WP4 [FUNDAMENTAL METHODS, PTE]** The spreading of fundamental methods and research design in territorial information analysis within the social sciences and humanities pursues three objectives:

1. Improve the spreading of the methods and fundamental tools of spatial analysis and the processing of territorial information within the social sciences.
2. Increase the use of territorial indicators.
3. Define the concept of territory in the multi-field context of the integrated approach and the indicators of competitiveness in this approach.

This work package animates five scientific coordination reflexions:

The WP4 has the following objectives:

1. Improve the dissemination of the methods and tools of spatial analysis and of processing of territorial information within the social sciences and humanities. They are methods and tools of wide-applicability such as geographical and spatial analysis information systems, qualitative and quantitative data analysis and info metrics of the professional tools used by the territorial actors.
2. Increase the use of territorial information. In parallel, these methods and tools help improve the use of territorial data, within the social sciences and humanities, where their dissemination remains limited and unequal depending on the disciplines. An analysis of European Commission relevant projects and of existing information in the DGs that might be relevant to the field. This would be useful to avoid work on topics, which had been previously dealt with.
3. Define the concept of territory in the multi-field context of the integrated approach. The intelligent use of territorial information and of its instruments calls for the need to deepen the analysis of the concept of territory and of the

processes of “territorialisation” (site specification). We will be particularly interested in the definition of the indicators of competitiveness of territory in a global approach.

They had been conducted within five scientific coordination activities:

**WP4M [Methods, UFC]** Inventory of the fundamental methods of territorial information, leader S. ORMAUX, UFC.

**WP4I [Information, ULG]** Comparative inventory of European territorial information, leader G. DEVILLET, ULG.

**WP4P [Projects, UFC]** Evaluation of projects funding by European Commission and of information in the DGs in the field of territorial intelligence, leader J.-J. GIRARDOT, UFC

**WP4T [Territory, UNISA]** Concept of territory and process of site specification, leader P. CHAMPOLLION, UNISA.

**WP4C [Competitiveness, PTE]** Indicators of competitiveness of territories, leader C. FILO, PTE.

These coordination activities are divided in three annual tasks: make a state-of-the-art in 2006 the comparative research in each domain 2007. A synthesis was performed in 2008.

#### **2.4.1.2. Work starting point**

In the first term we organized the research work of teams. Each task leader defined the activities and created some scientific question to research actions. These questions follow:

##### **WP4M [Methods]**

- Which generic methods of wide applicability (such as the GIS) are used to study the territories and to analyse the territorial information in the SHS?
- In which disciplines are they used? Which European laboratories manage them best? How to improve their dissemination within the SSH?
- Which methods can provide modules for the design of tools?

##### **WP4I [Information]**

- What are the main sources of territorial information that are available for the researchers in Europe, at the European, national, regional and local levels?
- What are the twenty most relevant territorial indicators for the actors of the sustainable development of territories?
- What are the main difficulties of comparison of this territorial information?

##### **WP4T [Territory]**

- What are territory, territoriality, and territorialisation?
- Territory space, network space, community.
- Are there different disciplinary approaches of the territory?
- What is territorial development actually?

- Who are the territorial actors?
- What is the relevant territory for the sustainable development?

#### WP4P [Projects]

- What are the projects funded by the UE (research and action) that we can consider as Territorial Intelligence projects?
- How to select the most relevant projects?
- Which GD information is relevant for Territorial Intelligence?

#### WP4C [Competitiveness]

- Which are the factors of territories competitiveness? (amenities, accessibility, human resources, industrial network, innovation, governance, labour market, social protection, cultural heritage, environmental protection..)?
- What are the most relevant indicators?
- How to compare these indicators at the European level?
- Competitiveness governance and territorial marketing.

As a general plan, each scientific coordination group should aim at making a state-of-the-art in 2006, then at enlarging upon a European inventory of skills in 2007, with a synthesis in 2008.

Since January 2008, all the activities were coordinated in the coordination group Wp4s.

#### **2.4.1.3. Organisation of the coordination activities in the WP**

As regards the workpackage organisation, small coordination meetings were organized by the thematic coordination groups in the two first period.

During the third period, the synthesis group ended the tasks the thematic coordination groups have started and liked to deepen more:

- The work started by Wp4m in 2006 about the geographic information systems.
- The European state of art about the concept of territory that SALERNO began this state of the art will include an international bibliography and a listing of European laboratories which are working about territory.

It made two connections before the global synthesis:

- Wp4i worked with Wp4c in Wp6i to draft the specifications of the Portal of territorial intelligence information.
- Wp6m worked with Wp6t, within the framework of the European census of the teams that work on territory, it is planned to identify those that use the quantitative type methods. Made from the Internet websites, this approach completed the questionnaire surveys started in 2007, but that did not receive a satisfying answer rate.

Then, the research coordination group Wp4s “Synthesis” aimed at drafting the final scientific report of synthesis on territorial intelligence from the states of the arts the separate coordination groups have established. In this task we harmonized the reports about the territories, researches methods and information. This work was begun in 2008 run by University of Pécs. In 2007 the workgroup reorganized the WP4 and the subtasks of Method and Territory worked follow as the territorial observation and research activity and besides the groups Information and Competitiveness defined the indicators of territorial process and competitiveness. In the Synthesis the contributors gave to research actions an aspect of new methods where firstly they defined the territory and territorial process regarding EU. In this work the Territory and Methods groups created such a territorial definition where we could look at the dynamic processes as territory and in the relationships like human and environmental determinants are very important factors. This dynamic territory definition deepened the data collection and from it the indicators of competitiveness. We presented this process in the caENTI of deliverable 33.

Wp4s started the tasks of synthesis in the Coospace. We will create a form for collecting of research actions that we can compare our activities.

Folowing researchers or actors were associated to the WP4 activities.

Péter ÁCS, associate professor of ICT, PTE, territorial competitiveness, digital governance

Natale AMMATURO, professor of sociology, UNISA, territorial intelligence projects and information

Csaba Zoltan BERES, professor of geography, PTE, territorial competitiveness

Amélie BICHET MINARO, engineer UFC, territorial intelligence projects and information

Iuliana CENAR, associate professor of sociology, UAB, scientific methods and generic tools

Pierre CHAMPOLLION, associate professor of geography, OER/UNISA, leader of the coordination group concept of territory

Di CHEN, research engineer, ULG, territorial information

Sophie CHEVALIER, associate professor of sociology, UFC, concept of territory and survey on territory research

János CSAPÓ, research engineer, PTE, territorial copetitiveness University of Pécs

Manuela DE PAZ BAÑEZ, professor of economics, UHU, concept of territory and survey on territory research

Marie-Hélène DE SEDE MARCEAU, professor of geography, UFC, territorial observation

Jean-Marie DELVOYE, director OPTIMA, territorial intelligence projects and information, territorial information

Guénael DEVILLET, research director, ULG, leader of the coordination group WP4I territorial information

Julia FERNANDEZ QUINTANILLA, general director ACCEM, territorial intelligence projects and information, territorial information

Csilla FILO, associate professor of geography, PTE, leader of the coordination group territorial competitiveness, scientific methods and generic tools

Maria Isabel FRANCO LIGENFERT, VALDOCCO, territorial intelligence projects and information

Pierre FRANKHAUSER, professor of geography, UFC, scientific methods and generic tools, fractals methods

Jean-Jacques GIRARDOT, associate professor of economics, UFC, territorial intelligence projects and information, link with WP6 Tools for, with and by actors

Jean-Guy HENCKEL, general director COCAGNE, territorial intelligence projects and information

Orsolya KÉKKÖ, research engineer, PTE, territorial competitiveness University of Pécs

Ziga KOKALJ, research engineer ZRC SAZU, scientific methods and generic tools, GIS

Marion LANDRÉ, research engineer MSHE, UFC, territorial information, SIG

Alain LEGARDEZ, professor of sociology, UNISA, concept of territory and survey on territory research

Fang-Yie LEU, professor of computer sciences, THU, scientific methods and generic tools

Ovidiu LUDUSAN, professor of sociology, UAB, concept of territory and survey on territory research

Christiane MARECHAL-RULOT, director INTEGRA, territorial intelligence projects and information, territorial information, territorial information

Blanca MIEDES UGARTE, professor of economics, UHU, scientific methods and generic tools, link with work package governance principles

Olga MINGUEZ MORENO, professor of economics, UHU, territorial information, environmental indicators

Alexandre MOINE, professor of geography, UFC, scientific methods and generic tools, concept of territory, territorial observation

Monica MOLLO, research engineer, UNISA, coordination of survey on territory research

Emmanuelle MORAND, engineer, UFC, survey on territory research

Laure NUNINGER, UFC, scientific methods and generic tools, GIS

Serge ORMAUX, professor of geography, UFC, leader of the coordination group scientific methods and generic tools

Kristof OSTIR, research director of ZRC SAZU, scientific methods and generic tools, GIS

Mihai PASCARU-PAG, professor of sociology, UAB, territorial intelligence projects and information

Peter PEHANI, research engineer ZRC SAZU, scientific methods and generic tools, GIS

Tomaz PODOBNIKAR, research engineer ZRC SAZU, scientific methods and generic tools, GIS

Dolores REDONDO TORONJO, professor of economics, UHU, territorial intelligence projects and information

Serge SCHMITZ, professor of geography, ULG, territorial intelligence projects and information

Philippe SIGNORET, research engineer, UFC, scientific methods and generic tools, territorial observation

Isabelle STIEVENART, engineer observatory OPTIMA, territorial information

Filimon STREMTAN, professor of sociology, UAB, concept of territory and survey on territory research

Cécile TANNIER, research engineer, UFC, scientific methods and generic tools, fractal methods

Nicolae TODEA, professor of sociology, UAB, scientific methods and generic tools

Giovana TRUDA, associate professor of sociology, UNISA, concept of territory and survey on territory research

Tatjana VELJANOVSKI, research engineer ZRC SAZU, scientific methods and generic tools, GIS

Zoltan WILHEM, professor of geography, PTE, territorial competitiveness

Hsiu-Jen Jennifer YEH, associate professor of sociology, THU, scientific methods and generic tools

#### **2.4.1.4. Coordination activities**

##### **24th-25th of March, 2006 BESANCON (France) Kick of Meeting.**

Aim of meeting within WP4: distribution of user and password to Coospace system, where we can organize the programs, tasks and meetings within WP4.

##### **7th of June, 2006 BESANCON (France) Seminar WP4 for task leader**

(Participants: J.J. Girardot, S. Ormaux, G. Devillet, Cs. Filó, P. Champollion)

Objectives of leader meeting:

Defining the tasks actions and some questions whose answer we are waiting for. Because this scientific questions give directions of Workpackage 4 [Fundamental Methods] The spreading of fundamental methods and research design in territorial information analysis within the Humanities and Social Sciences.

##### **29-30 of June DURBUY (Belgium) Seminar WP4 Information [WP4I]**

The meeting discussed the first proposition of themes and indicators, presented by D. Chen during the previous communication. Each participant received a copy of this proposition and together decided which themes/ indicators are retained. Another sheet was distributed to the participants, that shows the presence or not and the lower spatial level of the proposed indicators that can be found for 10 European countries in their national Internet site. However, J.-J. Girardot decided to not take into account these data at this first step of work, as the missing data could be built later by us.

Themes:

- Population: retained

- Socio-economic conditions: retained
- Employment: retained
- Dwelling: retained

#### **4th-5th of July 2006 Aix en Provence (France) Seminar Wp4t Territory**

The central question of WP4T: “From « when », that is to say from which type and which level of « organization », a natural or human « space » becomes a « territory », that is to say from when the process of « site specification » is developing?”

Themes:

- Rural school organization facing demography evolutions, Territorial actors and competences sharing
- The school territorial base
- Forms of school organization, Areas of school recruiting
- Territorialisation of educational and vocational offer
- Questions of problematic, questions of methodology

#### **6th-10th of July 2006 University of Pécs (Hungary) coordination meeting of Wp4c Competitiveness**

The team of University (Pecs) presented the WP4 Competitiveness for researcher, students and actors.

Themes:

- Defining the developable territorial unit
- Factors of competitiveness
- The development tools needed to face the challenge

#### **10th-15th of October 2006 at University of Franche-Comté (France) WP4 coordination meeting**

At University of Franche – Comte we created the intermediate report of WP4 within CAENTI project. In this paper we presented the first midterm of WP4, where we organized the participants, tasks and the timetable.

#### **16th-17th of November 2006 at University of Pécs (Hungary) coordination meeting of WP4C Competitiveness**

The team of University of Pecs organized a scientific meeting about territorial competitiveness where we evaluated the European project and studies in theme of competitiveness

### **17th of November, 2006, LIEGE (Belgium) WP4P organized a coordination meeting**

To animate a telephonic meeting in order to concretely determine the orientations previously defined in ALBA IULIA.

### **11th-12th of May 2007 Salerno University (Italy) Annual coordination meeting**

The first important coordination action was the annual meeting of WP4 in Salerno May, 11th and 12th 2007. The detailed program and report of meeting was published in the document: tia070710\_wp4\_reportmeetingSalerno.doc

Every team within WP4 made the state of the art to 31st December 2006. In these studies, it appears the cooperation of coordination works. These studies suit the CAENTI conceptions. In coordination works, we searched the relations between sub-tasks method, information, project, territory and competition and within the CAENTI. Fortunately, in Salerno the leader of WP5 (Blanca MIEDES) represented the work package “Governance”. So, we could evaluate the deliverables aspect of relations and cooperation. In this meeting we tried to enhance the Coospace use. We will upload every document on Coospace about CAENTI and we will use the chat and forums. We were glad to present the WP4 within CAENTI at the University of Salerno.

Before meeting, on 8th-10th May 2007 the University of Salerno organized a conference. Title of conference was TERRITORIAL INTELLIGENCES, REGIONAL IDENTITIES AND SUSTAINABLE. Here the members of CAENTI could present the own research action within territorial intelligence. In this conference we could get a multidimensional approach to the territorial intelligence and territorial research action in additional territorial process.

- - Coospace and other coordination activities
- - Joint or cross activities with others WP
- - Coordinated research activities, task worked, participants involved
- - Results

- - Drafted documents

### **8th-9th of September 2007 Leader meeting in Besancon (France)**

The aim of Leaders Meeting was to evaluate the present situation. Therefore, we evaluated the tasks of WP4 and we decided that the WP4 Method and Territory sub-activities would integrate and the WP Information and Competitiveness also. Consequently, we had to organize our programs on the Second International Conference.

The second coordination meeting on October 24th, within HUELVA Conference.

The aim of this meeting was:

- Evaluating the 3rd period and the second mid-term report
- Transforming the groups of sub-activities
- Harmonizing the report of sub-activities
- Planning the WP4 Synthesis sub-activities
- Preparing of next coordination meeting in Pécs 2008

On the meeting we evaluated the 3rd period in the project after the second mid-term report. Because of five sub activities finished on the 31st of December 2007 we created the new processes within the WP4. We transformed the WP4 Methods and Territory groups where the both teams would cooperate. Serge ORMAUX and Pierre CHAMPOLION lead the new group Methods and Territory. The main object would be harmonizing the territorial processes and their research methods. After 31st of December 2007 this team would joint to WP6 European Observatory of School like the WP4 Information and Competitiveness, because works of these groups would finish on 31st of December. They would joint to WP6 Internet Portal. The situation of WP4 Project is very special because the tasks of this group were analysis of European Commission relevant projects and of existing information in the DGs that might be relevant to the field of territorial intelligence. In the first period we could choose 45 projects but we could not find among them projects which are adequate to our requirement.

The presentation described the objectives of WP4. After the five coordination activities were presented the time table and deliverables in 2006 and 2007. Then coordination meetings demonstrated the activities of the work packages. Finally, each group leader presented the works of second year and we discussed the significant details because it needs to be clear for our next assignment in 2008. This task would be the Synthesis sub-activity in

which we will sum up the five parallel research processes (Wp4s). The last point of meeting was the preparing of next coordination meeting in PECS 2008.

Coordination meeting in Liege on 16th of February 2008

This coordination meeting aims at:

- Reporting of working of WP4 in previous period
- Validating of deliverables of WP4 and closing of sub activities (Method, Information, Territory, Project and Competitiveness)
- - Planning of Synthesis of WP4
- - Planning of joint activities with WP6

On this meeting the team's leader of WP4 closed the period of separate sub-activities.

#### **4th-5th of April 2008 Besancon (France) the first global coordination meeting**

It defined:

1. The final plan of the two “pre” syntheses in WP4 Fundamental Methods between wp4t territory and Wp4m methods, on the one hand, and wp4i information and wp4c, competitiveness, on the other hand, following the strategy initiated in Huelva conference 2007.
2. The links with the other workpackages, particularly between wp4i+c and the wp6p in charge of the specifications of a European portal of territorial information, and between wp4t+m and the wp6s in charge of the specifications of a territorial information community system.
3. The programme of the next coordination meeting in Pecs, and seminars, and the structure of next reports and deliverables.

#### **29th-31st of May 2008. University of Pécs (Hungary) annual scientific coordination meeting**

Pécs has given an opportunity to hold the conference here again of ENTI after 2004. The main topics of the conference were the regional information, the methods of the usage of indicators and tools. Scientific lectures were over on the conference about territorial intelligence, the relationship of the labour market and regional competitiveness, the regional researches and ICT and its background, employee and searching in the human geography, human resource management in South Asia and socio-economic transformation of Dalits in Independent India.

On 30th of May the participants discussed about ready reports in the framework of WP4 meeting. Then Jean Jacques Girardot the co-ordinator of CAENTI project reported on

the results of the project until now and the additional views, and then the participants talked over organizing the conference of Besancon 2008 for the workshops. At last we discussed the row WP4, in which the members defined the tasks of a synthesis and the deadlines.

On 31th of May we organized the meeting of WP6 where the project co-ordinator defined the next tasks and deadlines in 2008.

The workshops of the conference related to the main topic. The theme of the first workshop was territorial development and tools. We could hear about: territorial awareness of ethnic minorities, role of the green civil organizations in Southern Transdanubian Region, learning and searching in the virtual space and mental mapping, community mapping.

The topic of second workshop was new territorial approaches and methods in the sustainable development and new territorial processes in regional development. In this workshop we debated the problem of globalization and new regional processes of development and participative construction of the territorial strategy.

The title of workshop 3 was the territorial information and territorial competitiveness

The themes of presentation were the micro regional social processes in sustainable development, e-government services and the 5th level of CLBPS, regional competitiveness and local development, competitiveness of Hungarian cities.

In the workshop 4 the report of fundamental methods (WP4) was presented by leaders.

Results:

There were presented on the international conference of territorial intelligence the new research activities of projects. On the coordination meeting WP4 the leaders discussed the reports and it was prepared and organized being found the current work program of 3<sup>rd</sup> international conference of ENTI. In the synthesis subtask the preparation works began on this meeting.

#### **4th-5th of September 2008 LJUBLANA (Slovenia) SAZU coordination and scientific meeting**

This meeting aims at reinforcing the integration of the coordination group Wp4i within coordination group Wp6i that drafted the specifications of the European portal of territorial indicators. Wp6i presented the prototype of web mapping and the new topics, rights and metadata were engaged.

#### **2.4.1.5. Joint or cross activities with others WP**

WP4 used WP3 portal and Coospace.

WP4 and WP6 always have joint activities to compare territorial information and territorial indicators.

WP4 and WP5 were often linked for research activities on territorial projects.

#### **2.4.2. Workpackage 4 “Methods” progress toward objectives**

Here we present progress and results of all the coordinated research activities of the WP4, with a short summary for the tasks of the two first period of caENTI.

##### **2.4.2.1. Wp4m “methods” progress– Group leader Serge ORMAUX (UFC)**

In **WP4M [Methods]** the coordination group subjected the methods and generic tools that are used by the researchers in social sciences to study territories. The main kinds of methods that are used are evoked, and there are links with the answers of the survey which was made with the members of the WP4M. The coordination group proposes to distinguish in a first time two kinds of methods: methods for analysis and methods for simulation. In methods for analysis, territories are mostly analysed by using spatial frameworks where space is divided in discreet spatial units. Social, demographic, economic or environmental data are aggregated into these units. Statistical methods are then used to analyse the territorial content defined by the variables. Two main families of statistical methods are usually distinguished: exploratory methods and inferential methods.

- The exploration of a territorial data is commonly based on factor analysis which are able to identify their main structure. Two main methods can be used: principal component analysis and multiple correspondence analysis. Another way of analysis consists in defining a typology of spatial units. The aim is to summarize the information describing the spatial units by a simple set of categories.
- The second type of analysis method belongs to the inferential methods, where the analysis is focused on a precise character that one seeks to explain from others characters. In a simplified vision, we can say that two kinds of methods are available. First is the regression, used if the character of interest is quantitative. Second is the discrimination, if it is qualitative. This approach leads to compute estimated values of the variable of interest and to extract residual values by comparing reality and model. These residues are of a primary importance because they represent the local specificities of each spatial unit.

**Methods of simulation.** For thirty years, the research in social sciences takes an interest in the elaboration of tools which allow simulating the spatial dynamics of territories.

These simulation tools have been developed thanks to the progress in computer sciences. Considering the case of spatial simulation modelling, there are two requirements:

- The model must integrate the spatial dimension.
- The spatial simulation model must give the possibility to test many scenarios according to different assumptions.

Indeed, the interest of the spatial simulation is not really in their capacity of prediction, but in their capacity of testing many combinations of factors, many types of interactions which are too complex to be analysed without any simulation tool.

Different kinds of simulation models exist. Most of researchers considers that three types of spatial models can be used to support participative approaches:

- Models that are on a mathematical nature.
- Models that belong to the field of distributed artificial intelligence.
- Model that are based on the use of fractal geometry.

All these methods seem well adapted to design tools that are usable by territorial actors. But the transformation of the generic methods into territorial management tools requires a genuine transposition process. It also requires taking into account the available data and information.

#### **2.4.2.2. WPpi “information” progress - Group leader Guénaël DEVILLET (ULG)**

In Wp4i the participants conceived the policy of sub-activity.

1. The first set concerns the main themes. The researchers need to realise their investigation by themes. So, it is our work to identify them to make their research easier. At the same time, it is important to take into account the field data collection problems.
2. The second set concerns the data that are in direct link with the guide:
  - 2.1. In the guide, which data do we need to deepen our analysis?
  - 2.2. Which indicators can we suggest for the analysis of the guide at the regional level? (which sources?) and also at the national and the European levels.
3. For the third set of questions, it is about data that do not have a link with the guide, but have a revealing role for the territory. These data can be useful for the logic of catalyse, i.e. as an extension of a descriptor, as well as contextual data in a more general way (e.g. on environment). Actually despite that the majority of the partners have a social oriented approach of sustainable development, the territory indicators must cover all the aspects.

The work made in the WP4I leads also to another set of questions. The scale and the theme of the contextual data (no manipulated) change according to the countries. For example in Belgium, very few data are available on health. This strengthens the function of

the local observatory. According to the country, its creation needs a good knowledge of external available data, so we can use what already exists as reference and then elaborate a complementary data collection. For example, mobility to the workplace is a new indicator that is often used now. Another example is the data on environment and its perception.

Following reflection was suggested for the WP4I:

What about the rights on data? Consultation vs. Utilisation (Which conditions?)

- Can we use the not free data?
- Enlarge the needs, above Optima and Integra.
- Use the help of partners to deepen the knowledge on partner countries and then look for a small group next year to go further.
- What about the metadata information (periodicity of the data...) to give a scientific value to each item of data?
- What about the manipulation of data?

The first step of WP4I is to establish which themes and indicators are needed within the social sciences and humanities, and parallel to this, we have to consider what indicators are actually available on Internet. In this context, a research and analysis over European territorial observatories, international and national statistical sources have been led. Discussions between the WP4 teams were held to choose among a first proposition of themes and indicators and to exchange different points of view. The difficulties that appeared during our researches are also underlined.

#### **2.4.2.3. Wp4p “projects” progress - Group leader Jean-Jacques GIRARDOT (UFC)**

This part relates to the activities that were made in the framework of the evaluation of projects funded by the European Commission and of the existing information of the GDs that might be relevant in the territorial intelligence field. Its objectives can be formulated under the form of two questions:

1. Among the projects that were supported by the European Commission, which of them have an object corresponding to the questionings of the territorial intelligence?

2. Which relevant information for territorial intelligence the General Directions of the European Commission have, in addition to those that are published on the official websites?

It is a specific activity, insofar as it corresponds to a suggestion of the CAENTI project evaluators.

At the end of the year 2006, a first selection of 45 projects was made by using a selection of key-words relevant for territorial intelligence: territory, community, territorial development, sustainable development, governance, participation, partnership, global approach, transparency, information and communication technologies, ICT, knowledge-based society and citizenship (see deliverable 25). This selection crossed several research modes: from repertories and data bases but also by making direct requests on Internet.

The wp4p coordination group have two objectives dor the second period:

- To deepen the first selection of projects
- To make the intersection study between the GD, European programmes and management centers.

The coordination group was reorganized by countries and languages. As the objective of this group was the selection of the projects, the coordination group will be widened to CAENTI actors.

The two prospects achieved by the wp4t coordination group have proved to be unprofitable.

Among the 45 projects funded by the European Union that we had noted as belonging to the territorial intelligence field, only 5 projects could have been contacted and were still unexplored (see deliverable 30 appendix 2)

About the intersection study, we consulted all the General Directions of the European Commission about the information they had and the projects they funded and that could be relevant in the territorial intelligence field. We wrote to the following General Directions: Management of information systems - Common research centre - Europe Aid - Economic and Financial Affairs - Firms and industries – Concurrence - Employment, Social affairs and equal opportunities – Agriculture - Energies and transports – Environment - Information society and medias – Research - Fisheries and maritime affairs - Internal market and services - Regional policies - General affairs - Education and culture - Taxation and customs affairs- Security - External relations - Trade - Development and ACP relations. We even wrote three times to some GDs when necessary. The most frequent answer we received was to consult CORDIS, as well as to get territorial information on funded projects (see deliverable 30 appendix 1)

We concluded that there is no relevant information for territorial intelligence the GDs have in addition to that that is published on the EU official websites.

All the relevant projects funded by the GDs can also be found on CORDIS. The selection of projects we made by using the official website is the most complete that can be done.

Because we are essentially concentrated in projects, the wp4 group suggested a new research orientation (about the territorial intelligence uses), which was concretised with the proposition of a new coordination group about uses within the framework of the work package 6, so-called the wp6u group, in order to constitute an analytic repertory of territorial intelligence projects.

#### **2.4.2.4. WP4t “territory” progress - Group leader Pierre CHAMPOLLION.**

The coordination research activity **Wp4t** aims at summarizing the present state of scientific thought about territory, territoriality and process of site specification. In this way it uses recent scientific works which were lead between 2004 and 2006 by REIT and CAENTI in Pecs (HU, 2004), Liège (BE, 2005), Aix-en-Provence (FR, 2005 & 2006) Alba Iulia (RO, 2006), Huelva (ES, 2007) and Besancon (FR, 2008). From different disciplinary approaches, as from main fundamental questions, a first interdisciplinary definition can today be suggested. Territories refer to “places, not obligatory adjacent, networked, fitted together into changing scales, productive of meaning and identities” (CHAMPOLLION & POIREY, 2004). So “there is no territory, included immaterial territory, without collective projection of their actors on to a communal structuring future, which generate identity and symbolic” (CHAMPOLLION & PIPONNIER, 2005).

Wp4t presently work to elaborate a European state-of-the-art that includes an international bibliography and a listing of the scientific laboratories which work about the territory issue. During the second conference of territorial intelligence of HUELVA (Spain) on October 24<sup>th</sup>-26<sup>th</sup> 2007, the Wp4t leader can not present the first composition of the international state-of-the-art about territory because the health state of the researchers who made the survey on European research about territory don not allow her finishing or giving its partial results to the Wp4t researchers.

The Wp4t also work on the appropriation of the territory concept by the local actors within the framework of sustainable development. The Wp4t team met with the CAENTI territory actors OPTIMA in SERAING (Belgium). They compared its interdisciplinary definition of territory of Wp4t with the real and actual needs of the local actors, so as an operative definition of territory can be elaborated.

For OER and OPTIMA territory is an organized social-spatial global system, which is limited in time and space. It presents the five next interdependent characteristics:

- It is built by actors and appropriate by inhabitants.
- It is based on collective project, which are looking for common future.
- It comes from patrimonial past.
- It is at the same time lawful (institutional), real or lived (territory of action and live) and dreamed (symbolic).
- It generates identity (identities) and symbolic(s).

These exchanges have produced an scientific paper for the international revue NETCOM (end May 2008). His title is: *Observatoires numériques et pratiques citoyennes : des outils d'intelligence territoriale au service du développement durable ?*

#### **2.4.2.5. Wp4c “competitiveness” progress - Group leader Csilla FILO (PTE)**

The 21st century sees changes in modern society, social structure, territorial policy, public administration and other fields, generated by the European Union, which have a significant impact on the functioning and efficiency of society. For real competences to find their appropriate places and levels, a mature society are required as well as the investigation and improvement of the maturity of territorial levels prior to implementing any measures.

In this subtask we present our concept about territorial competitiveness and this relation to territorial intelligence, that was the main task coordination research activity Wp4c [Competitiveness]. It aimed at defining the factors of competitiveness.

- Economic structure (To what extent do local economic actors contribute to the sustainable development of the region and its potential to retain population?)
- Innovation (To what extent can local authorities and economic actors co-operate in shaping the future of the region?)
- Accessibility (The level of development of a region is greatly determined its physical-infrastructurel, and ICT (info-communication technology) conditions.)
- Qualified human resources (The role of human resources has been upgraded during the expansion of cognitive society and globalization. Social factors therefore obviously correlate with development potentials in a given area, not so much in the number of active workers but in training, qualification and professional knowledge, which are indispensable conditions of competitiveness today.)
- Cultural and natural environment (how can influence the cultural and natural processes the development of regions)

Currently, there are several, well known definitions of territorial competitiveness, which interpret the approach of competitiveness on territorial units variously. Competitiveness is often viewed as a key indicator of the success or failure of policy. The concept of competitiveness, however, while relatively clear when applied to enterprises, is more difficult to define and measure when applied to regions or countries. An industrial region, for example, is not directly competing against a predominantly agricultural region or a financial centre, so the measurement of its relative competitiveness is problematic. Moreover, the term itself tends to convey the impression of a win/lose situation, in which regions can improve their position only at the expense of others, whereas, in practice, there are mutual gains to be achieved from individual regions becoming more competitive.

This concept of competitiveness aims at achieving a local specialization that enables different territories to cooperate in a context of general development.

Territorial competitiveness means:

- Taking the area's resources into account in a bid for overall coherence;
- Involving different players and institutions;
- Integrating business sectors into an innovation dynamic;
- Cooperating with other areas and linking up with regional, national and European policies as well as with the global context.

Our concept of territorial competitiveness has gained ground in academic, policy and practitioner circles. In particular, regional competitiveness has generated a large literature. These are described formerly. But the territorial competitiveness differs to regional competitiveness. This difference offers to approach. According to dynamism and spatial analyzing the territorial determination oversteps on the regional competitiveness. The base of regional competitiveness is the incoming and the product contrary with territorial competitiveness where the base is the innovate process in sustainable development.

Sum up, the territorial competitiveness diverges from regional competitiveness so that applies the methods of analysing but it considers in process the information concern this information will be jointed to challenge sustainable development.

Territorial competitiveness is an integrated and proactive approach to shaping the future of territories, regions and larger geographies – to some degree it can also be referred to as spatial planning. It goes beyond traditional regional policy as it brings together economic, social and environment opportunities and concerns as well as other factors which influence

where activities takes place, how different places function and are connected, and what conditions are offered for living and doing business.

Territorial competitiveness strategies can help exploring potentials for economic growth and jobs and at the same time support an enhanced quality of life by helping to meet the challenge of sustainable development.

Our work firstly we compared the theoretical literatures of competitiveness from classical theory to urban growth theory across on neo classical theory, Keynesian economic theory, development economics and new trade theory. Besides we investigated the modern definitions about it for examples: OECD, DGIII of EC, European Competitiveness Report, Second Cohesion Report of the EU etc. In this papers the concept of competitiveness, as seen in the EU, could be summarised as “high and rising standards of living and high rates of employment on sustainable basis”.

The traditional measure of competitiveness/standards of living is generally calculated by the GDP per head, despite the fact that some other indicators should be defined in order to integrate the social, environmental, health and well-being dimensions. GDP per head can be broken into two main components: employment rate (proportion of working age population in work) and productivity (GDP per person employed).

Consequently, the EU places emphasis on structural factors underlying competitiveness which determine the long-term growth, in particular research and innovation, information technology and human capital.

This commitment was confirmed by the ultimate objective of the Lisbon European Council, which has stated that “the EU becomes the most competitive and dynamic knowledge-based economy in the world over the decade, capable of sustainable economic growth with more and better jobs and greater social cohesion”. There is a clear relationship between innovation, human capital and information technology when it comes to competitiveness. Indeed, the capacity to innovate is perceived as the best answer to global competition, the needs to adapt to technological changes and to constantly produce new products, which are elements characterizing the post-Fordist production system. The capacity to constantly innovate and to absorb innovations is directly linked to the level of education of the population. Information technology is a key element when it comes to knowledge development and policy. In summary, in the EU, developing regional competitiveness depends on modernizing and diversifying the productive structure (by developing knowledge-

based economic activities and innovation) once a sufficient endowment of physical infrastructure and human capital is attained. This has to be achieved respecting a horizontal condition, which consists in achieving a sustainable development in environmental terms.

Regarding of European studies about territorial competitiveness we determined the main factors: 1. Clusters; 2. Human capital; 3. Enterprise environment and networks; 4. Innovation/Regional innovation systems; 5. Governance and institutional capacity; 6. Sectoral structure and type of enterprises; 7. Infrastructure (broad understanding); 8. Typology of regions and level of integration of firms; 9. Internationalisation and nature of foreign direct investment (FDI); 10. Geographical location; 11. Attractiveness for investments.

However, there is a danger that competitiveness at a territorial level becomes a conceptual chimera. The essential problem is that territorially based actors and agencies seek to position and maintain the utility of their regions and sub-regions by reference to a set of measures and indicators that are conceptually suspect and often empirically weak. The degree to which territory compete depends on a manifold set of factors. But, our research experiences give a heading toward main factor. Moreover, a region's most important resource is its human capital. In order for European Union to move forward and be strong, we must invest in EU, ensuring that no member of society is left behind in the knowledge-based economy. Although most people know how to read, the real question is whether their reading and writing skills are such that they are able to meet the challenges of living and working in society and the knowledge-based economy. Globalization and new technologies have brought about profound changes in the workplace. These factors have set more demands, as well as changing and rising expectations on employees.

In the new economy, where jobs are run by technology and information, lifelong learning is the key to ensuring that EU continues to be productive, globally competitive and economically secure. The success of territories in the knowledge-based economy depends on the ability of its workforce to respond to new challenges and pursue lifelong learning opportunities.

Literacy has become an important issue for business and labour. Workplace literacy refers to the essential skills that people need at work, such as reading, writing and numeracy. It also includes critical thinking and problem solving. EU with strong literacy skills have better paying jobs and are less likely to become unemployed than those with lower literacy

levels. The opportunity to use literacy skills on the job can actually help people maintain and enhance these skills, long after they have completed their formal education.

In the knowledge-based economy, territories of EU's success depend on the ability of its workforce to respond to new challenges. This is challenge that no single government can achieve alone. To achieve this goal, we must continue to work together with other governments, literacy partners, and business and labour groups, to strengthen literacy and other essential skills that are the foundation of lifelong learning.

In several project we have already manifested the influencing of human resources to development. The human potential affects to all factors of territorial and regional competitiveness. Namely, what territory would be development able which has qualified labour force. The status of human resource determines the establishment of enterprise because it needs the creative work-force. If on the labour market are located qualified employees to challenge of cognitive society the level of innovation is rise-able. But the local government has responsible control of territory or region so that the centre of decision making has necessity qualified human resources. As well, the integration of firms would be realisation on the modern territories where it can find the usable work-force. Coming of FDI also depends the human potential because this influences the attractiveness of territory.

#### **2.4.2.6. Wp4s “synthesis” progress - Group leader Csilla FILO (PTE)**

As main **Results**, we should indicate the two planned pre-synthesis were drafted during the first mid-term period to prepare final synthesis:

- The pre-synthesis regarding territory concept and territory analysis methods.
- The pre-synthesis regarding territorial information and territory competitiveness indicators

Then Wp4s drafted a global synthesis

##### **2.4.2.6.1. Comparing the territory concept and its analysis methods.**

The synthesis on the territory concept and on the territory analysis methods were fed by the follow-up of the census implemented by Emmanuelle MORANT, and then Monica MOLLO, on the research activities about territory in Europe, as well as by the follow-up of the reflexion about map and geographic information systems.

#### **The survey on research about territory in Europe**

This work aims at identifying all the research groups in Europe that study the territory concept and produce scientific documents on this subject. The objective of this identification work is to understand how these studies contribute to the development of the territory concept and to draw a European map of research in this field. This work main purpose consists in identifying and planning possible scenarios of territory analysis and development

#### Objectives

The main purpose of this work is to make an empirical study on the “state of the art” of the territory concept, through a census about all the research / studies that are made in Europe.

The identification of the “state of the art” of the territory concept has two objectives:

- 1 The creation of a database on territory that includes all the information on the European projects available for the persons or institutions who/that intend to study "*territory*" and who/that need information.
- 2 This research also enables us to observe the evolution of the territory concept. It also helps us planning future studies on territory.

Moreover, this research contributes to the WP4 synthesis that aims to analyse the state of the methods and tools in the territory study. This last point is one of the reasons that led us to explore all the European research groups which research subject is the territory concept. Our attention focuses on the territory definition these projects produce, the methodology these groups have used in their studies and also on all the available information linked to their projects. Another important objective of this work is the development of a territory definition that could be a sort of link and synthesis between all the research and projects that have paid attention to this concept. Therefore, these research directly impact on the territorial intelligence paradigm.

#### Methods and phases

This research started by the identification of all the European laboratories that study the territory concept. The laboratories identification depended on precise criteria: a) giving priority to the European countries, b) identifying the various kinds of research funding, c) indicating, the collaborations when possible, d) selecting projects with a theoretical approach: economic, sociological, educational science, geographical, information and communication sciences. The gathered data result from the joint work made by Emmanuelle MORANT and Dr Monica MOLLO.

#### The database

The creation of a database is a means to identify the similarities and the differences within the various studies on the territory concept that were identified.

These similarities and differences are analysed by comparing those studies, initially through the theoretical approaches and then through the concerned European countries. This data gathering is an attempt to gather the various studies on territory, and also to create a basis that can be used to plan and implement future studies.

This data gathering is an opportunity to get information on the studies development on territory for people interested in designing and leading research and studies on territory whatever his/her nationality is. The information gathered in this database especially focus on nation, major research centres, methodology and tools, territory concept produced by these studies and collaborations between laboratories. During the first phase of this work, we carried out a search on Internet about the projects linked to territory. We contacted the institutions firstly by using Internet and then directly by mail or phone.

#### Data contents

The data contents are divided into two parts:

- The frequency tables for each variable
- The cross-table with the European countries and the variables

#### The bibliography

At this stage, we explored the European and interdisciplinary bibliography produced on the territory concept. This bibliographical gathering had two purposes: 1) analysing the way the territory concept is studied; 2) in different European countries and according to different theoretical approaches, identifying the concept development, through the analysis of the most important documents.

#### First results

The data analysis shows the territory concept is mainly designed at the universities and research centres level and the used methodology usually belongs to the exploratory kind or to the GIS one. The theoretical approaches used to solve problems linked to territory are usually economic, sociological and geographical ones. The research laboratories focus on the territory dynamics by globally analysing this concept through the social actors' policies, the economic aspects and the geographic territory. For each of these aspects, different approaches and methods are used. It seems the territory can be studied in terms of local development (that can be either social or economic) on the basis of a data analysis. Among the data, it appears the territory concept is sometimes studied from the spatial point of view (not only considered as a

geographic space but also as a social one). It can be developed whilst respecting cultural identities and actors needs. The studied data also show that work on territory is often led in cooperation. These collaborations start among the main national research centres of a same country and then develop at the European scale.

### **Map and GIS, Tools of analysis and territory management**

The interest of tools like GIS overcomes the mere cartography function. Nevertheless, they all have an essential function of spatial representation. Consequently, we chose to present here the basis of map as an analysis method of territories, before making a synthesis about the GIS specificity during the caENTI last period.

« A geographic map is a representation of a geographic space. It emphasizes this space tract, its localization in relation with the nearby spaces, as well as the localization of the elements it includes »<sup>1</sup>. There are plenty of ways to produce a map. The used tools can be basic: on the ground with a stick, on a room floor with chalk, with a pen on a mere sheet of paper; they can be very sophisticated and combine several methods of data acquisition (aerial pictures or satellites images, ground research), of data compilation, of results processing and validation.

Data processing and digital technology allow reducing much the time necessary to produce a map, but important manual phases are still necessary.

As regards what is usually called automatic cartography, it is usually limited to the execution of maps with proportional symbols or coloured-area maps, which process was designed by Charles DUPIN at the beginning of the XIXth century, that is to say the connection between geometric shapes and digital values.

The map content construction also appeals to various expert methods (example: IGN maps) or to participative methods (example: identification of the poorest families that live in a commune, SIMANOWITZ, 2000). In this case, the map is a communication support, a representation mode, a means to gather and share information.

The legend<sup>2</sup> cannot be dissociated from the map. Indeed, even if many figures have a similar or close representation in various map providers, a geographic map remains a

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<sup>1</sup> Source : Wikipedia

<sup>2</sup> For other less important reasons, the geographical map loses much interest if it does not have enough representation or scale preciseness allowing measuring the size of a real item, on the basis of a representation.

representation for which the used graphic conventions can be adapted to the targeted lectors. Some conventions often guide the choices and, for example, it would probably be a bad idea to symbolize warm weather with blue and cold one with red.

Anyway, a map is an image and consequently it should respect the generic rules of graphic semiology (see Jacques BERTIN's works). They are rules, and not conventions. They define the possibilities given by various visual variables. The latter belong to two main categories, those that express an order (value and size) and those that express a difference (colour, shape, orientation, speck). Besides, according to the information discretisation mode we choose, the map aspect will be different. As a consequence, the obtained result is the representation of a message the map author expresses through his/her methodological choices.

According to D. RETAILLE and O. LOUISET, « cartography is not limited to [...] figurative representation but concerns the whole languages metaphorical representation, from the natural ones to the scientific languages » and « the motivations and localization choices » are more often located in « spontaneous geography » than in the « scientists' one ». It is a comment we should keep in mind within the framework of this programme devoted to territorial intelligence.

#### **2.4.2.6.2. Relations between territorial information and territorial competitiveness.**

Within the WP4, which is devoted to the spreading of fundamental methods and research design in territorial information analysis, the second synthesis aimed to identify and analyze territories (situation, problems and solutions) *via* territorial information available in Europe.

At the European scale, getting territorial information is made more complicated by the important number of data suppliers. Each country has its national institute and several national administrative departments, regional or paragovernmental organizations, what increases the difficulty to spread information within the 27-country European Union. This variety of data suppliers increases the complexity of the understanding of territories and of their dynamics. The statistics gathering is also less efficient, and consequently more expensive, for users because of the numerous contact people and procedures.

In this context, competitiveness is an important part of the territories developments strategies. This proactive approach is partly based on the analysis of spatio-temporal indicators.

## **Information and Competitiveness**

### Information (WP4i)

The first research undertaken in 2006 and 2007 concerning the European contextual indicators aimed at making an inventory of them and at characterizing their accessibility. The data were analyzed at various space levels: from local entities (LAU2) to upper administrative ones (NUTS 1,2,3).

The problems were studied in the prospect of the CATALYSE method complementarities. This method allows comparing the people's needs and the services offer, whilst taking into account the socio-economic environment (caENTI, Deliverable 56). To achieve this objective, the method used three kinds of data: the data concerning the people's needs we got *via* a questionnaire, the services offer we got *via* lists and lastly the socio-economic and contextual data that describe the environment.

After having selected 15 indicators representing 20 questions of the guide, we made research on the data characteristics. They emphasized it is necessary to be careful whilst processing and representing the data. Indeed, the processing protocols are built in different ways according to the countries. The European Office for Statistics is the only organization that harmonizes its statistics for all the data.

Our research also highlighted the lack of data and their availability discontinuity among the European countries (due to their adhesion year, the data transmission or the local availability), and even within a same country. Moreover, the available indicators are not necessarily useful or sufficient to represent the territories complexity and the people's needs in the sustainable development context.

### Environmental indicators

The WP4i research paid great attention to the environmental indicators. This approach allowed enriching knowledge on territories, in particular on the people's living context.

Identifying the indicators necessary to characterize the environment state is particularly complex. On the one hand, there are few environmental indicators and on the other hand, within the EU27 the data availability is very varied (from a country to another one and also within a country according to the space levels).

Five indicators were chosen in EUROSTAT to study the national level: the municipal waste generated, the electricity consumption by households, the greenhouse gas emissions, the modal split of passenger transport and the built up areas

### Competitiveness (WP4c)

Territorial competitiveness is an integrated and proactive approach that allows shaping the future of territories, regions and larger geographies. As a consequence, to some degree it can also be referred to as “spatial planning”. Territorial competitiveness strategies can explore the potentials that can favour economic growth and employment. It can also support an enhanced quality of life, by helping to meet the sustainable development challenge. Observation of territorial competitiveness helps revealing vulnerability. The essential problem is that territorially based actors and agencies want to enhance and maintain their regions and sub-regions utility, by making reference to a set of measures and indicators conceptually debatable and often empirically weak. The competition degree of territories depends on a manifold factor set. Within the caENTI project framework, we gathered relevant indicators, which indicate the social changing in territories. The information must necessarily be available for spatial entities at a lower level than countries.

It statistically corresponds to the European levels from NUTS 2 to LAU 1. Our research shown that the data availability is variable, depending on the considered country and on the required year. This irrefutable fact makes complex the comparative analyzes and makes null and void any certainty about the data availability. Moreover, if there are the major indicators on EUROSTAT, others are missing or need to be calculated. The wp4i selected the indicators and themes that can be used within the HSS and by the caENTI actors. Seven themes were suggested: Contextual data, Population, Socio-economic conditions, Employment, Housing, Health and Education.

### **Relation between wp4i and wp4c**

The cross-research between wp4i (indicators) and wp4c (competitiveness) highlighted the lack of indicators useful for local actors and the difficulties to gather data in a transnational context. The European institutions of statistics freely provide statistics, but only concerning regional data and current indicators.

The indicators are firstly based on economic factors. This over-representation of economic sight can be explained by the gathering facility (there are institutions in all the European countries) and by the methods standardisation.

It allows only getting a partial vision of territories, local conditions, resources and people’s needs. This fact puts forward the need to get new indicators, both general and multi-scalar, to be used by European local actors.

In addition, the cross-activities illustrate the overlapping between competitiveness within territorial development and the cooperation obligation between indicators for evaluation and strategies.

The figures gathering emphasizes the limits of our applied work and demonstrates we have an important work to do concerning the data availability and their diversity. To achieve this work, we need to be supported by public authorities.

We should keep working on these issues by making a specific research on the data use within an indicators portal. This task will be divided into two final presentations: on the one hand, a web-mapping tool that allows mapping indicators and, on the other hand, an indicators portal that can directly be used by local actors (CATALYSE).

To achieve this goal, we must gather contextual data and format them. Whilst doing this important work, we will write a methodological note.

This working group final conclusion will specify the territorial information place and definition within the context of its use by local actors.

#### **2.4.2.6.3. Global synthesys**

In the third period of WP4 we harmonized the sub-tasks. Each subtask leader presented the report of works and research activities, then we created the deliverable 33 of caENTI: *Final scientific report of synthesis on territorial intelligence*.

This report showed the activities about territorial processing, territorial observations, and data collections and how can become the territorial information to indicators.

In this work we made to compare research actions in the territorial analysing studies in level of EU. It has been made, in a collective way, from the 1st of March 2006 to 28th February 2009, by some different university disciplines researchers belong to Observatoire de l'école rurale (OER), territorial actors of OPTIM@ Asbl (who have been involved in WP4T since the meeting happened in Salerno University, May 2007). In a scientific framework, WP4T has had, in CAENTI project, as final objective to compare territory concept with its actors, for preparing the best action to improve the area. From this point of view, it has elaborated an interdisciplinary sharing approach to analyse territory concept, using territorial intelligence tools.

This last concept, we are making, is considered here as «the set of pluridisciplinary knowledge needed to know and act upon territories» (GIRARDOT, 2004), and as

phenomenon resulting from the appropriation of the resources of a territory (BERTACCHINI, 2004). It means, more precisely, a community cooperation process which establishes a loaded intelligence using the TIC (GIRARDOT, 2008), because of its final aim, that is to make easier territorial actors involvement in sustainable development logics (BRUNDTLAND, 1987) of territories.

This wp4t concept of territory final report is organized in three points, as we can see below:

Interdisciplinary approach on territory concept (starting from internal changes between different disciplines researchers into Territoire de la CAENTI) (March 2006-May 2007) working group.

1. Compare different approaches concerning territorial problems both of research and social practises regarding CAENTI actors to achieve a concept sharing definition (considering territorial intelligence for making actions regarding sustainable development) (May 2007-March 2008). One example is the development of a sharing territorial diagnosis between researchers and actors on Chapelle-Lez-Herlaimont Territory in Wallonie Belge (actually still in the pipeline) from March 2008-May 2009.

This working group has reached its territory concept starting from the approach developed by the Observatoire de l'Ecole Rurale (OER) considering scientific studies on rural territories and the analysis of their daily migrations, home-work, (spatial segmentation INSEE-INRA of 1996-1998) mountain areas from 600 to 800 metres high, considering some of their mountains. (French Montagne law of 1985). Territories studied by the OER don't refer only to institutional territories, that is prescribed, but mainly to action territories and those which are linked symbolically to representations, according to Bernard LAHIRE sociological typology. These territories affect school, organization, pedagogy, didactic, school results orientation. All together shared their specific knowledge and approaches on territory. To realise this project, firstly they studied other disciplines researchers work. So they crossed their approaches with geographers, sociologists and SIC researchers ones internally to the OER. WP4T has been surely stimulating by both OER researchers and UNISA group ideas and also by researchers ideas from other European Countries, belonging to CAENTI project. During Ecole et Contextes Territoriaux et Socioculturels (ECTS) seminar, of UMR Apprentissages, Didactiques, Evaluation, Formation (ADEF), directed by Alain LEGARDEZ, we made some exchanges and scientific discussions on this question. Pierre CHAMPOLLION

conducted many sections of this seminar, concerning territory question.

UNISA group elaborated its reflections and reports in two international conferences directed by Natale AMMATURO and with Giovanna TRUDA as collaborator:

- Intelligenze territoriali, identità regionali e sviluppo sostenibile, May 2007
- Comparazione tra sistemi educativi europei , May 2008

2. Elaboration of an update international state of art on territory concept (with an update European bibliography and one up-to-date European list of research laboratories on this subject (March 2007-August 2008).

Different researchers, belonging to different subjects (geography, sociology and education science) and from different Countries (France and Belgium) as well as different territorial actors have arranged for a better prospective regards territory construction, pay attention to MOINE and DAUMAS scientific reflections, so territory has been analysed in its temporary dimension, and looking at the future, thought as common resource. Afterward this two partners joined both in Liège (October 2007) and in Lyon (January 2008) local researchers (SEGEFA geographers and local sociologies in Liège, education territorial actors in Lyon). Structured by Pierre CHAMPOLLION and Alain LEGARDEZ, approved by territorial actors, this sharing approach presents a complex system with many dimensions. This collective reflection developed in WP4T framework by OPTIM@ and OER social actors and the researchers of different academic disciplines of OER, based on a shared vision of the territory and an initial remark of OPTIM@, led progressively the two partners to plan a common action process, and to the territorial social development of the intelligence territorial. This result would not be actually possible without the preliminary common work on the territory. The territorial diagnostic is caring out between March 2008 and June 2009. It is focus on the Municipality of Chapelle-lez-Herlaimont, small village in the south of Wallonie.

3. Compare different approaches concerning territorial problems both of research and social practises regarding CAENTI actors to achieve a concept sharing definition (considering territorial intelligence for making actions regarding sustainable development) (May 2007-March 2008).

To elaborate territory concept state of art in WP4T, starting from May 2008 Monica MOLLO, (graduate student) has been added to Italian group, to finish our work with Emmanuelle MORANT of UFC (graduate student) as collaborator. The difficulties we found as regards the picking information up on laboratories and departments concerning territories

in Europe, created the impossibility to make a WP4T intermediate report in 2007 at the prefixed date.

This research located upstream of WP4T work is in charge of the design and dissemination of territorial methods and tools accessible to the territorial actors. This report aimed at presenting an analysis on the data collected in recent months on the "concept of territorial and territorial intelligence." This research work could be summed up in four phases of work that had the same thread analyze how the concept of territory has been studied over the years, the first to the latest research, the main theoretical perspectives and methodologies used and in particular to now, the concept of territory that those searches have produced.

Finally in this sub-task, the analysis work could be summarized in five phases, which are aimed to analyze: 1) how the concept of territory has been studied over the years, from the first to research 2) the main theoretical perspectives have studied the territory 2) the methodology used in these studies; 3) the concept of territory that those searches have produced 4) the bibliography produced.

In addition within WP4 we created our conception of territory. In which we consider the territory is a system, it endorses the set of properties attached to complex systems [Moine, 2006], referring to structure and dynamics, putting forward the question of time irreversibility and its necessary to be taken into account. This system is composed of two absolutely in dissociable subsystems, which on the one hand are the actors, joined together by their mutual plays leading to the use, the installation and the management of a second subsystem i.e. the geographical space, composed of places and objects, which interact according to their localization and especially to amenities means and constraints offered to actors by them.

The WP4M Method gave a direction about the territorial spatial. An observation is defined as observing action, to consider with a followed attention, the nature, the man, the company in order to know1 it better. This definition takes all its direction, if we refer to the specific territories question, bearing in mind the studied system complexity. The observation integrates the time and irreversibility concept, it thus acts to observe in the phenomena duration characterized by their evolutionarily [Casanova, 2008]. However, these phenomena must be described with precision in manner to give an account of their evolution with exactitude and without ambiguity. When speaking about complex systems, whose behaviour is particularly unforeseeable, the case of the socio-space systems, the observation must rest on reliable data describing these systems in a consensual way. The observation consists to throw

a glance related in a durable way to a given system, described by a set of raw data, which can be combined in order to produce indicators divided by the community. The last ones are synthetic information, fruit of choice and interpretations. Moreover, this carries ahead the indicators question, allowing beginning from multiple and varied data, to represent the use consequences, the geographical space adjustment and the management by the men. The indicators concern several different logics, describing either the state of the system (diagnosis), or the impact on installation policies (evaluation), or possible system evolutions (futurology). In addition, according to their organization with the centre of observation tools, they will make it possible either the approach of themes sets (population, housing, employment, etc), or of issues, those being located at the interface between various themes sets (precariousness for example). Lastly, the observation implies a double information division, upstream the observatory supply, in order to exploit it downstream in a rational way. The data and indicators will influence the perception on the observed systems, and by the fact they will condition our glance and our selective attention. Here, an important feedback loop, binds the perception and the observation. Thus, this replaces the observation tools in the middle of actors systems in tension, within a given territory, i.e. in the middle of governance.

In a context of assimilation of the observation to the coproduction of data on the territory, it is essential to reconsider the concept of indicator, this last being in the centre of the step observation.

Thus, the indicator concept would underlie the objectivity. This brings back for us to the descriptive dimension observation, which objectives are to restore as most objective as possible the reality. An indicator is shown as an indicating variable, significant one state even an evolution (rate of variation for example) on a level of given perception and which interpretation is generally done referring to standards or comparisons. It lies within the space scope and temporal scales defined, adapted to the objectives whom it must answer. Thus, an indicator generally refers to zonings and observation frequencies, which can be different according to observers. It is essential to think about the relevance of the indicators according to the scales of concerned analysis. This last remark brings us to the questions of type: “who observes, what and on which time and space scale levels?”, given that that the indicators produced on the agglomeration level can only be complementary to those produced by an area. On the states synthetisation basis, however indicators can answer various objectives, diagnosis with the evaluation and the futurology.

The indicator takes all its direction within the observatories framework which, by definition, allows to interact and to integrate multiple sources data [of Sède et al., 2008]. Its relevance, its synthesis qualities as well as the potential of evaluation which they conceal are a function of the level and the collaboration quality developed by tests brought together around the observatory projects.

It follows the work in WP4I information, where the participant analyzed the data processing and territorial indicators on level of EU and visualisation of this information. Data can also be gathered from territorial observatories or studies. These observatories are the most often public and work on territorial development. They gather territorial statistics for a defined territory, process and map the results. They are resource centres for other territorial actors. The WP4I group established the local accessibility of these indicators for each of the EU states. A table in the Deliverable 53 showing these indicators are not always available at the local level. Divisions by statistical sectors are very heterogeneous according to the countries and depend on different procedures of cuttings, which make the comparisons difficult, in particular because of the structural differences related to the representativeness of the populations included in each sector. Certain countries choose cuttings so that each zone contains a similar number of inhabitants, whereas other countries define following cuttings the morphology of urban zones. The data concerning these cuttings are rarely easy to access. The communal level seems to be the basic level for which the majority of the European countries have statistics on the various indicators. The definition of the communes through the countries of the European Union seems to be compatible with the research of a basic level, although this one is not perfect.

This basic level should not make forget that only a majority of the actors, in particular those which work on a city or district scale certain even, need finer data than those on a communal scale to highlight in a relevant way of dynamic, disparities or priority areas of actions.

Data mapping can appear nonrelevant for a certain number of territorial indicators. In these cases, a representation in the form of graph (bars, curves...) is often better. We can distinguish among the cases where the cartography is not adapted:

- data where the number of entity compared is too weak to make useful a cartographic representation;
- data where the differences of the compared values are too weak taking into consideration type of indicator to authorize an optimal reading of the results;

Different treatments and comparison protocols of territorial indicators are used by the actors as situations and contexts can be very different. Some general statements can be done about the mode of representation of the territorial indicators. The map is not always the best way to show the relevant information.

In brief, the indicators are virtually infinite: innumerable elements can be highlighted thanks to the construction of indicators based on population statistics. Their role is to give an account of a situation and to simplify the information by synthesizing it, by allowing a better communication and by authorizing cartographic comparisons. The guides treating the indicators underline that those have to show the facts, and not to be an end in itself (VERMEYLEN, 2006). The selection operated in the indicators within the framework of the CAENTI project meets these objectives while taking into account the indicators flexibility constraints, their ability to be transposable, to adapt themselves to the inconsistencies and lacks of the data at the European level.

As highlighted (cfr. *infra*), the cartographic representation of the indicators needs a relevant territorial scale to spatialize the collected data. It is important to recall that the great diversity of the actors being able to use the method CATALYSE inevitably makes the search for a relevant territory particularly complex.

The relevant territories can have different sizes and structures according to the type of actor to which one addresses oneself. Certain associations using the method CATALYSE deal with restricted districts whereas others work with the national or regional scales. It is obvious that their territories are different and that consequently the scale of represented indicators is also strongly variable.

Moreover, each relevant territory for an actor will require a higher reference level allowing the comparisons for example with the regional, national or European levels.

But it needs to compare the territories because the successful development is essential in the knowledge base society. Therefore in the WP4C Competitiveness research group initiated the collect of indicators of territorial competitiveness. The starting point was the determining of factors of competitiveness in the workgroup. After we defined the factors, what influences the territorial competitiveness. That is next: - Education & the Workforce (- level of qualification of the region's population, - supply and quality of institutions for human resource development in the region, - activity of labour market policy, - rate of employment), - Quality of Life & Social Capital (- access to cultural services and the nature of consumer habits, -

quality of social care and services, - level of healthcare and its infrastructure, - quality of recreational facilities, - quality of settlement environment), - Research & Development (- regional research activity ), - Technology & Innovation, - Transportation & Infrastructure, - Enterprise & Investment, - Business Climate. From the factors we initiated the set of the indicators, what needs to territorial developments.

<b>Indicators</b>
<p><i>Income level</i></p> <ul style="list-style-type: none"> <li>- Volume of taxable incomes per one tax-payer</li> <li>- Gross income serving as the basis of the personal income tax, per permanent population</li> <li>- Earnings from main activity/number of tax-payers</li> <li>- Entrepreneurial income/ number of tax-payers</li> <li>- Gross Value Added (GVA) per capita</li> </ul>
<p><i>Labour productivity</i></p> <ul style="list-style-type: none"> <li>- Gross Value Added per employer</li> <li>- Gross income serving as the basis of the personal income tax, per tax-payers</li> <li>- Profit before taxes per employer</li> </ul>
<p><i>Employment</i></p> <ul style="list-style-type: none"> <li>- Employment rate</li> <li>- Unemployment rate</li> <li>- Number of tax-payers per 1000 inhabitants</li> </ul>
<p><i>Global integration</i></p> <ul style="list-style-type: none"> <li>- Income from export per inhabitants</li> <li>- Integration of the trade</li> <li>- Number of foreign tourism nights at public accommodation establishments per 1000 inhabitants</li> <li>- Number of domestic tourism nights at public accommodation establishments per 1000 inhabitants</li> </ul>
<p><i>Research and technological development</i></p> <ul style="list-style-type: none"> <li>- Number of patents between 2000 and 2004 per 10000 inhabitants</li> <li>- Number of members of public body of Hungarian Academy of Sciences per 10000 inhabitants</li> <li>- R&amp;D units per 100000 inhabitants</li> <li>- Number of scientists and engineers per 1000 inhabitants</li> <li>- Current R&amp;D expenditures per 10000 inhabitants</li> <li>- R&amp;D expenditures per 10000 inhabitants</li> <li>- Capital R&amp;D expenditures per 10000 inhabitants</li> </ul>
<p><i>Small and medium-sized enterprises (SME-s)</i></p> <ul style="list-style-type: none"> <li>- Number of active companies and partnerships per 1000 inhabitants</li> <li>- Number of active small businesses (10-49 employers) per 1000 inhabitants</li> <li>- Number of active corporations with legal entity per 1000 inhabitants</li> <li>- Number of active small businesses (10-49 employers) with legal entity per 1000 inhabitants</li> <li>- Proportion of partnerships from the active enterprises</li> <li>- Owners' equity of the companies per 1000 inhabitants</li> <li>- Subscribed capital of the companies per 1000 inhabitants</li> <li>- Balance sheet total of the companies per 1000 inhabitants</li> </ul>
<p><i>Foreign Direct Investment</i></p> <ul style="list-style-type: none"> <li>- Staff number of enterprises with foreign direct investment per 1000 inhabitants</li> <li>- Owners' equity of enterprises with foreign direct investment per 1000 inhabitants</li> <li>- Foreign direct investment per inhabitant</li> <li>- Net revenue of enterprises with foreign direct investment per 1 inhabitant</li> </ul>
<p><i>Infrastructure and human capital</i></p> <ul style="list-style-type: none"> <li>- Number of university or college graduate employed per 1000 inhabitants</li> <li>- Proportion of leading intellectual employees from the employees</li> <li>- 18-X years old population, with at least secondary school general certificate, as a percentage of the same age group</li> <li>- 25-X years old population, with university, high school, etc. diploma, as a percentage of the same age group</li> <li>- Telephone main lines per 1000 inhabitants</li> <li>- ISDN-lines per 1000 inhabitants</li> <li>- Number of dwellings built per 1000 inhabitants</li> <li>- Number of building permits per 1000 inhabitants</li> </ul>

<p><i>Institutions and social capital</i></p> <ul style="list-style-type: none"> <li>– Proportion of disability pensioners below retirement age from the 45-59 years old population</li> <li>– Annual average internal net migration per 1000 inhabitants, 2000-2004</li> <li>– Number of pensioners, retirement provisioners per 1000 inhabitants</li> <li>– Active non-profit institutions per 1000 inhabitants</li> <li>– Full-time students of higher educational institutions per 1000 inhabitants</li> </ul>
<p><i>Economic structure</i></p> <ul style="list-style-type: none"> <li>– Proportion of active companies in real estate, renting and business activities from all active companies</li> <li>– Proportion of employees in agriculture from all employees</li> <li>– Proportion of employees in services from all employees</li> <li>– Proportion of non-manual workers from all employees</li> </ul>
<p><i>Innovative activity</i></p> <ul style="list-style-type: none"> <li>– Registered users of work-place, tertiary educational and other libraries per 1000 inhabitants</li> <li>– Number of lecturers of higher education institutions (by seat of institutions)</li> <li>– Number of lecturers of higher education institutions (by sections placed out)</li> </ul>
<p><i>Regional accessibility</i></p> <ul style="list-style-type: none"> <li>– Complex regional accessibility indicator</li> <li>– Domestic supplier accessibility indicator</li> <li>– Multi accessibility indicator</li> </ul>
<p><i>Skills of work force</i></p> <ul style="list-style-type: none"> <li>– Employees working at the residence with at least secondary school general certificate per 1000 inhabitant</li> <li>– Employees working at the residence with university, high school, etc, diploma per 1000 inhabitants</li> <li>– Average number of school grades</li> </ul>
<p><i>Social structure</i></p> <ul style="list-style-type: none"> <li>– Population aged 60 and over as percent</li> <li>– Population aged 0-18 as percentage of permanent population</li> <li>– Live births/deaths</li> <li>– Vitality index</li> <li>– Number of single person households per 1000 inhabitants</li> <li>– Share of inhabitants living in settlements with population density over 120</li> <li>– Proportion of central settlement's inhabitants from the sub-region's inhabitants</li> </ul>
<p><i>Decision centres</i></p> <ul style="list-style-type: none"> <li>– Number of active small and medium size corporations with legal entity</li> <li>– The sum of the company's owner's equity in the sub-region</li> </ul>
<p><i>Environment</i></p> <ul style="list-style-type: none"> <li>– Number of discovered publicly indicted crimes</li> <li>– Number of economy related discovered publicly indicted crimes</li> <li>– Number of general practitioners per 1000 inhabitants</li> <li>– Number of places of clubs for the aged providing day-time care per 1000 inhabitants aged 60 and over</li> </ul>
<p><i>Regional identity</i></p> <ul style="list-style-type: none"> <li>– Arrivals per 1000 inhabitants</li> <li>– Departures per 1000 inhabitants</li> <li>– Proportion of employees working at residence from the daily commuters</li> <li>– Proportion of intellectual employees working at the residence from the daily commuter intellectual employees</li> <li>– Promotion of daily arrival commuters from the daily departure commuters</li> </ul>

We started the WP4 program in 2006. On the Kick off Meeting in Besancon we organised the participants of “The spreading of fundamental methods and research design in territorial information analysis within the Humanities and Social Sciences” workpackage. In the first term we defined some scientific questions in each sub-task. According this we worked the first deliverables which it was documented the stat of the arts. This “State of the Arts” was presented on 1. Annual International Conference Territorial Intelligence Regional, Identity and Sustainable Development in Alba Iulia (Romania). The sub-task leaders met on more and more coordination seminar where it was confrontation more scientific viewpoints. The universities presented them research action of spatial analysis about territories. The most

important task was created the definition about territory and territorial process by University of Salerno. Beside the WP4M [Method] workgroup (University of Franche-Comté) widened the concept of territorial processing with economical, environmental and human development processes. In addition the WP4I [Information] group (University of Liege) collected the indicators what needs to research action and they gave a data inventory for territorial actors. This information also appeared the WP6 “Conception and dissemination of methods and tools of territorial intelligence accessible for the territorial actors and respectful of a sustainable development ethics”. Therefore in 2007 the WP4I and WP4 [Competitiveness] groups created the WP6I sub-task where the participants cooperated the WP6. In WP4I the contributors described the data processing and data mapping. In this work the main partner was the Scientific Research Centre of the Slovenian Academy of Sciences and Arts. They gave a geographical frame to works and the participants assigned some indicators what indicate the territorial development. It shows on territorial-intelligence web site. Cooperating with WP4I the WP4C [Competitiveness] (University of Pécs) defined the factors of territorial competitiveness. The Wp4P [Project] (University of Franche-Comté) coordination group selected 45 projects using relevant key-words for territorial intelligence and crossing several research modes: by studying repertories and databases but also by making direct requests on Internet. These projects essentially concern the social and environmental impact of the research supported by the European Union and some projects about social exclusion. Only five projects can still be contacted. However, they do not all claim being territorial intelligence projects and they are essentially research projects, which cannot be compared with the CAENTI actors, on the occasion of a seminar, as we basically expected it. The General Directions of the European Commission do not have information and do not fund relevant projects in the territorial intelligence field, except the information and projects that are published on the European Union official website. According to these observations, the Wp4p coordination group suggested a new orientation of research activities about the territorial intelligence uses, which came true with the suggestion of a new coordination group, the so-called wp6u, during the Territorial Intelligence International Conference of HUELVA in October 2007. In 2007 the main task were the reports about sub-task. Each sub-task leader presented the reports on 2. Annual International Conference Territorial Intelligence and Governance. Participative action-research and governance applied to territorial development in Huelva. After second conference we reorganized the sub-tasks and from WP4M and WP4T groups became to WP6T group and from WP4I and WP4C transformed to WP6I [Internet portal] group. In 2008 we started the WP4S [Synthesis] (University of Pécs) program. The

first task was evaluation of reports on second coordination meeting in Pécs. On this meeting we also prepared the next annual international conference. In mid of 2008 we have ready all the documents of WP4 and these gave a direction to report of synthesis. The last task was in the workpackage the preparing of 3. Annual International Conference Tools and methods of Territorial intelligence in Besancon where we presented our research actions. Besides we used the CooSpace preparing of meeting and loaded up more and more documents.

### **2.4.3. Workpackage 4 “Methods” deviation from the project workprogramme**

According to the observations, the Wp4p coordination group suggested a new orientation of research activities about the territorial intelligence uses, which came true with the suggestion of a new coordination group, the so-called wp6u.

### **2.4.4. List of drafted documents and next deliverables of workpackage 4 “Methods”**

#### **2.4.4.1. Drafted documents**

Miedes Ugarte B., Sánchez López C. Territorial information, labour market and territorial competitiveness. Local Employment Observatory of Huelva University.

Ács Péter, Territorial and social research actions and info-communication tools, University of Pécs.

Moreno Moreno A., Pérez Morales G., Local labour market delimitation: Analysis of an algorithm of regionalization, Local Employment Observatory of Huelva University.

Breuer C., Devillet G., Participative construction of a territorial strategy: Strategic planning of action for the districts of Huy and Waremme analyzes. SEGEFA, Université de Liege.

Natale A., Globalizzazione e nuovi processi di sviluppo regionali - Globalization and new regional processes of development, Università di Salerno.

Kékkő O., Micro regionals social processes in sustainable development, University of Pécs.

Béres Csaba Z., E-government services and the 5th level of CLBPS, CCSOft.

Póla, P., Regional competitiveness and local development, Centre for Regional Studies of Hungarian Academy of Science, Transdanubian Research Institute.

Koltai Z., Competitiveness of Hungarian cities, University of Pécs.

Ormaux S., The methods of territorial intelligence, Université de Franche-Comté.

Devillet G., Information and indicators of territorial research actions, University of Liege.

Champollion P., The territorial process and territorialisation, Observatoire de l'école rurale et University of Salerno.

Filó C., Indicators of territorial competitiveness and the territorial intelligence, University of Pécs.

#### **2.4.4.2. Deliverables**

Del. n°	Deliverable name	WP n°	Date due	Delivery date	Estim. P/M	Used P/M	Lead contractor
23	State-of-the-art about fundamental methods and tools of spatial analysis and of processing of territorial information within the social sciences and humanities.	4	10	10	6	9	UFC
24	State-of-the-art about the territorial information available on Internet and in the European sources.	4	10	10	5	6	ULG
25	State-of-the-art about the EC projects and the GDs information.	4	10	10	5	4,4	UFC
26	State-of-the-art about the territory concept and the territorialisation process.	4	10	10	5	5,5	UNISA
27	State-of-the-art about the territory competitiveness concept.	4	10	10	5	7	PTE
28	Inventory of fundamental methods and tools of spatial analysis and of processing of territorial information within the social sciences and humanities in Europe.	4	22	22	6	5,85	UFC
29	Reasoned catalogue of territorial information available on internet and sources in Europe.	4	22	22	5	4,26	ULG
30	Report of evaluation on EC relevant projects and DG's information.	4	22	22	7	2	UFC
31	Report about the concept of territory and the process of "territorialisation".	4	22	22	5	3	UNISA
32	Report about the notion of competitiveness of territory.	4	22	22	6	4,2	PTE
33	Final scientific report of synthesis on territorial intelligence.	4	36	36	8	12,5	PTE
					63	63,71	

**2.4.5. The workpackage 4 “Methods” specific prospects (databases to be maintained and up-dated, research projects to be carried out, Csilla Filo : 1 page *maximum*)**

The WP4 produced a set of réflexions that will be followed after caENTI because the relations created between the teams and the researchers has become perennial.

The “Methods” workpackage also produced transfers that are already promising:

- - The European database of the research teams on territory will be analysed and put online on the basis of an actio led by the laboratory THÉMA of the Université de Franche-Comté, in cooperation with the Università di Salerno. An international widening on the website [territoiresnet.org](http://territoiresnet.org) has also been initiated with the Latin-American network [territorios.org](http://territorios.org).
- The European webmapping of the territorial indicators is also a project that will continue under two shapes : with the adding of new indicators, better adapted to sustainable development on the one hand and with regional experiences at the infra-communal level on the other hand.
- Lastly, the specifications for an online repertory of the territorial intelligence actors and a development project were made within the wp6u framework.

After caENTI project the participant will prepare a new MASTER degree “Territorial Intelligence” with 5 European University as university of Franche-Comté (France), University of Huelva (Spain), University of Salerno (Italy) University of Liege (Belgium), University of Pécs (Hungary). In these studies, we would like to give a new European perspective about territorial science in particular the global analysis method, data processing, new indicators and web-mapping. We think it needs for next generation in knowledgebase society and sustainable development. The global trend in the spatial analysis is the complex regarding and the researchers, territorial actors and experts consider the scientific diagnosis as a normative direction.

So in 2009 we continue our research actions within European Network of Territorial Intelligence and we spread the activities of researchers and dissemination of methods.

In 2009 we will give a new perspective to territorial intelligence because in Salerno we will organize a conference about “Territorial intelligence and culture of development”. The cultural aspect is very important factor of territorial process. The quality of the human environment is indispensable in a regional development process. The exploration of this examination, the qualification of the people and living on the area and the development opportunities is necessary for an area's traditions because of this. We would like to if this conference would be attached to the conference to be organized by University of Pécs in

2001, Pécs host the European Cultural Capital programs, where a preference is constituted the cultural processes.

***2.5. Workpackage 4 [Fundamental Methods] The spreading of fundamental methods and research design in territorial information analysis within the Humanities and Social Sciences. Workpackage leader: Csilla FILÓ, University of Pecs***

The WP4 aims at improving the dissemination of spatial analysis and territorial information processing methods and tools within the Humanities and Social Science and at increasing the territorial information use.

These objectives have been divided into five scientific coordination activities during the two first periods. A synthesis of these research activities was made during this third and last period.

Thus, this part presents the workpackage 4 global objectives and organization, the progress toward objectives of the WP4 and of its coordination groups, the deviation for the project workprogramme, the list of deliverables and the projects of the WP4.

**2.5.1. Workpackage 4 “Methods” objectives, work starting point and organization**

**2.5.1.1. Objectives of the WP**

**WP4 [FUNDAMENTAL METHODS, PTE]** The spreading of fundamental methods and research design in territorial information analysis within the social sciences and humanities pursue three objectives:

1. Improve the diffusion of the methods and fundamental tools of spatial analysis and the processing of territorial information within the social sciences.
2. Increase the use of territorial indicators.
3. Define the concept of territory in the multi-field context of the integrated approach and the indicators of competitiveness in this approach.

This work package animates five scientific coordination reflexions:

The WP4 has the following objectives:

4. Improve the dissemination of the methods and tools of spatial analysis and of processing of territorial information within the social sciences and humanities.

They are methods and tools of wide-applicability such as geographical and spatial analysis information systems, qualitative and quantitative data analysis and info metrics of the professional tools used by the territorial actors.

5. Increase the use of territorial information. In parallel, these methods and tools help improve the use of territorial data, within the social sciences and humanities, where their dissemination remains limited and unequal depending on the disciplines. An analysis of European Commission relevant projects and of existing information in the DGs that might be relevant to the field. This would be useful to avoid work on topics, which had been previously dealt with.
6. Define the concept of territory in the multi-field context of the integrated approach. The intelligent use of territorial information and of its instruments calls for the need to deepen the analysis of the concept of territory and of the processes of “territorialisation” (site specification). We will be particularly interested in the definition of the indicators of competitiveness of territory in a global approach.

They had been conducted within five scientific coordination activities:

**WP4M [Methods, UFC]** Inventory of the fundamental methods of territorial information, leader S. ORMAUX, UFC.

**WP4I [Information, ULG]** Comparative inventory of European territorial information, leader G. DEVILLET, ULG.

**WP4P [Projects, UFC]** Evaluation of projects funded by European Commission and of information in the DGs in the field of territorial intelligence, leader J.-J. GIRARDOT, UFC

**WP4T [Territory, UNISA]** Concept of territory and process of site specification, leader P. CHAMPOLLION, UNISA.

**WP4C [Competitiveness, PTE]** Indicators of competitiveness of territories, leader C. FILO, PTE.

These coordination activities are divided in three annual tasks: make a state-of-the-art in 2006 the comparative research in each domain 2007. A synthesis was performed in 2008.

### **2.5.1.2. Work starting point**

In the first term we organized the research work of teams. Each task leader defined the activities and created some scientific question to research actions. These questions follow:

#### **WP4M [Methods]**

- Which generic methods of wide applicability (such as the GIS) are used to study the territories and to analyse the territorial information in the SHS?
- In which disciplines are they used? Which European laboratories manage them best? How to improve their dissemination within the SSH?
- Which methods can provide modules for the design of tools?

#### WP4I [Information]

- What are the main sources of territorial information that are available for the researchers in Europe, at the European, national, regional and local levels?
- What are the twenty most relevant territorial indicators for the actors of the sustainable development of territories?
- What are the main difficulties of comparison of this territorial information?

#### WP4T [Territory]

- What are territory, territoriality, and territorialisation?
- Territory space, network space, community.
- Are there different disciplinary approaches of the territory?
- What is territorial development actually?
- Who are the territorial actors?
- What is the relevant territory for the sustainable development?

#### WP4P [Projects]

- What are the projects funded by the UE (research and action) that we can consider as Territorial Intelligence projects?
- How to select the most relevant projects?
- Which GD information is relevant for Territorial Intelligence?

#### WP4C [Competitiveness]

- Which are the factors of territories competitiveness? (amenities, accessibility, human resources, industrial network, innovation, governance, labour market, social protection, cultural heritage, environmental protection..)?
- What are the most relevant indicators?
- How to compare these indicators at the European level?
- Competitiveness governance and territorial marketing.

As general plan, each scientific coordination group should aim to make a state-of-the-art in 2006, then to enlarge upon a European inventory of skills in 2007, with a synthesis in 2008.

Since January 2008, all the activities were coordinated in the coordination group Wp4s.

### **2.5.1.3. Organisation of the coordination activities in the WP**

As regards the workpackage organisation, small coordinations meetings were organized by the thematic coordination groups in the two first period.

During the third period, the synthesis group ended the tasks the thematic coordination groups have started and liked at deepening more:

- The work started by Wp4m in 2006 about the geographic information systems.
- The European state of art about the concept of territory that SALERNO began this state of the art will include an international bibliography and a listing of European laboratories which are working about territory.

It made two connections before the global synthesis:

- Wp4i worked with Wp4c in Wp6i to draft the specifications of the Portal of territorial intelligence information.
- Wp6m worked with Wp6t, within the framework of the European census of the teams that work on territory, it is planned to identify those that use the quantitative type methods. Made from the Internet websites, this approach complete the questionnaire surveys started in 2007, but that did not receive a satisfying answer rate.

Then, the research coordination group Wp4s “Synthesis” aimed at drafting the final scientific report of synthesis on territorial intelligence from the states of the arts the separate coordination groups have established. In this task we harmonized the reports about the territories, researches methods and information. This work was begun in 2008 leader by University of Pécs. In 2007 the workgroup reorganized the WP4 and the subtasks of Method and Territory worked follow as the territorial observation and research activity and besides the groups Information and Competitiveness defined the indicators of territorial process and competitiveness. In the Synthesis the contributors gave to research actions an aspect of new methods where firstly they defined the territory and territorial process regarding EU. In this work the Territory and Methods groups created a so territorial definition where we could regard the dynamic processes as territory and in the relationships like human and environmental determinants are very important factors. This dynamic territory definition deepened the data collection and from it the indicators of competitiveness. We presented this process in the caENTI of deliverable 33.

Wp4s started the tasks of synthesis in the Coospace. We will create a form for collecting of research actions that we can compare our activities.

Folowing researchers or actors were associated to the WP4 activities.

Péter ÁCS, associate professor of ICT, PTE, territorial competitiveness, digital governance

Natale AMMATURO, professor of sociology, UNISA, territorial intelligence projects and information

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#### **2.5.1.4. Coordinations activities**

##### **24-25 of March, 2006 BESANCON (France) Kick of Meeting.**

Aim of meeting within WP4: distribution of user and password to Coospace system, where we can organize the programs, tasks and meetings within WP4.

##### **7 of June, 2006 BESANCON (France) Seminar WP4 for task leader**

(Participants: J.J. Girardot, S. Ormaux, G. Devillet, Cs. Filó, P. Champollion)

Objectives of leader meeting:

Defining the tasks actions and some question where about we wait for (look for) answer. Because this scientific questions give directions of Workpackage 4 [Fundamental Methods] The spreading of fundamental methods and research design in territorial information analysis within the Humanities and Social Sciences.

#### **29-30 of June DURBUY (Belgium) Seminar WP4 Information [WP4I]**

The meeting discussed the first proposition of themes and indicators, presented by D. Chen during the previous communication. Each participant received a copy of this proposition and together decided which themes/ indicators are retained. Another sheet was distributed to the participants, that shows the presence or not and the lower spatial level of the proposed indicators that can be found for 10 European countries in their national Internet site. However, J.-J. Girardot decided to not take account of these data at this first step of work, as the missing data could be built later by us.

Themes:

- Population: retained
- Socio-economic conditions: retained
- Employment: retained
- Dwelling: retained

#### **4-5 of July 2006 Aix en Provence (France) Seminar Wp4t Territory**

The central question of WP4T: “From « when », that is to say from which type and which level of « organization », a natural or human « space » becomes a « territory », that is to say from when the process of « site specification » is developing?”

Themes:

- Rural school organization facing demography evolutions, Territorial actors and competences sharing
- The school territorial base
- Forms of school organization, Areas of school recruiting
- Territorialisation of educational and vocational offer
- Questions of problematic, questions of methodology

#### **6-10 of July 2006 University of Pécs (Hungary) coordination meeting of Wp4c Competitiveness**

The team of University (Pecs) presented the WP4 Competitiveness for researcher, students and actors.

Themes:

- Defining the developable territorial unit
- Factors of competitiveness
- The development tools needed to face the challenge

#### **10-15 of October 2006 at University of Franche-Comté (France) WP4 coordination meeting**

At University of Franche – Comte we created the intermediate report of WP4 within CAENTI project. In this paper we presented the first midterm of WP4, which we organized the participants, tasks and the timetable.

#### **16-17 of November 2006 at University of Pécs (Hungary) coordination meeting of WP4C Competitiveness**

The team of University of Pecs organized a scientific meeting about territorial competitiveness where we evaluated the European project and studies in theme of competitiveness

#### **17 of November, 2006, LIEGE (Belgium) WP4P organized a coordination meeting**

To animate a telephonic meeting in order to concretely determine the orientations previously defined in ALBA IULIA.

#### **11-12 of May 2007 Salerno University (Italy) Annual coordination meeting**

The first important coordination action was the annual meeting of WP4 in Salerno May, 11th and 12th 2007. The detailed program and report of meeting was publish in the document: tia070710\_wp4\_reportmeetingSalerno.doc

Every team within WP4 made the state of the art to 31 December 2006. In these studies, it appears the cooperation of coordination works. These studies suit the CAENTI conceptions. In coordination works, we searched the relations between sub-tasks method,

information, project, territory and competition and within the CAENTI. Fortunately, in Salerno the leader of WP5 (Blanca MIEDES) represented the work package “Governance”. So, we could evaluate the deliverables aspect of relations and cooperation. In this meeting we tried to enhance the CooSpace use. We will upload every document on CooSpace about CAENTI and we will use the chat and forums. We were glad to present the WP4 within CAENTI at the University of Salerno.

Before meeting, on 8th-10th May 2007 the University of Salerno organized a conference. Title of conference was TERRITORIAL INTELLIGENCES, REGIONAL IDENTITIES AND SUSTAINABLE. Here the members of CAENTI could present the own research action within territorial intelligence. In this conference we could get a multidimensional approach to the territorial intelligence and territorial research action in additional territorial process.

- - Coospace and other coordination activities
- - Joint or cross activities with others WP
- - Coordinated research activities, task worked, participants involved
- - Results
- - Drafted documents

### **8-9 of September 2007 Leader meeting in Besancon (France)**

The aim of Leaders Meeting was to evaluate the present situation. Therefore, we evaluated the tasks of WP4 and we decided that the WP4 Method and Territory sub-activities would integrate and the WP Information and Competitiveness also. Consequently, we had to organize our programs on the Second International Conference.

The second coordination meeting on October 24th, within HUELVA Conference.

The aim of this meeting was:

- Evaluating the 3rd period and the second mid-term report
- Transforming the groups of sub-activities
- Harmonizing the report of sub-activities
- Planning the WP4 Synthesis sub-activities
- Preparing of next coordination meeting in Pécs 2008

On the meeting we evaluated the 3rd period in the project after the second mid-term report. Because of five sub activities finished on the 31 of December 2007 we created the new

processes within the WP4. We transformed the WP4 Methods and Territory groups where the both teams would cooperate. Serge ORMAUX and Pierre CHAMPOLION lead the new group Methods and Territory. The main object would be the harmonizing the territorial processes and research methods of these. After 31 of December 2007 this team would joint to WP6 European Observatory of School like the WP4 Information and Competitiveness, because works of these groups would finish on 31 of December. They would joint to WP6 Internet Portal. The situation of WP4 Project is very special because the tasks of this group were analysis of European Commission relevant projects and of existing information in the DGs that might be relevant to the field of territorial intelligence. In the first period we could choose 45 projects but in these we could not find projects which are adequate to our requirement.

The presentation described the objectives of WP4. After the five coordination activities was presented with time table and deliverables in 2006 and 2007. Then coordination meetings demonstrated the activities of the work packages. Finally, each group leader presented the works of second year and we discussed the significant details because it needs to clear to our next assignment in 2008. This task would be the Synthesis sub-activity in which we will sum up the five parallel research processes (Wp4s). The last point of meeting was the preparing of next coordination meeting in PECS 2008.

Coordination meeting in Liege on 16 of February 2008

This coordination meeting aims at:

- Reporting of working of WP4 in previous period
- Validating of deliverables of WP4 and closing of sub activities (Method, Information, Territory, Project and Competitiveness)
- - Planning of Synthesis of WP4
- - Planning of joint activities with WP6

On this meeting the team's leader of WP4 closed the period of separate sub-activities.

#### **4-5 of April 2008 Besancon (France) the first global coordination meeting**

It defined:

1. The final plan of the two "pre" syntheses in WP4 Fundamental Methods between wp4t territory and Wp4m methods, on the one hand, and wp4i information and wp4c, competitiveness, on the other one, following the strategy initiated in Huelva conference 2007.

2. The links with the other workpackages, particularly between wp4i+c and the wp6p in charge of the specifications of a European portal of territorial information, and between wp4t+m and the wp6s in charge of the specifications of a territorial information community system.
3. The programme of the next coordination meeting in Pécs, and seminars, and the structure of next reports and deliverables.

### **29-31 of May 2008. University of Pécs (Hungary) annual scientific coordination meeting**

Pécs has given an opportunity to hold the conference here again of ENTI after 2004. The main topic of the conference the regional information, the methods of the usage of indicators and tools. Scientific lectures were over on the conference about territorial intelligence, the relationship of the labour market and regional competitiveness, the regional researches and ICT and his background, employee and searching in the human geography, human resource management in South Asia and socio-economic transformation of Dalits in Independent India.

On 30 of May the participants discussed about ready reports in the framework of WP4 meeting. Then Jean Jacques Girardot the co-ordinator of CAENTI project reported on the results of the project until now and the additional views, and then the participants talked over organizing the conference of Besancon 2008 for the workshops. At last we discussed the row WP4, in which the members defined the tasks of a synthesis and the deadlines.

On 31 of May we organized the meeting of WP6 where the project co-ordinator defined the next tasks and deadlines in 2008.

The workshops of conference related the main topic. The theme of the first workshop was territorial development and tools. We could hear about: territorial consciousness of ethnic minorities, role of the green civil organizations in Southern Transdanubian Region, learning and searching in the virtual space and mental mapping, community mapping.

The topic of second workshop was new territorial approaches and methods in the sustainable development and new territorial processes in regional development. In this workshop we debated the problem of globalization and new regional processes of development and participative construction of the territorial strategy.

The title of workshop 3 was the territorial information and territorial competitiveness

The themes of presentation were the micro regional social processes in sustainable development, e-government services and the 5th level of CLBPS, regional competitiveness and local development, competitiveness of Hungarian cities.

In the workshop 4 the report of fundamental methods (WP4) was presented by leaders.

Results:

They were presented on the international conference the territorial intelligence the new research activities of projects. On the coordination meeting WP4 the leaders discussed the reports and it was prepared and organized being found the current work program of 3<sup>rd</sup> international conference of ENTI. In the synthesis subtask the preparation works began on this meeting.

#### **4-5 of September 2008 LJUBLANA (Slovenia) SAZU coordination and scientific meeting**

This meeting aims to reinforced the integration of the coordination group Wp4i within coordination group Wp6i that drafted the specifications of the European portal of territorial indicators. Wp6i presented the prototype of web mapping end the new topics, rights and metadata, were engaged.

##### **2.5.1.1. Joint or cross activities with others WP**

WP4 used WP3 portal and Coospace.

WP4 and WP6 always have joint activities to compare territorial information and territorial indicators.

WP4 and WP5 were often linked for research activities on territorial projects.

##### **2.5.2. Workpackage 4 “Methods” progress toward objectives**

Here we present progress and results of all the coordinated research activities of the WP4, with a short summary dor the tasks of the two first period of caENTI.

##### **2.5.2.1. Wp4m “methods” progress– Group leader Serge ORMAUX (UFC)**

In **WP4M [Methods]** the coordination group subjected the methods and generic tools that are used by the researchers in social sciences to study territories. The main kinds of methods that are used are evoked, and there are links with the answers of the survey which was made with the members of the WP4M. The coordination group propose to distinguish in a first time two kinds of methods: methods for analyse and methods for simulation. In

methods for analyse, territories are mostly analysed by using spatial frameworks where space is divided in discreet spatial units. Social, demographic, economic or environmental data are aggregated into these units. Statistical methods are then used to analyse the territorial content defined by the variables. Two main families of statistical methods are usually distinguished: exploratory methods and inferential methods.

- The exploration of a territorial data is commonly based on factor analyses which are able to identify their main structure. Two principal methods can be used: principal component analysis and multiple correspondence analyses. Another way of analysis consists in defining a typology of spatial units. The aim is to summarize the information describing the spatial units by a simple set of categories.
- The second type of analysis method belongs to the inferential methods, where the analysis is focused on a precise character that one seeks to explain from others characters. In a simplified vision, we can say that two kinds of methods are available. First is the regression, used if the character of interest is quantitative. Second is the discrimination, if it is qualitative. This approach leads to compute estimated values of the variable of interest and to extract residual values by comparing reality and model. These residues are of a primary importance because they represent the local specificities of each spatial unit.

**Methods of simulation.** For thirty years, the research in social sciences takes an interest in the elaboration of tools which allow simulating the spatial dynamics of territories. These simulation tools have been developed thanks to the progress in computer sciences. Considering the case of spatial simulation modelling, there are two requirements:

- The model must integrate the spatial dimension.
- The spatial simulation model must give the possibility to test many scenarios according to different assumptions.

Indeed, the interest of the spatial simulation is not really in their capacity of prediction, but in their capacity of testing many combinations of factors, many types of interactions which are too complex to be analysed without any simulation tool.

Different kinds of simulation models exist. Most of researcher considers that three types of spatial models can be used to support participative approaches:

- Models that are on a mathematical nature.
- Models that belong to the field of distributed artificial intelligence.
- Model that are based on the use of fractal geometry.

All these methods seem well adapted to design tools that are usable by territorial actors. But the transformation of the generic methods into territorial management tools

requires a genuine transposition process. It also requires taking into account the available data and information.

### **2.5.2.2. WPpi “information” progress - Group leader Guénaël DEVILLET (ULG)**

In Wp4i the participants conceived the policy of sub-activity.

1. The first set concerns the main themes. The researchers need to realise their investigation by themes. So, it is our work to identify them to make their research easier. At the same time, it is important to take account of the field data collection problems.
2. The second set concerns the data that are in direct link with the guide:
  - 2.1. In the guide, which data do we need to deepen our analysis?
  - 2.2. Which indicators can we suggest for the analysis of the guide at the regional level? (which sources?) and also at the national and the European levels.
3. For the third set of questions, it is about data that do not have a link with the guide, but have a revealing role for the territory. These data can be useful for the logic of catalyse, i.e. as an extension of a descriptor, as well as contextual data in a more general way (e.g. on environment). Actually despite that the majority of the partners have a social oriented approach of sustainable development, the territory indicators must cover all the aspects.

The work made in the WP4I leads also to another set of questions. The scale and the theme of the contextual data (no manipulated) change according to the countries. For example in Belgium, very few data are available on health. This strengthens the function of the local observatory. According to the country, its creation needs a good knowledge of external available data, so we can use what already exists as reference and then elaborate a complementary data collection. For example, mobility to the workplace is a new indicator that is often used now. Another example is the data on environment and its perception.

Following reflection suggested for the WP4I:

What about the rights on data? Consultation vs. Utilisation (Which conditions?)

- Can we use the not free data?
- Enlarge the needs, above Optima and Integra.
- Use the help of partners to deepen the knowledge on partner countries and then look for a small group next year to go further.
- What about the metadata information (periodicity of the data...) to give a scientific value to each item of data?
- What about the manipulation of data?

The first step of WP4I is to establish which themes and indicators are needed within the social sciences and humanities, and parallel to this, we have to consider what indicators

are actually available on Internet. In this context, a research and analysis over European territorial observatories, international and national statistical sources have been led. Discussions between the WP4 teams were held to choose among a first proposition of themes and indicators and to exchange different points of view. The difficulties that appeared during our researches are also underlined.

### **2.5.2.3. Wp4p “projects” progress - Group leader Jean-Jacques GIRARDOT (UFC)**

This part relates to the activities that were made in the framework of the evaluation of projects funded by the European Commission and of the existing information of the GDs that might be relevant in the territorial intelligence field. Its objectives can be formulated under the form of two questions:

1. Among the projects that were supported by the European Commission, which of them have an object corresponding to the questionings of the territorial intelligence?

2. Which relevant information for territorial intelligence the General Directions of the European Commission have, in addition to those that are published on the official websites?

It is a specific activity, insofar as it corresponds to a suggestion of the CAENTI project evaluators.

At the end of the year 2006, a first selection of 45 projects was made by using a selection of key-words relevant for territorial intelligence: territory, community, territorial development, sustainable development, governance, participation, partnership, global approach, transparency, information and communication technologies, ICT, knowledge-based society and citizenship (see deliverable 25). This selection crossed several research modes: from repertories and data bases but also by making direct requests on Internet.

The wp4p coordination group have two objectives dor the second period:

- To deepen the first selection of projects
- To make the intersection study between the GD, European programmes and management centers.

The coordination group was reorganized by countries and languages. As the objective of this group was the selection of the projects, the coordination group will be widened to CAENTI actors.

The two prospects achieved by the wp4t coordination group have proved to be unprofitable.

Among the 45 projects funded by the European Union that we had noted as belonging to the territorial intelligence field, only 5 projects could have been contacted and were still unexplored (see deliverable 30 appendix 2)

About the intersection study, we consulted all the General Directions of the European Commission about the information they had and the projects they funded and that could be relevant in the territorial intelligence field. We wrote to the following General Directions: Management of information systems - Common research centre - Europe Aid - Economic and Financial Affairs - Firms and industries – Concurrence - Employment, Social affairs and equal opportunities – Agriculture - Energies and transports – Environment - Information society and medias – Research - Fisheries and maritime affairs - Internal market and services - Regional policies - General affairs - Education and culture - Taxation and customs affairs- Security - External relations - Trade - Development and ACP relations. We even wrote three times to some GDs when necessary. The most frequent answer we received was to consult CORDIS, as well as to get territorial information on funded projects (see deliverable 30 appendix 1)

We concluded that there are no relevant information for territorial intelligence the GDs have in addition to those that are published on the EU official websites.

All the relevant projects funded by the GDs can also be found on CORDIS. The selection of projects we made by using the official website is the most complete that can be done.

Because we are essentially concentrated in projects, the wp4 group suggested a new research orientation (about the territorial intelligence uses), which was concretised with the proposition of a new coordination group about uses within the framework of the work package 6, so-called the wp6u group, in order to constitute an analytic repertory of territorial intelligence projects.

#### **2.5.2.4. WP4t “territory” progress - Group leader Pierre CHAMPOLLION.**

The coordination research activity **Wp4t** aims to summarize the present state of scientific thought about territory, territoriality and process of site specification. In this way it uses recent scientific works which were leaded between 2004 and 2006 by REIT and CAENTI in Pecs (HU, 2004), Liège (BE, 2005), Aix-en-Provence (FR, 2005 & 2006) Alba Iulia (RO, 2006), Huelva (ES, 2007) and Besancon (FR, 2008). From different disciplinary

approaches, as from main fundamental questions, a first interdisciplinary definition can today be suggesting. Territories refer to “places, not obligatory adjacent, networked, fitted together into changing scales, productive of meaning and identities” (CHAMPOLLION & POIREY, 2004). So “there is no territory, included immaterial territory, without collective projection of their actors on to a communal structuring future, which generate identity and symbolic” (CHAMPOLLION & PIPONNIER, 2005).

Wp4t presently work to elaborate a European state-of-the-art that includes an international bibliography and a listing of the scientific laboratories which work about the territory issue. During the second conference of territorial intelligence of HUELVA (Spain) on October 24<sup>th</sup>-26<sup>th</sup> 2007, the Wp4t leader can not present the first composition of the international state-of-the-art about territory because the health state of the researchers who made the survey on European research about territory don not allow her finishing or giving its partial results to the Wp4t researchers.

The Wp4t also work on the appropriation of the territory concept by the local actors within the framework of sustainable development. The Wp4t team met with the CAENTI territory actors OPTIMA in SERAING (Belgium). They compared its interdisciplinary definition of territory of Wp4t with the real and actual needs of the local actors, so as an operative definition of territory can be elaborated.

For OER and OPTIMA territory is an organized social-spatial global system, which is limited in time and space. It presents the five next interdependent characteristics:

- It is built by actors and appropriate by inhabitants.
- It is based on collective project, which are looking for common future.
- It comes from patrimonial past.
- It is at the same time lawful (institutional), real or lived (territory of action and live) and dreamed (symbolic).
- It generates identity (identities) and symbolic(s).

These exchanges have produced an scientific paper for the international revue NETCOM (end may 2008). His title is: *Observatoires numériques et pratiques citoyennes : des outils d'intelligence territoriale au service du développement durable ?*

#### **2.5.2.5. Wp4c “competitiveness” progress - Group leader Csilla FILO (PTE)**

The 21st century sees changes in modern society, social structure, territorial policy, public administration and other fields, generated by the European Union, which have a

significant impact on the functioning and efficiency of society. For real competences to find their appropriate places and levels, a mature society are required as well as the investigation and improvement of the maturity of territorial levels prior to implementing any measures.

In this subtask we present our concept about territorial competitiveness and this relation to territorial intelligence, that was the main task coordination research activity Wp4c [Competitiveness]. It aimed at defining the factors of competitiveness.

- Economic structure (To what extent do local economic actors contribute to the sustainable development of the region and its potential to retain population?)
- Innovation (To what extent can local authorities and economic actors co-operate in shaping the future of the region?)
- Accessibility (The level of development of a region is greatly determined its physical-infrastructure, and ICT (info-communication technology) conditions.)
- Qualified human resources (The role of human resources has been upgraded during the expansion of cognitive society and globalization. Social factors therefore obviously correlate with development potentials in a given area, not so much in the number of active workers but in training, qualification and professional knowledge, which are indispensable conditions of competitiveness today.)
- Cultural and natural environment (how can influence the cultural and natural processes the development of regions)

Currently, there are several, well known definitions of territorial competitiveness, which interpret the approach of competitiveness on territorial units variously. Competitiveness is often viewed as a key indicator of the success or failure of policy. The concept of competitiveness, however, while relatively clear when applied to enterprises, is more difficult to define and measure when applied to regions or countries. An industrial region, for example, is not directly competing against a predominantly agricultural region or a financial centre, so the measurement of its relative competitiveness is problematic. Moreover, the term itself tends to convey the impression of a win/lose situation, in which regions can improve their position only at the expense of others, whereas, in practice, there are mutual gains to be achieved from individual regions becoming more competitive.

This concept of competitiveness aims to achieve a local specialization that enables different territories to cooperate in a context of general development.

Territorial competitiveness means:

- Taking the area's resources into account in a bid for overall coherence;
- Involving different players and institutions;
- Integrating business sectors into an innovation dynamic;

- Cooperating with other areas and linking up with regional, national and European policies as well as with the global context.

Our concept of territorial competitiveness has gained ground in academic, policy and practitioner circles. In particular, regional competitiveness has generated a large literature. These are described formerly. But the territorial competitiveness differs to regional competitiveness. This difference offers to approach. According to dynamism and spatial analyzing the territorial determination oversteps on the regional competitiveness. The base of regional competitiveness is the incoming and the product contrary with territorial competitiveness where the base is the innovate process in sustainable development.

Sum up, the territorial competitiveness diverges from regional competitiveness so that applies the methods of analysing but it considers in process the information concern this information will be jointed to challenge sustainable development.

Territorial competitiveness is an integrated and proactive approach to shaping the future of territories, regions and larger geographies – to some degree it can also be referred to as spatial planning. It goes beyond traditional regional policy as it brings together economic, social and environment opportunities and concerns as well as other factors which influence where activities takes place, how different places function and are connected, and what conditions are offered for living and doing business.

Territorial competitiveness strategies can help exploring potentials for economic growth and jobs and at the same time support an enhanced quality of life by helping to meet the challenge of sustainable development.

Our work firstly we compared the theoretical literatures of competitiveness from classical theory to urban growth theory across on neo classical theory, Keynesian economic theory, development economics and new trade theory. Besides we investigated the modern definitions about it for examples: OECD, DGIII of EC, European Competitiveness Report, Second Cohesion Report of the EU etc. In this papers the concept of competitiveness, as seen in the EU, could be summarised as “high and rising standards of living and high rates of employment on sustainable basis”.

The traditional measure of competitiveness/standards of living is generally calculated by the GDP per head, despite the fact that some other indicators should be defined in order to integrate the social, environmental, health and well-being dimensions. GDP per head can be broken into two main components: employment rate (proportion of working age population in work) and productivity (GDP per person employed).

Consequently, the EU places emphasis on structural factors underlying competitiveness which determine the long-term growth, in particular research and innovation, information technology and human capital.

This commitment was confirmed by the ultimate objective of the Lisbon European Council, which has stated that “the EU becomes the most competitive and dynamic knowledge-based economy in the world over the decade, capable of sustainable economic growth with more and better jobs and greater social cohesion”. There is a clear relationship between innovation, human capital and information technology when it comes to competitiveness. Indeed, the capacity to innovate is perceived as the best answer to global competition, the needs to adapt to technological changes and to constantly produce new products, which are elements characterizing the post-Fordist production system. The capacity to constantly innovate and to absorb innovations is directly linked to the level of education of the population. Information technology is a key element when it comes to knowledge development and policy. In summary, in the EU, developing regional competitiveness depends on modernizing and diversifying the productive structure (by developing knowledge-based economic activities and innovation) once a sufficient endowment of physical infrastructure and human capital is attained. This has to be achieved respecting a horizontal condition, which consists in achieving a sustainable development in environmental terms.

Regarding of European studies about territorial competitiveness we determined the main factors: 1. Clusters; 2. Human capital; 3. Enterprise environment and networks; 4. Innovation/Regional innovation systems; 5. Governance and institutional capacity; 6. Sectoral structure and type of enterprises; 7. Infrastructure (broad understanding); 8. Typology of regions and level of integration of firms; 9. Internationalisation and nature of foreign direct investment (FDI); 10. Geographical location; 11. Attractiveness for investments.

However, there is a danger that competitiveness at a territorial level becomes a conceptual chimera. The essential problem is that territorially based actors and agencies seek to position and maintain the utility of their regions and sub-regions by reference to a set of measures and indicators that are conceptually suspect and often empirically weak. The degree to which territory compete depends on a manifold set of factors. But, our research experiences give a heading toward main factor. Moreover, a region’s most important resource is its human capital. In order for European Union to move forward and be strong, we must invest in EU, ensuring that no member of society is left behind in the knowledge-based economy. Although most people know how to read, the real question is whether their reading and writing skills

are such that they are able to meet the challenges of living and working in society and the knowledge-based economy. Globalization and new technologies have brought about profound changes in the workplace. These factors have set more demands, as well as changing and rising expectations on employees.

In the new economy, where jobs are driven by technology and information, lifelong learning is key to ensuring that EU continues to be productive, globally competitive and economically secure. The success of territories in the knowledge-based economy depends on the ability of its workforce to respond to new challenges and pursue lifelong learning opportunities.

Literacy has become an important issue for business and labour. Workplace literacy refers to the essential skills that people need at work, such as reading, writing and numeracy. It also includes critical thinking and problem solving. EU with strong literacy skills have better paying jobs and are less likely to become unemployed than those with lower literacy levels. The opportunity to use literacy skills on the job can actually help people maintain and enhance these skills, long after they have completed their formal education.

In the knowledge-based economy, territories of EU's success depend on the ability of its workforce to respond to new challenges. This is challenge that no single government can achieve alone. To achieve this goal, we must continue to work together with other governments, literacy partners, and business and labour groups, to strengthen literacy and other essential skills that are the foundation of lifelong learning.

In several project we have already manifest the influencing of human resources to development. The human potential affects to all factors of territorial and regional competitiveness. Namely, what territory would be development able which has qualified labour force. The status of human resource determines the establishment of enterprise because it needs the creative work-force. If on the labour market are located qualified employees to challenge of cognitive society the level of innovation is rise-able. But the local government has responsible control of territory or region so that the centre of decision making has necessity qualified human resources. As well, the integration of firms would be realisation on the modern territories where it can find the usable work-force. Coming of FDI also depends the human potential because this influences the attractiveness of territory.

#### **2.5.2.6. Wp4s “synthesis” progress - Group leader Csilla FILO (PTE)**

As main **Results**, we should indicate the two planned pre-syntheses were drafted during the first mid-term period to prepare final synthesis:

- The pre-synthesis regarding territory concept and territory analysis methods.
- The pre-synthesis regarding territorial information and territory competitiveness indicators

Then Wp4s drafted a global synthesis

#### **2.5.2.6.1. Comparing the territory concept and its analysis methods.**

The synthesis on the territory concept and on the territory analysis methods were fed by the follow-up of the census implemented by Emmanuelle MORANT, and then Monica MOLLO, on the research activities about territory in Europe, as well as by the follow-up of the reflexion about map and geographic information systems.

#### **The survey on research about territory in Europe**

This work aims to identify all the research groups in Europe that study the territory concept and produce scientific documents on this subject. The objective of this identification work is to understand how these studies contribute to the development of the territory concept and to draw a European map of research in this field. This work main purpose consists in identifying and planning possible scenarios of territory analysis and development

#### **Objectives**

The main purpose of this work is to make an empirical study on the “state of the art” of the territory concept, through a census about all the research / studies that are made in Europe.

The identification of the “state of the art” of the territory concept has two objectives:

- 1 The creation of a database on territory that includes all the information on the European projects available for the persons or institutions who/that intend to study "*territory*" and who/that need information.
- 2 This research also enables us to observe the evolution of the territory concept. It also helps us planning future studies on territory.

Moreover, this research contributes to the WP4 synthesis that aims to analyse the state of the methods and tools in the territory study. This last point is one of the reasons that led us to explore all the European research groups which research subject is the territory concept. Our attention focuses on the territory definition these projects produce, the methodology these groups have used in their studies and also on all the available information linked to their projects. Another important objective of this work is the development of a territory definition

that could be a sort of link and synthesis between all the research and projects that have paid attention to this concept. Therefore, these research directly impact on the territorial intelligence paradigm.

#### Methods and phases

This research started by the identification of all the European laboratories that study the territory concept. The laboratories identification depended on precise criteria: a) giving priority to the European countries, b) identifying the various kinds of research funding, c) indicating, the collaborations when possible, d) selecting projects with a theoretical approach: economic, sociological, educational science, geographical, information and communication sciences. The gathered data result from the joint work made by Emmanuelle MORANT and Dr Monica MOLLO.

#### The database

The creation of a database is a means to identify the similarities and the differences within the various studies on the territory concept that were identified.

These similarities and differences are analysed by comparing those studies, initially through the theoretical approaches and then through the concerned European countries. This data gathering is an attempt to gather the various studies on territory, and also to create a basis that can be used to plan and implement future studies.

This data gathering is an opportunity to get information on the studies development on territory for people interested in designing and leading research and studies on territory whatever his/her nationality is. The information gathered in this database especially focus on nation, major research centres, methodology and tools, territory concept produced by these studies and collaborations between laboratories. During the first phase of this work, we carried out a search on Internet about the projects linked to territory. We contacted the institutions firstly by using Internet and then directly by mail or phone.

#### Data contents

The data contents are divided into two parts:

- The frequency tables for each variable
- The cross-table with the European countries and the variables

#### The bibliography

At this stage, we explored the European and interdisciplinary bibliography produced on the territory concept. This bibliographical gathering had two purposes: 1) analysing the way the territory concept is studied; 2) in different European countries and according to

different theoretical approaches, identifying the concept development, through the analysis of the most important documents.

#### First results

The data analysis shows the territory concept is mainly designed at the universities and research centres level and the used methodology usually belongs to the exploratory kind or to the GIS one. The theoretical approaches used to solve problems linked to territory are usually economic, sociological and geographical ones. The research laboratories focus on the territory dynamics by globally analysing this concept through the social actors' policies, the economic aspects and the geographic territory. For each of these aspects, different approaches and methods are used. It seems the territory can be studied in terms of local development (that can be either social or economic) on the basis of a data analysis. Among the data, it appears the territory concept is sometimes studied from the spatial point of view (not only considered as a geographic space but also as a social one). It can be developed whilst respecting cultural identities and actors needs. The studied data also show that work on territory is often led in cooperation. These collaborations start among the main national research centres of a same country and then develop at the European scale.

#### **Map and GIS, Tools of analysis and territory management**

The interest of tools like GIS overcomes the mere cartography function. Nevertheless, they all have an essential function of spatial representation. Consequently, we chose to present here the bases of map as an analysis method of territories, before making a synthesis about the GIS specificity during the caENTI last period.

« A geographic map is a representation of a geographic space. It emphasizes this space tract, its localization in relation with the nearby spaces, as well as the localization of the elements it includes »<sup>3</sup>. There are plenty of ways to produce a map. The used tools can be basic: on the ground with a stick, on a room floor with chalk, with a pen on a mere sheet of paper; they can be very sophisticated and combine several methods of data acquisition (aerial pictures or satellites images, ground research), of data compilation, of results processing and validation.

Data processing and digital technology allow reducing much the time necessary to produce a map, but important manual phases are still necessary.

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<sup>3</sup> Source : Wikipedia

As regards what is usually called automatic cartography, it is usually limited to the execution of maps with proportional symbols or coloured-area maps, which process was designed by Charles DUPIN at the beginning of the XIXth century, that is to say the connection between geometric shapes and digital values.

The map content construction also appeals to various expert methods (example: IGN maps) or to participative methods (example: identification of the poorest families that live in a commune, SIMANOWITZ, 2000). In this case, the map is a communication support, a representation mode, a means to gather and share information.

The legend<sup>4</sup> cannot be dissociated from the map. Indeed, even if many figures have a similar or close representation in various map providers, a geographic map remains a representation for which the used graphic conventions can be adapted to the targeted lectors. Some conventions often guide the choices and, for example, it would probably be a bad idea to symbolize warm weather with blue and cold one with red.

Anyway, a map is an image and consequently it should respect the generic rules of graphic semiology (see Jacques BERTIN's works). They are rules, and not conventions. They define the possibilities given by various visual variables. The latter belong to two main categories, those that express an order (value and size) and those that express a difference (colour, shape, orientation, speck). Besides, according to the information discretisation mode we choose, the map aspect will be different. As a consequence, the got result is the representation of a message the map author expresses through his/her methodological choices.

According to D. RETAILLE and O. LOUISET, « cartography is not limited to [...] figurative representation but concerns the whole languages metaphorical representation, from the natural ones to the scientific languages » and « the motivations and localization choices » are more often located in « spontaneous geography » than in the « scientists' one ». It is a comment we should keep in mind within the framework of this programme devoted to territorial intelligence.

#### **2.5.2.6.2. Relations between territorial information and territorial competitiveness.**

Within the WP4, which is devoted to the spreading of fundamental methods and research design in territorial information analysis, the second synthesis aimed to identify and

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<sup>4</sup> For other less important reasons, the geographical map loses much interest if it does not have enough representation or scale preciseness allowing measuring the size of a real item, on the basis of a representation.

analyze territories (situation, problems and solutions) *via* territorial information available in Europe.

At the European scale, getting territorial information is made more complicated by the important number of data suppliers. Each country has its national institute and several national administrative departments, regional or paragonovernmental organizations, what increases the difficulty to spread information within the 27-country European Union. This variety of data suppliers increases the complexity of the understanding of territories and of their dynamics. The statistics gathering is also less efficient, and consequently more expensive, for users because of the numerous contact people and procedures.

In this context, competitiveness is an important part of the territories developments strategies. This proactive approach is partly based on the analysis of spatio-temporal indicators.

### **Information and Competitiveness**

#### Information (WP4i)

The first research undertaken in 2006 and 2007 concerning the European contextual indicators aimed to make an inventory of them and to characterize their accessibility. The data were analyzed at various space levels: from local entities (LAU2) to upper administrative ones (NUTS 1,2,3).

The problems were studied in the prospect of the CATALYSE method complementarities. This method allows comparing the people's needs and the services offer, whilst taking into account the socio-economic environment (caENTI, Deliverable 56). To achieve this objective, the method used three kinds of data: the data concerning the people's needs we got *via* a questionnaire, the services offer we got *via* lists and lastly the socio-economic and contextual data that describe the environment.

After having selected 15 indicators representing 20 questions of the guide, we made research on the data characteristics. They emphasized it is necessary to be careful whilst processing and representing the data. Indeed, the processing protocols are built in different ways according to the countries. The European Office for Statistics is the only organization that harmonizes its statistics for all the data.

Our research also highlighted the lack of data and their availability discontinuity among the European countries (due to their adhesion year, the data transmission or the local availability), and even within a same country. Moreover, the available indicators are not

necessarily useful or sufficient to represent the territories complexity and the people's needs in the sustainable development context.

#### Environmental indicators

The WP4i research paid great attention to the environmental indicators. This approach allowed enriching knowledge on territories, in particular on the people's living context.

Identifying the indicators necessary to characterize the environment state is particularly complex. On the one hand, there are few environmental indicators and on the other hand, within the EU27 the data availability is very varied (from a country to another one and also within a country according to the space levels).

Five indicators were chosen in EUROSTAT to study the national level: the municipal waste generated, the electricity consumption by households, the greenhouse gas emissions, the modal split of passenger transport and the built up areas

#### Competitiveness (WP4c)

Territorial competitiveness is an integrated and proactive approach that allows shaping the future of territories, regions and larger geographies. As a consequence, to some degree it can also be referred to as "spatial planning". Territorial competitiveness strategies can explore the potentials that can favour economic growth and employment. It can also support an enhanced quality of life, by helping to meet the sustainable development challenge. Observation of territorial competitiveness helps revealing vulnerability. The essential problem is that territorially based actors and agencies want to enhance and maintain their regions and sub-regions utility, by making reference to a set of measures and indicators conceptually debatable and often empirically weak. The competition degree of territories depends on a manifold factor set. Within the caENTI project framework, we gathered relevant indicators, which indicate the social changing in territories. The information must necessarily be available for spatial entities at a lower level than countries.

It statistically corresponds to the European levels from NUTS 2 to LAU 1. Our research shown that the data availability is variable, depending on the considered country and on the required year. This irrefutable fact makes complex the comparative analyzes and makes null and void any certainty about the data availability. Moreover, if there are the major indicators on EUROSTAT, others are missing or need to be calculated. The wp4i selected the indicators and themes that can be used within the HSS and by the caENTI actors. Seven

themes were suggested: Contextual data, Population, Socio-economic conditions, Employment, Housing, Health and Education.

### **Relation between wp4i and wp4c**

The cross-research between wp4i (indicators) and wp4c (competitiveness) highlighted the lack of indicators useful for local actors and the difficulties to gather data in a transnational context. The European institutions of statistics freely provide statistics, but only concerning regional data and current indicators.

The indicators are firstly based on economic factors. This over-representation of economic sight can be explained by the gathering facility (there are institutions in all the European countries) and by the methods standardisation.

It allows only getting a partial vision of territories, local conditions, resources and people's needs. This fact puts forward the need to get new indicators, both general and multi-scalar, to be used by European local actors.

In addition, the cross-activities illustrate the overlapping between competitiveness within territorial development and the cooperation obligation between indicators for evaluation and strategies.

The figures gathering emphasizes the limits of our applied work and demonstrates we have an important work to do concerning the data availability and their diversity. To achieve this work, we need to be supported by public authorities.

We should keep working on these issues by making a specific research on the data use within an indicators portal. This task will be divided into two final presentations: on the one hand, a web-mapping tool that allows mapping indicators and, on the other hand, an indicators portal that can directly be used by local actors (CATALYSE).

To achieve this goal, we must gather contextual data and format them. Whilst doing this important work, we will write a methodological note.

This working group final conclusion will specify the territorial information place and definition within the context of its use by local actors.

#### **2.5.2.6.3. Global synthesis**

In the third period of WP4 we harmonized the sub-tasks. Each subtask leader presented the report of works and research activities, then we created the deliverable 33 of caENTI: *Final scientific report of synthesis on territorial intelligence*.

This report showed the activities about territorial processing, territorial observations, and data collections and how can become the territorial information to indicators.

In this work we made to compare research actions in the territorial analysing studies in level of EU. It has been made, in a collective way, from the 1st of March 2006 to 28th February 2009, by some different university disciplines researchers belong to Observatoire de l'école rurale (OER), territorial actors of OPTIM@ Asbl (who have been involved in WP4T since the meeting happened in Salerno University, May 2007). In a scientific framework, WP4T has had, in CAENTI project, as final objective to compare territory concept with its actors, for preparing the best action to improve the area. From this point of view, it has elaborated an interdisciplinary sharing approach to analyse territory concept, using territorial intelligence tools.

This last concept, we are making, is considered here as «l'ensemble des connaissances pluridisciplinaires nécessaires pour connaître et agir sur des territoires» (GIRARDOT, 2004), and as phénomène [résultant] de l'appropriation des ressources d'un territoire (BERTACCHINI, 2004). It means, more precisely, a processus de coopération communautaire [qui met en oeuvre] une intelligence embarquée utilisant les TIC (GIRARDOT, 2008), because of its final aim, that is to make easier territorial actors involvement in sustainable development logics (BRUNDTLAND, 1987) of territories.

This wp4t concept of territory final report is organized in three points, as we can see below:

Interdisciplinary approach on territory concept (starting from internal changes between different disciplines researchers into Territoire de la CAENTI) (March 2006-May 2007) working group.

1. Compare different approaches concerning territorial problems both of research and social practises regarding CAENTI actors to achieve a concept sharing definition (considering territorial intelligence for making actions regarding sustainable development) (May 2007-March 2008). One example is the development of a sharing territorial diagnosis between researchers and actors on Chapelle-Lez-Herlaimont Territory in Wallonie Belge (actually still in the pipeline) from March 2008-May 2009.

This working group has reached its territory concept starting from the approach developed by the Observatoire de l'Ecole Rurale (OER) considering scientific studies on rural territories and the analysis of their daily migrations, home-work, (spatial segmentation

INSEE-INRA of 1996-1998) mountain areas from 600 to 800 metres high, considering some of their mountains. (French Montagne law of 1985). Territories studied by the OER don't refer only to institutional territories, that is prescribed, but mainly to action territories and those which are linked symbolically to representations, according to Bernard LAHIRE sociological typology. These territories affect school, organization, pedagogy, didactic, school results orientation. All together shared their specific knowledge and approaches on territory. To realise this project, firstly they studied other disciplines researchers work. So they crossed their approaches with geographers, sociologists and SIC researchers ones internally to the OER. WP4T has been surely stimulating by both OER researchers and UNISA group ideas and also by researchers ideas from other European Countries, belonging to CAENTI project. During Ecole et Contextes Territoriaux et Socioculturels (ECTS) seminar, of UMR Apprentissages, Didactiques, Evaluation, Formation (ADEF), directed by Alain LEGARDEZ, we made some exchanges and scientific discussions on this question. Pierre CHAMPOLLION conducted many sections of this seminar, concerning territory question.

UNISA group elaborated its reflections and reports in two international conferences directed by Natale AMMATURO and with Giovanna TRUDA as collaborator:

- Intelligenze territoriali, identità regionali e sviluppo sostenibile, May 2007
- Comparazione tra sistemi educativi europei , May 2008

2. Elaboration of an update international state of art on territory concept (with an update European bibliography and one up-to-date European list of research laboratories on this subject (March 2007-August 2008).

Different researchers, belonging to different subjects (geography, sociology and education science) and from different Countries (France and Belgium) as well as different territorial actors have arranged for a better prospective regards territory construction, pay attention to MOINE and DAUMAS scientific reflections, so territory has been analysed in its temporary dimension, and looking at the future, thought as common resource. Afterward this two partners joined both in Liège (October 2007) and in Lyon (January 2008) local researchers (SEGEFA geographers and local sociologies in Liège, education territorial actors in Lyon). Structured by Pierre CHAMPOLLION and Alain LEGARDEZ, approved by territorial actors, this sharing approach presents a complex system with many dimensions. This collective reflection developed in WP4T framework by OPTIM@ and OER social actors and the researchers of different academic disciplines of OER, based on a shared vision of the

territory and an initial remark of OPTIM@, led progressively the two partners to plan a common action process, and to the territorial social development of the intelligence territorial. This result would not be actually possible without the preliminary common work on the territory. The territorial diagnostic is caring out between March 2008 and June 2009. It is focus on the Municipality of Chapelle-lez-Herlaimont, small village in the south of Wallonie.

3. Compare different approaches concerning territorial problems both of research and social practises regarding CAENTI actors to achieve a concept sharing definition (considering territorial intelligence for making actions regarding sustainable development) (May 2007-March 2008).

To elaborate territory concept state of art in WP4T, starting from May 2008 Monica MOLLO, (graduate student) has been added to Italian group, to finish our work with Emmanuelle MORANT of UFC (graduate student) as collaborator. The difficulties we found as regards the picking information up on laboratories and departments concerning territories in Europe, created the impossibility to make a WP4T intermediate report in 2007 at the prefixed date.

This research is located upstream of WP4T work is in charge of the design and dissemination of territorial methods and tools accessible to the territorial actors. This report aimed to present an analysis on the data collected in recent months on the "concept of territorial and territorial intelligence." This research work could be summed up in four phases of work that had the same thread analyze how the concept of territory has been studied over the years, the first to the latest research, the main theoretical perspectives and methodologies used and in particular to now, the concept of territory that those searches have produced.

Finally in this sub-task, the analysis work could be summarized in five phases, which are aimed to analyze: 1) how the concept of territory has been studied over the years, from the first to research 2) the main theoretical perspectives have studied the territory 2) the methodology used in these studies; 3) the concept of territory that those searches have produced 4) the bibliography produced.

In additional within WP4 we created our conception of territory. In which we consider the territory is a system, it endorses the set of properties attached to complex systems [Moine, 2006], referring to structure and dynamics, putting forward the question of time irreversibility and its necessary to be taken into account. This system is composed of two absolutely in dissociable subsystems, which on the one hand are the actors, joined together by their mutual

plays leading to the use, the installation and the management of a second subsystem i.e. the geographical space, composed of places and objects, which interact according to their localization and especially to amenities means and constraints offered to actors by them.

The WP4M Method gave a direction about the territorial spatial. An observation is defined as observing action, to consider with a followed attention, the nature, the man, the company in order to know it better. This definition takes all its direction, if we refer to the specific territories question, bearing in mind the studied system complexity. The observation integrates the time and irreversibility concept, it thus acts to observe in the phenomena duration characterized by their evolutionarily [Casanova, 2008]. However, these phenomena must be described with precision in manner to give an account of their evolution with exactitude and without ambiguity. When speaking about complex systems, whose behaviour is particularly unforeseeable, the case of the socio-space systems, the observation must rest on reliable data describing these systems in a consensual way. The observation consists to throw a glance related in a durable way to a given system, described by a set of raw data, which can be combined in order to produce indicators divided by the community. The last ones are synthetic information, fruit of choice and interpretations. Moreover, this carries ahead the indicators question, allowing beginning from multiple and varied data, to represent the use consequences, the geographical space adjustment and the management by the men. The indicators concern several different logics, describing either the state of the system (diagnosis), or the impact on installation policies (evaluation), or possible system evolutions (futurology). In addition, according to their organization with the centre of observation tools, they will make it possible either the approach of themes sets (population, housing, employment, etc), or of issues, those being located at the interface between various themes sets (precariousness for example). Lastly, the observation implies a double information division, upstream the observatory supply, in order to exploit it downstream in a rational way. The data and indicators will influence the perception on the observed systems, and by the fact they will condition our glance and our selective attention. Here, an important feedback loop, binds the perception and the observation. Thus, this replaces the observation tools in the middle of actors systems in tension, within a given territory, i.e. in the middle of governance.

In a context of assimilation of the observation to the coproduction of data on the territory, it is essential to reconsider the concept of indicator, this last being in the centre of the step observation.

Thus, the indicator concept would underlie the objectivity. This brings back for us to the descriptive dimension observation, which objectives are to restore as most objective as possible the reality. An indicator is shown as an indicating variable, significant one state even an evolution (rate of variation for example) on a level of given perception and which interpretation is generally done referring to standards or comparisons. It lies within the space scope and temporal scales defined, adapted to the objectives whom it must answer. Thus, an indicator generally refers to zonings and observation frequencies, which can be different according to observers. It is essential to think about the relevance of the indicators according to the scales of concerned analysis. This last remark brings us to the questions of type: “who observes, what and on which time and space scale levels?”, given that that the indicators produced on the agglomeration level can only be complementary to those produced by an area. On the states synthetisation basis, however indicators can answer various objectives, diagnosis with the evaluation and the futurology.

The indicator takes all its direction within the observatories framework which, by definition, allows to interact and to integrate multiple sources data [of Sède et al., 2008]. Its relevance, its synthesis qualities as well as the potential of evaluation which they conceal are a function of the level and the collaboration quality developed by tests brought together around the observatory projects.

It follows the work in WP4I information, where the participant analyzed the data processing and territorial indicators on level of EU and visualisation of this information. Data can also be gathered from territorial observatories or studies. These observatories are the most often public and work on territorial development. They gather territorial statistics for a defined territory, process and map the results. They are resource centres for other territorial actors. The WP4I group established the local accessibility of these indicators for each of the EU states. A table in the Deliverable 53 showing these indicators are not always available at the local level. Divisions by statistical sectors are very heterogeneous according to the countries and depend on different procedures of cuttings, which make the comparisons difficult, in particular because of the structural differences related to the representativeness of the populations included in each sector. Certain countries choose cuttings so that each zone contains a similar number of inhabitants, whereas other countries define following cuttings the morphology of urban zones. The data concerning these cuttings are rarely easy to access. The communal level seems to be the basic level for which the majority of the European countries have statistics on the various indicators. The definition of the communes through the

countries of the European Union seems to be compatible with the research of a basic level, although this one is not perfect.

This basic level should not make forget that only a majority of the actors, in particular those which work on a city or district scale certain even, need finer data than those on a communal scale to highlight in a relevant way of dynamic, disparities or priority areas of actions.

Data mapping can appear nonrelevant for a certain number of territorial indicators. In these cases, a representation in the form of graph (bars, curves...) is often better. We can distinguish among the cases where the cartography is not adapted:

- data where the number of entity compared is too weak to make useful a cartographic representation;
- data where the differences of the compared values are too weak taking into consideration type of indicator to authorize an optimal reading of the results;

Different treatments and comparison protocols of territorial indicators are used by the actors as situations and contexts can be very different. Some general statements can be done about the mode of representation of the territorial indicators. The map is not always the best way to show the relevant information.

In brief, the indicators are virtually infinite: innumerable elements can be highlighted thanks to the construction of indicators based on population statistics. Their role is to give an account of a situation and to simplify the information by synthesizing it, by allowing a better communication and by authorizing cartographic comparisons. The guides treating the indicators underlines that those have to show the facts, and not to be an end in itself (VERMEYLEN, 2006). The selection operated in the indicators within the framework of the CAENTI project meets these objectives while taking into account the indicators flexibility constraints, their ability to be transposable, to adapt themselves to the inconsistencies and lacks of the data at the European level.

As highlighted (cfr. infra), the cartographic representation of the indicators needs a relevant territorial scale to spatialize the collected data. It is important to recall that the great diversity of the actors being able to use the method CATALYSE inevitably makes the search for a relevant territory particularly complex.

The relevant territories can have different sizes and structures according to the type of actor to which one addresses oneself. Certain associations using the method CATALYSE deal with restricted districts whereas others work with the national or regional scales. It is obvious

that their territories are different and that consequently the scale of represented indicators is also strongly variable.

Moreover, each relevant territory for an actor will require a higher reference level allowing the comparisons for example with the regional, national or European levels.

But it needs to compare the territories because the successful development is indispensable in the knowledge base society. Therefore in the WP4C Competitiveness research group initiated the collect of indicators of territorial competitiveness. The starting point was the determining of factors of competitiveness in the workgroup. After we defined the factors, what influences the territorial competitiveness. That is next: - Education & the Workforce (- level of qualification of the region's population, - supply and quality of institutions for human resource development in the region, - activity of labour market policy, - rate of employment), - Quality of Life & Social Capital (- access to cultural services and the nature of consumer habits, - quality of social care and services, - level of healthcare and its infrastructure, - quality of recreational facilities, - quality of settlement environment), - Research & Development ( - regional research activity ), - Technology & Innovation, - Transportation & Infrastructure, - Enterprise & Investment, - Business Climate. From the factors we initiated the set of the indicators, what needs to territorial developments.

<b>Indicators</b>
<p><i>Income level</i></p> <ul style="list-style-type: none"> <li>- Volume of taxable incomes per one tax-payer</li> <li>- Gross income serving as the basis of the personal income tax, per permanent population</li> <li>- Earnings from main activity/number of tax-payers</li> <li>- Entrepreneurial income/ number of tax-payers</li> <li>- Gross Value Added (GVA) per capita</li> </ul>
<p><i>Labour productivity</i></p> <ul style="list-style-type: none"> <li>- Gross Value Added per employer</li> <li>- Gross income serving as the basis of the personal income tax, per tax-payers</li> <li>- Profit before taxes per employer</li> </ul>
<p><i>Employment</i></p> <ul style="list-style-type: none"> <li>- Employment rate</li> <li>- Unemployment rate</li> <li>- Number of tax-payers per 1000 inhabitants</li> </ul>
<p><i>Global integration</i></p> <ul style="list-style-type: none"> <li>- Income from export per inhabitants</li> <li>- Integration of the trade</li> <li>- Number of foreign tourism nights at public accommodation establishments per 1000 inhabitants</li> <li>- Number of domestic tourism nights at public accommodation establishments per 1000 inhabitants</li> </ul>
<p><i>Research and technological development</i></p> <ul style="list-style-type: none"> <li>- Number of patents between 2000 and 2004 per 10000 inhabitants</li> <li>- Number of members of public body of Hungarian Academy of Sciences per 10000 inhabitants</li> <li>- R&amp;D units per 100000 inhabitants</li> <li>- Number of scientists and engineers per 1000 inhabitants</li> <li>- Current R&amp;D expenditures per 10000 inhabitants</li> <li>- R&amp;D expenditures per 10000 inhabitants</li> <li>- Capital R&amp;D expenditures per 10000 inhabitants</li> </ul>

<p><i>Small and medium-sized enterprises (SME-s)</i></p> <ul style="list-style-type: none"> <li>- Number of active companies and partnerships per 1000 inhabitants</li> <li>- Number of active small businesses (10-49 employers) per 1000 inhabitants</li> <li>- Number of active corporations with legal entity per 1000 inhabitants</li> <li>- Number of active small businesses (10-49 employers) with legal entity per 1000 inhabitants</li> <li>- Proportion of partnerships from the active enterprises</li> <li>- Owners' equity of the companies per 1000 inhabitants</li> <li>- Subscribed capital of the companies per 1000 inhabitants</li> <li>- Balance sheet total of the companies per 1000 inhabitants</li> </ul>
<p><i>Foreign Direct Investment</i></p> <ul style="list-style-type: none"> <li>- Staff number of enterprises with foreign direct investment per 1000 inhabitants</li> <li>- Owners' equity of enterprises with foreign direct investment per 1000 inhabitants</li> <li>- Foreign direct investment per inhabitant</li> <li>- Net revenue of enterprises with foreign direct investment per 1 inhabitant</li> </ul>
<p><i>Infrastructure and human capital</i></p> <ul style="list-style-type: none"> <li>- Number of university or college graduate employed per 1000 inhabitants</li> <li>- Proportion of leading intellectual employees from the employees</li> <li>- 18-X years old population, with at least secondary school general certificate, as a percentage of the same age group</li> <li>- 25-X years old population, with university, high school, etc. diploma, as a percentage of the same age group</li> <li>- Telephone main lines per 1000 inhabitants</li> <li>- ISDN-lines per 1000 inhabitants</li> <li>- Number of dwellings built per 1000 inhabitants</li> <li>- Number of building permits per 1000 inhabitants</li> </ul>
<p><i>Institutions and social capital</i></p> <ul style="list-style-type: none"> <li>- Proportion of disability pensioners below retirement age from the 45-59 years old population</li> <li>- Annual average internal net migration per 1000 inhabitants, 2000-2004</li> <li>- Number of pensioners, retirement provisioners per 1000 inhabitants</li> <li>- Active non-profit institutions per 1000 inhabitants</li> <li>- Full-time students of higher educational institutions per 1000 inhabitants</li> </ul>
<p><i>Economic structure</i></p> <ul style="list-style-type: none"> <li>- Proportion of active companies in real estate, renting and business activities from all active companies</li> <li>- Proportion of employees in agriculture from all employees</li> <li>- Proportion of employees in services from all employees</li> <li>- Proportion of non-manual workers from all employees</li> </ul>
<p><i>Innovative activity</i></p> <ul style="list-style-type: none"> <li>- Registered users of work-place, tertiary educational and other libraries per 1000 inhabitants</li> <li>- Number of lecturers of higher education institutions (by seat of institutions)</li> <li>- Number of lecturers of higher education institutions (by sections placed out)</li> </ul>
<p><i>Regional accessibility</i></p> <ul style="list-style-type: none"> <li>- Complex regional accessibility indicator</li> <li>- Domestic supplier accessibility indicator</li> <li>- Multi accessibility indicator</li> </ul>
<p><i>Skills of work force</i></p> <ul style="list-style-type: none"> <li>- Employees working at the residence with at least secondary school general certificate per 1000 inhabitant</li> <li>- Employees working at the residence with university, high school, etc. diploma per 1000 inhabitants</li> <li>- Average number of school grades</li> </ul>
<p><i>Social structure</i></p> <ul style="list-style-type: none"> <li>- Population aged 60 and over as percent</li> <li>- Population aged 0-18 as percentage of permanent population</li> <li>- Live births/deaths</li> <li>- Vitality index</li> <li>- Number of single person households per 1000 inhabitants</li> <li>- Share of inhabitants living in settlements with population density over 120</li> <li>- Proportion of central settlement's inhabitants from the sub-region's inhabitants</li> </ul>
<p><i>Decision centres</i></p> <ul style="list-style-type: none"> <li>- Number of active small and medium size corporations with legal entity</li> <li>- The sum of the company's owner's equity in the sub-region</li> </ul>
<p><i>Environment</i></p> <ul style="list-style-type: none"> <li>- Number of discovered publicly indicted crimes</li> <li>- Number of economy related discovered publicly indicted crimes</li> <li>- Number of general practitioners per 1000 inhabitants</li> <li>- Number of places of clubs for the aged providing day-time care per 1000 inhabitants aged 60 and over</li> </ul>

*Regional identity*

- Arrivals per 1000 inhabitants
- Departures per 1000 inhabitants
- Proportion of employees working at residence from the daily commuters
- Proportion of intellectual employees working at the residence from the daily commuter intellectual employees
- Promotion of daily arrival commuters from the daily departure commuters

We started the WP4 program in 2006. On the Kick off Meeting in Besancon we organised the participants of “The spreading of fundamental methods and research design in territorial information analysis within the Humanities and Social Sciences” workpackage. In the first term we defined some scientific questions in each sub-task. According this we worked the first deliverables which it was documented the stat of the arts. This “State of the Arts” was presented on 1. Annual International Conference Territorial Intelligence Regional, Identity and Sustainable Development in Alba Iulia (Romania). The sub-task leaders meet on more and more coordination seminar where it was confrontation more scientific viewpoints. The universities presented them research action of spatial analysis about territories. The most important task was created the definition about territory and territorial process by University of Salerno. Beside the WP4M [Method] workgroup (University of Franche-Comté) widened the concept of territorial processing with economical, environmental and human development processes. In additional the WP4I [Information] group (University of Liege) collected the indicators what needs to research action and they gave a data inventory for territorial actors. This information also appeared the WP6 “Conception and dissemination of methods and tools of territorial intelligence accessible for the territorial actors and respectful of a sustainable development ethics”. Therefore in 2007 the WP4I and WP4 [Competitiveness] groups created the WP6I sub-task where the participants cooperated the WP6. In WP4I the contributors described the data processing and data mapping. In this work the main partner was the Scientific Research Centre of the Slovenian Academy of Sciences and Arts. They gave a geographical frame to works and the participants assigned some indicators what indicate the territorial development. It shows on territorial-intelligence web site. Cooperating with WP4I the WP4C [Competitiveness] (University of Pécs) defined the factors of territorial competitiveness. The Wp4P [Project] (University of Franche-Comté) coordination group selected 45 projects using relevant key-words for territorial intelligence and crossing several research modes: by studying repertories and databases but also by making direct requests on Internet. These projects essentially concern the social and environmental impact of the research supported by the European Union and some projects about social exclusion. Only five projects can still be contacted. However, they do not all claim being territorial

intelligence projects and they are essentially research projects, which cannot be compared with the CAENTI actors, for the occasion of a seminar, as we basically expected it. The General Directions of the European Commission do not have information and do not fund relevant projects in the territorial intelligence field, except the information and projects that are published on the European Union official website. According to these observations, the Wp4p coordination group suggested a new orientation of research activities about the territorial intelligence uses, which came true with the suggestion of a new coordination group, the so-called wp6u, during the Territorial Intelligence International Conference of HUELVA in October 2007. In 2007 the main task was the reports about sub-task. Each sub-task leader presented the reports on 2. Annual International Conference Territorial Intelligence and Governance. Participative action-research and governance applied to territorial development in Huelva. After second conference we reorganized the sub-tasks and from WP4M and WP4T groups became to WP6T group and from WP4I and WP4C transformed to WP6I [Internet portal] group. In 2008 we started the WP4S [Synthesis] (University of Pécs) program. The first task was evaluation of reports on second coordination meeting in Pécs. On this meeting we also prepared the next annual international conference. In mid of 2008 we have ready the all documents of WP4 and these gave a direction to report of synthesis. The last task was in the workpackage the preparing of 3. Annual International Conference Tools and methods of Territorial intelligence in Besancon where we presented our research actions. Besides we used the CooSpace preparing of meeting and loaded up more and more documents.

### **2.5.3. Workpackage 4 “Methods” deviation from the project workprogramme**

According to the observations, the Wp4p coordination group suggested a new orientation of research activities about the territorial intelligence uses, which came true with the suggestion of a new coordination group, the so-called wp6u.

### **2.5.4. List of drafted documents and next deliverables of workpackage 4 “Methods”**

#### **2.5.4.1. Drafted documents**

Miedes Ugarte B., Sánchez López C. Territorial information, labour market and territorial competitiveness. Local Employment Observatory of Huelva University.

Ács Péter, Territorial and social research actions and info-communication tools, University of Pécs.

Moreno Moreno A., Pérez Morales G., Local labour market delimitation: Analysis of an algorithm of regionalization, Local Employment Observatory of Huelva University.

Breuer C., Devillet G., Participative construction of a territorial strategy: Strategic planning of action for the districts of Huy and Waremme analyzes. SEGEFA, Université de Liege.

Natale A., Globalizzazione e nuovi processi di sviluppo regionali - Globalization and new regional processes of development, Università di Salerno.

Kékkő O., Micro regionals social processes in sustainable development, University of Pécs.

Béres Csaba Z., E-government services and the 5th level of CLBPS, CCSOft.

Póla, P., Regional competitiveness and local development, Centre for Regional Studies of Hungarian Academy of Science, Transdanubian Research Institute.

Koltai Z., Competitiveness of Hungarian cities, University of Pécs.

Ormaux S., The methods of territorial intelligence, Université de Franche-Comté.

Devillet G., Information and indicators of territorial research actions, University of Liege.

Champollion P., The territorial process and territorialisation, Observatoire de l'école rurale et University of Salerno.

Filó C., Indicators of territorial competitiveness and the territorial intelligence, University of Pécs.

#### **2.5.4.2. Deliverables**

Del. n°	Deliverable name	WP n°	Date due	Delivery date	Estim. P/M	Used P/M	Lead contractor
23	State-of-the-art about fundamental methods and tools of spatial analysis and of processing of territorial information within the social sciences and humanities.	4	10	10	6	9	UFC
24	State-of-the-art about the territorial information available on Internet and in the European sources.	4	10	10	5	6	ULG
25	State-of-the-art about the EC projects and the GDs information.	4	10	10	5	4,4	UFC
26	State-of-the-art about the territory concept and the territorialisation process.	4	10	10	5	5,5	UNISA
27	State-of-the-art about the territory competitiveness concept.	4	10	10	5	7	PTE
28	Inventory of fundamental methods and tools of spatial analysis and of processing of territorial information within the social sciences and humanities in Europe.	4	22	22	6	6,85	UFC
29	Reasoned catalogue of territorial information available on internet and sources in Europe.	4	22	22	5	5,26	ULG
30	Report of evaluation on EC relevant projects and DG's information.	4	22	22	7	2	UFC
31	Report about the concept of territory and the process of "territorialisation".	4	22	22	5	3	UNISA
32	Report about the notion of competitiveness of territory.	4	22	22	6	4,2	PTE
33	Final scientific report of synthesis on territorial intelligence.	4	36	36	8	14,5	PTE
					63	64,71	

### 2.5.5. The workpackage 4 "Methods" specific prospects

The WP4 produced a set of réflexions that will be followed after caENTI because the relations created between the teams and the researchers has become perennial.

The “Methods” workpackage also produced transfers that are already promising:

- - The European database of the research teams on territory will be analysed and put online on the basis of an actio led by the laboratory Théma of the Université de Franche-Comté, in cooperation with the Università di Salerno. An international widening on the website [territoiresnet.org](http://territoiresnet.org) has also been initiated with the Latin-American network [territorios.org](http://territorios.org).
- The European webmapping of the territorial indicators is also a project that will continue under two shapes : with the adding of new indicators, better adapted to sustainable development on the one hand and with regional experiences at the infra-communal level on the other hand.
- Lastly, the specifications for an online repertory of the territorial intelligence actors and a development project were made within the wp6u framework.

After caENTI project the participant will prepare a new MASTER degree “Territorial Intelligence” with 5 European University as university of Franche-Comté (France), University of Huelva (Spain), University of Salerno (Italy) University of Liege (Belgium), University of Pécs (Hungary). In these studies, we would like to give a new European perspective about territorial science in particular the global analysis method, data processing, new indicators and web-mapping. We think it needs for next generation in knowledgebase society and sustainable development. The global trend in the spatial analysis is the complex regarding and the researchers, territorial actors and experts consider the scientific diagnosis as a normative direction.

So in 2009 we continue our research actions within European Network of Territorial Intelligence and we spread the activities of researchers and dissemination of methods.

In 2009 we will give a new perspective to territorial intelligence because in Salerno we will organize a conference about “Territorial intelligence and culture of development”. The cultural aspect is very important factor of territorial process. The quality of the human environment is indispensable in a regional development process. The exploration of this examination, the qualification of the people and living on the area and the development opportunities is necessary for an area's traditions because of this. We would like to if this conference would be attached to the conference to be organized by University of Pécs in 2001, Pécs host the European Cultural Capital programs, where a preference is constituted the cultural processes.

**2.6. Work package 5 [Governance principles] Analysis of the application of the principles of governance of sustainable development in territorial action-research. Workpackage leader: Blanca Miedes Ugarte, University of Huelva**

**2.6.1. Workpackage 5 “Governance” objectives, work starting point and organization**

**2.6.1.1. Objectives of the WP**

The caENTI WP5 *Analysis of the application of the governance principles of sustainable development to territorial action-research* main general objective consists in deliberating on ethical and methodological principles that should be respected by research protocols of humanities and social sciences, so that the research results favour territorial governance and therefore the territories sustainable development.

The main deliverable linked to this work was the elaboration of a *European quality letter of research action favouring territorial governance of sustainable development (Deliverable 47)* in 2007. This work was made by taking as a starting point the document, *Application of the governance principles of sustainable development to territorial action-research (Deliverable 40)* which was elaborated during the first period.

From the beginning of 2008 until March 2009, the WP focused on the *practical aspects of the application of the principles of the quality letter*, in particular those regarding the *information and communication technologies* use in the action-research processes.

Therefore, systematic efforts were made in order to achieve the following goals:

- Regarding action-research processes that contribute to sustainable territorial development:

1) To identify the governance principles of sustainable territorial development and to specify the impacts, potentialities, risks and limiting factors of their implementation. During this phase, the WP designed the reference framework of the other WP5 phases.

- Concerning action-research activities:

2) To ensure, through a European suitable Quality letter, ethical and methodological principles and conditions to be respected in the development of research projects. Thus, they should efficiently contribute -through their impact on governance- to generate sustainable territorial development dynamic and to identify the way those principles constrain action-research, in terms of processes, tools and results.

3) To define the role of technological developments encouraging the practical implementation of the research participative-cooperative principles.

#### **2.6.1.2. Work starting point**

During the first phase of the project, the WP5 elaborated the document *Application of the governance principles of sustainable development to territorial action-research* (deliverable 40). This deliverable is based on the auto-assessment of the research processes of the caENTI members and on a debate about the principles that should inspire the research activity practices, so that they will really contribute to the governance development. In order to contextualise this debate, the group set itself the initial objective of reaching a consensus on a fundamental conceptual framework concerning the ideas of territorial governance, sustainable development, territorial intelligence and, given the importance of this approach for all the participants, of the *action-research* concept.

Based on the conclusions of this initial work, during the following period the debate became deeper and the group started drawing up action-research protocols inspired by these principles. The result of this debate was the *CAENTI Quality Letter on Action-Research Favours Territorial Governance of Sustainable Development* (deliverable 47). This work was presented and debated during the International Conference of Territorial Intelligence in Huelva in October 2007 with successful results.

During the caENTI last reporting period, the group focused on the practical aspects of the application of the Quality Letter principles, and in particular on those regarding the information and communication technologies use in the research processes performed within the WP6 framework. The group also dealt with the elaboration of the *Catalogue of participative action-research methodologies, especially those suitable to be applied to territorial intelligence development projects* (deliverable 48), the *Catalogue of technological tools, especially those suitable to be applied to territorial intelligence development projects* (deliverable 49) and the elaboration of a Video: “*Research is at territories intelligence service.*” These three works were debated during the international conference of Territorial Intelligence of Besançon in October 2008.

During the caENTI last six months, the WP5 work focused on the elaboration of the final version of the video. This document articulates the work of the WP5 and WP6 (WP6u) and it presents the uses of the caENTI tools by the caENTI actors. It is subtitled in English and French (deliverable 50).

**2.6.1.3. Organisation of the coordination activities in the WP**

Participant	Name	(p/m)	ACTIVITIES
UHU	Blanca MIEDES UGARTE	6,5	<ul style="list-style-type: none"> <li>- Organization 1<sup>st</sup> Scientific Coordination Meeting WP5.</li> <li>- Attendance 1<sup>st</sup> Scientific Coordination Meeting WP5.</li> <li>- Elaboration 2 communications for 1<sup>st</sup> Steering Committee Meeting WP5, available in Coospace WP5 Scene.</li> <li>- Coospace Scene WP5 Activation.</li> <li>- Coordination CAENTI-OLE.</li> <li>- Elaboration internal draft report OLE for WP5.</li> <li>- Analysis drafts-reports WP5 for Alba-Iulia Conference.</li> <li>- Coospace Scene WP5 maintenance.</li> <li>- Preparing the presentation: Workshop CAENTI WP5 Governance Principles Synthesis of a catalogue of experiences. Presentation of the WP5 during Alba Iulia Conference.</li> <li>- Attendance International Conference of Territorial Intelligence, Alba Iulia.</li> <li>- Preparing WP5 Mid-term Activities Report.</li> <li>- Final version Catalogue of Experiences OLE.</li> </ul>
	María José ASENSIO COTO	3,5	<ul style="list-style-type: none"> <li>- Revision Final Version Catalogues of Experiences UNISA, UAB, UFC, ULG, PTE</li> <li>- Organization 2<sup>nd</sup> Scientific Coordination Meeting WP5 in Liège, January, 19th-20th.</li> <li>- Preparing the working-papers: OLE CATALOGUE and WP5 2007 ORGANIZATION presented in Liège meeting and available on the Coospace WP5 Scene.</li> <li>- Preparing the final version of the paper synthesis of Alba Iulia WP5 Work Shop "WP5-Governance: analysis of the application of the governance principles of sustainable development to territorial action-research" submitted for Alba Iulia Proceedings.</li> </ul>
	Manuela DE PAZ BAÑEZ	3	<ul style="list-style-type: none"> <li>- Elaboration the Deliverable 40 (WP5).</li> <li>- Attendance of the 2<sup>nd</sup> Scientific Coordination Meeting of the WP5 in Liège, January, 19<sup>th</sup> and 20<sup>th</sup>.</li> <li>- Organization of the WP5 3<sup>rd</sup> Scientific Coordination Meeting (April, 13<sup>th</sup> and 14<sup>th</sup> 2007 Madrid)</li> <li>- Elaboration of 2 communications for the WP5 3<sup>rd</sup> Steering Committee Meeting (Madrid)</li> <li>- Attendance of the WP5 3<sup>rd</sup> Scientific Coordination Meeting (Madrid)</li> <li>- Organization of the WP5 4<sup>th</sup> Scientific Coordination Meeting (September, 28<sup>th</sup> and 29<sup>th</sup> 2007 in Huelva)</li> <li>- Attendance of the WP5 4<sup>th</sup> Scientific Coordination Meeting (September, 28<sup>th</sup> and 29<sup>th</sup> 2007 in Huelva)</li> <li>- Analysis drafts-reports on the WP5 Quality Letter for Huelva Conference</li> <li>- Elaboration of the Quality Letter.</li> <li>- Validation process of the Quality Letter.</li> <li>- Elaboration of an evaluation tool connected to the Quality Letter</li> </ul>

	Dolores REDONDO TORONJO	3	<ul style="list-style-type: none"> <li>- Elaboration of the deliverable 42 (Joint activity Valdocco-OLE-Accem)</li> <li>- Organization of Annual International Conference specifically devoted to WP5: "Territorial Intelligence and Governance", Huelva 2007.</li> <li>- Organization of the WP5 workshops during the International Conference of Huelva.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Huelva.</li> <li>- Edition of the conference of Huelva preceedings.</li> <li>- Coordination and writing of the Deliverable 47 (WP5 second year)</li> <li>- Organization of the WP5 5<sup>th</sup> Scientific Coordination Meeting held in Huelva June, 13<sup>th</sup> and 14<sup>th</sup> 2008.</li> <li>- Attendance of the 5<sup>th</sup> Scientific Coordination Meeting held in Huelva June, 13<sup>th</sup> and 14<sup>th</sup> 2008.</li> <li>- Coordination of the Catalogue of participative action-research methodologies, especially those suitable to be applied to territorial intelligence development projects (D48)</li> <li>- Coordination of the Catalogue of technological tools, especially those suitable to be applied to territorial intelligence development projects (D49)</li> <li>- Elaboration of storyboard of the Video: "Research is at territories intelligence service (D50)."</li> <li>- Organization of the WP5 workshops for the International Conference of Territorial Intelligence in Besançon.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Besançon.</li> <li>- Video interviews organization and recording and gathering of materials.</li> <li>- Coordination CAENTI-OLE</li> <li>- Coordination of Workpackage WP5 general issues</li> <li>- Coordination of WP5 with WP6u and WP4s.</li> <li>- Organization of the First drafting seminar (26-28/01/09 in Huelva).</li> <li>- Attendance to the Second drafting seminar (16-18/01/10 in Besançon)</li> </ul>
	María de la O BARROSO GONZÁLEZ	1	
UFC	Robert DAMIEN	1	<ul style="list-style-type: none"> <li>- Attendance of the WP5 1<sup>st</sup> Scientific Coordination Meeting.</li> <li>- Elaboration of the WP5 UFC internal draft report.</li> <li>- Coospace Scene WP5 maintenance.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Alba Iulia.</li> <li>- Final version of the Catalogue of Experiences UFC.</li> <li>- Preparation of the working-paper: UFC Catalogue presented during Liège meeting and available on the WP5 Coospace Scene.</li> <li>- Revision of the the final version of the paper synthesis of Alba Iulia WP5 Workshop "WP5-Governance: analysis of the application of the governance principles of sustainable development to territorial action-research" submitted for Alba Iulia Proceedings.</li> <li>- Attendance of the WP5 2<sup>nd</sup> Scientific Coordination Meeting in Liège, January, 19<sup>th</sup> and 20<sup>th</sup>.</li> <li>- Attendance of the WP5 3<sup>rd</sup> Scientific Coordination Meeting (April, 13<sup>th</sup> and 14<sup>th</sup> 2007, Madrid)</li> <li>- Attendance of the WP5 4<sup>th</sup> Scientific Coordination Meeting (September, 28<sup>th</sup> and 29<sup>th</sup> 2007 in Huelva)</li> <li>- Elaboration of the Quality Letter</li> <li>- Process of validation of the Quality Letter.</li> <li>- Elaboration of a evaluation tool connected to the Quality Letter</li> <li>- Organization of the WP5 workshops during the International Conference of Huelva.</li> <li>- Attendance of the International Conference of Territorial</li> </ul>
	Laurent AMIOTTE-SUCHET	2	
	Alain BIHR	0,5	

	Luc GRUSON	0,5	<ul style="list-style-type: none"> <li>- Intelligence of Huelva.</li> <li>- Attendance of the WP5 5<sup>th</sup> Scientific Coordination Meeting held in Huelva June, 13<sup>th</sup> and 14<sup>th</sup> 2008.</li> <li>- Participation to the elaboration of the storyboard of the Video: “Research is at territories intelligence service (D50).”</li> <li>- Elaboration of the Catalogue of technological tools, especially those suitable to be applied to territorial intelligence development projects (D49)</li> <li>- Organization of the WP5 workshops for the International Conference of Territorial Intelligence in Besançon.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Besançon.</li> <li>- Video interviews organization and recording and gathering of materials.</li> </ul>
	Thierry WENDLING	0,5	
ULG	Serge SCHMITZ	4	<ul style="list-style-type: none"> <li>- Attendance of the WP5 Scientific Coordination Meeting.</li> <li>- Elaboration of the internal draft report ULG for WP5.</li> <li>- Coospace Scene WP5 maintenance.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Alba Iulia.</li> <li>- Final version of the Catalogue of Experiences ULG.</li> <li>- Organization of the WP5 2<sup>nd</sup> Scientific Coordination Meeting in Liège, January, 19th-20th.</li> <li>- Preparation of the working-paper: ULG Catalogue, presented during Liège meeting and available on Coospace WP5 Scene.</li> <li>- Attendance of the WP5 2<sup>nd</sup> Scientific Coordination Meeting in Liège, January, 19th-20th.</li> <li>- Attendance of the WP5 4<sup>th</sup> Scientific Coordination Meeting (September, 28<sup>th</sup> and 29<sup>th</sup> 2007 in Huelva)</li> <li>- Analysis drafts-reports on WP5 Quality Letter for Huelva Conference</li> <li>- Elaboration of the Quality Letter.</li> <li>- Process of validation of the Quality Letter.</li> <li>- Organization of WP5 workshops for the International Conference in Huelva.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Huelva.</li> <li>- Attendance of the WP5 5<sup>th</sup> Scientific Coordination Meeting held in Huelva June, 13<sup>th</sup> and 14<sup>th</sup> 2008.</li> <li>- Elaboration of the Catalogue of participative action-research methodologies, especially those suitable to be applied to territorial intelligence development projects (D48)</li> <li>- Organization of the WP5 workshops for the International Conference of Territorial Intelligence in Besançon.</li> </ul>
PTE	Csilla FILO	3,5	<ul style="list-style-type: none"> <li>- Attendance 1<sup>o</sup> Scientific Coordination Meeting WP5.</li> <li>- Elaboration internal draft report PTE for WP5.</li> <li>- Coospace Scene WP5 maintenance.</li> <li>- Attendance International Conference of Territorial Intelligence, Alba Iulia.</li> <li>- Attendance 2<sup>o</sup> Scientific Coordination Meeting WP5 in Liège, January, 19th-20th.</li> <li>- Attendance of the 3<sup>rd</sup> Scientific Coordination Meeting (Madrid)</li> <li>- Attendance of the caENTI 4<sup>th</sup> Scientific Coordination Meeting (September, 28<sup>th</sup> and 29<sup>th</sup> September 2007)</li> <li>- Analysis of the WP5 drafts-reports on quality letter the conference Huelva Conference</li> <li>- Elaboration of the Quality Letter.</li> <li>- Process of validation of the Quality Letter.</li> <li>- Organization of WP5 workshops in International Conference of Huelva.</li> <li>- Attendance of the WP5 International Conference of Territorial Intelligence, Huelva.</li> <li>- Attendance caENTI 5<sup>th</sup> Scientific Coordination Meeting held in Huelva June, 13<sup>th</sup> and 14<sup>th</sup> 2008.</li> <li>- Participation to the the elaboration of storyboard of the Video: “Research is at territories intelligence service (D50).”</li> <li>- Organization of the WP5 workshops of the International</li> </ul>
	Zoltan WILHEM	1,5	

			<ul style="list-style-type: none"> <li>- Conference of Territorial Intelligence in Besançon.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Besançon.</li> <li>- Video interviews organization and recording and gathering of materials.</li> </ul>
UAB	Mihai PASCARU-PAG	3	<ul style="list-style-type: none"> <li>- Attendance of the caENTI first Scientific Coordination Meeting.</li> <li>- Elaboration of the WP5 internal draft report UAB.</li> <li>- WP5 Coospace Scene maintenance.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Alba Iulia.</li> <li>- Final version Catalogue of Experiences UAB.</li> <li>- Preparing the working-papers: RESEARCH ACTION and UAB CATALOGUE presented in Liège meeting and available in Coospace WP5 Scene.</li> <li>- Attendance 2° Scientific Coordination Meeting WP5 in Liège, January, 19th-20th.</li> <li>- Attendance 3° Scientific Coordination Meeting WP5 (Madrid)</li> <li>- Attendance 4° Scientific Coordination Meeting WP5 (28<sup>th</sup> and 29<sup>th</sup> September 2007 in Huelva)</li> <li>- Elaboration of the Quality Letter.</li> <li>- Process of validation of the Quality Letter.</li> <li>- Organization of Wp5 workshops in International Conference in Huelva.</li> <li>- Attendance International Conference of Territorial Intelligence, Huelva.</li> <li>- Edition of Huelva conference proceedings.</li> <li>- Attendance International Conference of Territorial Intelligence, Besançon.</li> </ul>
	Felician COTEA	1	
	Emilia PAVEL IVANCU	0,5	
	Laura VOICULESCU	1,5	
UNISA	Natale AMMATURO	2,5	<ul style="list-style-type: none"> <li>- Attendance 1° Scientific Coordination Meeting WP5.</li> <li>- Elaboration internal draft report UNISA for WP5.</li> <li>- Coospace Scene WP5 maintenance.</li> <li>- Attendance International Conference of Territorial Intelligence, Alba Iulia.</li> <li>- Final version Catalogue of Experiences UNISA.</li> <li>- Preparing the working-paper: UNISA CATALOGUE presented in Liège meeting and available in Coospace WP5 Scene.</li> <li>- Attendance 2° Scientific Coordination Meeting WP5 in Liège, January, 19th-20th.</li> <li>- Attendance 3° Scientific Coordination Meeting WP5 (Madrid)</li> <li>- Attendance 4° Scientific Coordination Meeting WP5 (28<sup>th</sup> and 29<sup>th</sup> September 2007 in Huelva)</li> <li>- Elaboration of the Quality Letter.</li> <li>- Process of validation of the Quality Letter.</li> <li>- Organization of Wp5 workshops in International Conference in Huelva.</li> <li>- Attendance International Conference of Territorial Intelligence, Huelva.</li> <li>- Attendance 5th Scientific Coordination Meeting held in Huelva June, 13<sup>th</sup> and 14<sup>th</sup> 2008.</li> <li>- Coordination of the Catalogue of participation action-research methodologies, especially those suitable to be applied to territorial intelligence development projects (D48)</li> <li>- Participation in the elaboration of storyboard of the Video: "Research is at territories intelligence service (D50)."</li> <li>- Organization of the workshops of wp5 in the International Conference of Territorial Intelligence in Besançon.</li> <li>- Attendance International Conference of Territorial Intelligence, Besançon.</li> <li>- Video interviews organization and recording and gathering of materials.</li> </ul>
	Tullia SACCHERI	1,5	
ZRCSAZU	Tatjana VELJANOVSKI	0,5	<ul style="list-style-type: none"> <li>- Process of validation of the Quality Letter.</li> </ul>
THU	Jing SHIANG	0,5	<ul style="list-style-type: none"> <li>- Elaboration of the Quality Letter.</li> <li>- Process of validation of the Quality Letter.</li> <li>- Organization of Wp5 workshops in International Conference in Huelva.</li> </ul>

			<ul style="list-style-type: none"> <li>- Attendance of the International Conference of Territorial Intelligence, Huelva.</li> </ul>
ACCEM	Julia FERNANDEZ QUINTANILLA	0,5	<ul style="list-style-type: none"> <li>- Attendance of the WP5 Scientific Coordination Meeting.</li> <li>- WP5 Coospace Scene maintenance.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Alba Iulia.</li> <li>- Elaboration of deliverable 42 (Joint activity Valdocco-OLE-Accem)</li> <li>- Attendance of the WP5 Scientific Coordination Meeting in Liège, January, 19<sup>th</sup> -20<sup>th</sup>.</li> <li>- Attendance of the WP5 Scientific Coordination Meeting (Madrid)</li> <li>- Attendance of the WP5 Scientific Coordination Meeting (September, 28<sup>th</sup> and 29<sup>th</sup> 2007 in Huelva)</li> <li>- Elaboration of the Quality Letter.</li> <li>- Process of validation of the Quality Letter.</li> <li>- Organization of the WP4 workshops for the International Conference in Huelva.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Huelva.</li> <li>- Attendance of the 5<sup>th</sup> Scientific Coordination Meeting held in Huelva June, 13<sup>th</sup> and 14<sup>th</sup> 2008.</li> <li>- Participation to the elaboration of the storyboard of the Video: "Research is at territories intelligence service (D50)."</li> <li>- Organization of the WP5 workshops of the International Conference of Territorial Intelligence in Besançon.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Besançon.</li> <li>- Video interviews organization and recording and gathering of materials.</li> </ul>
	Enrique BARBERO RODRIGUEZ	1,5	
OPTIMA	Aurore URBANO	0,5	<ul style="list-style-type: none"> <li>- Attendance of the WP5 second Scientific Coordination Meeting WP5 in Liège, January, 19<sup>th</sup> -20<sup>th</sup>.</li> <li>- Elaboration of the Quality Letter.</li> <li>- Process of validation of the Quality Letter.</li> <li>- Organization of the WP5 workshops during the International Conference in Huelva.</li> <li>- Attendance of the International Conference of Territorial Intelligence of Huelva.</li> </ul>
INTEGRA	Christiane MARECHAL-RULOT	0,5	<ul style="list-style-type: none"> <li>- Attendance of the caENTI WP5 second Scientific Coordination Meeting in Liège, January, 19<sup>th</sup> -20<sup>th</sup>.</li> <li>- Elaboration of the Quality Letter.</li> <li>- Process of validation of the Quality Letter.</li> <li>- Organization of the WP5 workshops during the International Conference in Huelva.</li> <li>- Attendance of the International Conference of Territorial Intelligence of Huelva.</li> <li>- Participation to the elaboration of the storyboard of the Video: "Research is at territories intelligence service (D50)."</li> <li>- Organization of the WP5 workshops during the International Conference of Territorial Intelligence in Besançon.</li> <li>- Attendance of the International Conference of Territorial Intelligence of Besançon.</li> <li>- Video interviews organization and recording and gathering of materials.</li> </ul>
ADAPEI	Jean-Pierre MULLER /Anne PEREZT	0,5	<ul style="list-style-type: none"> <li>- Elaboration of the Quality Letter.</li> <li>- Process of validation of the Quality Letter.</li> <li>- Organization of the WP5 workshops during International Conference in Huelva.</li> <li>- Attendance of the International Conference of Territorial Intelligence of Huelva.</li> <li>- Participation to the elaboration of the storyboard of the Video: "Research is at territories intelligence service (D50)."</li> <li>- Organization of the WP5 workshop during the International Conference of Territorial Intelligence in Besançon.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Besançon.</li> <li>- Video interviews organization and recording and gathering of</li> </ul>

			materials.
COCAGNE	Jean-Guy HENCKEL	0,5	<ul style="list-style-type: none"> <li>- Elaboration of the Quality Letter.</li> <li>- Process of validation of the Quality Letter.</li> <li>- Organization of the WP5 workshop during the International Conference of Huelva.</li> <li>- Attendance of the International Conference of Territorial Intelligence, of Huelva.</li> <li>- Participation to the elaboration of storyboard of the Video: "Research is at territories intelligence service (D50)."</li> <li>- Organization of the WP5 workshops during the International Conference of Territorial Intelligence in Besançon.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Besançon.</li> <li>- Video interviews organization and recording and gathering of materials.</li> </ul>
VALDOCCO	Concepción MARTÍNEZ/M <sup>a</sup> Carmen GAÑÁN	0,25	<ul style="list-style-type: none"> <li>- Attendance of the WP5 first Scientific Coordination Meeting.</li> <li>- Coospace WP5 Scene maintenance.</li> <li>- Attendance of the International Conference of Territorial Intelligence of Alba Iulia.</li> <li>- Elaboration of the deliverable 42 (Joint activity Valdocco-OLE-Accem)</li> <li>- Attendance of the WP5 Second Scientific Coordination Meeting in Liège, January, 19<sup>th</sup>-20<sup>th</sup>.</li> <li>- Attendance of the caENTI WP5 third Scientific Coordination Meeting (Madrid)</li> <li>- Attendance of the caENTI Fourth Scientific Coordination Meeting (September, 28<sup>th</sup> and 29<sup>th</sup> 2007 in Huelva)</li> <li>- Elaboration of the Quality Letter.</li> <li>- Process of validation of the Quality Letter.</li> <li>- Organization of the WP5 workshops during International Conference of Huelva.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Huelva.</li> <li>- Attendance of the WP5 5<sup>th</sup> Scientific Coordination Meeting held in Huelva June, 13<sup>th</sup> and 14<sup>th</sup> 2008.</li> <li>- Participation to the elaboration of a storyboard of the Video: "Research is at territories intelligence service (D50)."</li> <li>- Organization of the WP5 workshop during the International Conference of Territorial Intelligence in Besançon.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Besançon.</li> <li>- Video interviews organization and recording and gathering of materials.</li> </ul>
	Maria Isabel FRANCO LIGENFERT	0,25	
BARANYA	Gabor POLA	0,5	<ul style="list-style-type: none"> <li>- Elaboration of the Quality Letter.</li> <li>- Process of validation of the Quality Letter.</li> <li>- Organization of the WP5 workshop during the International Conference of Huelva.</li> <li>- Attendance of the International Conference of Territorial Intelligence, Huelva.</li> <li>- Participation to the elaboration of a storyboard of the Video: "Research is at territories intelligence service (D50)."</li> <li>- Organization of the WP5 workshops during the International Conference of Territorial Intelligence of Besançon.</li> <li>- Attendance of the International Conference of Territorial Intelligence of Besançon.</li> <li>- Video interviews organization and recording and gathering of materials.</li> </ul>
TOTAL		48,5	

#### 2.6.1.4. Coordinations activities

From March 2006 to February 2009, eighth scientific coordination meetings were held within the WP5 framework. Contents of and participants to these meetings are described in the caENTI « Minutes » (deliverable 10).

- WP5 scientific coordination meeting (05/05/06 in Huelva, Spain)
- Fourth annual conference of territorial intelligence (20-22/09/06 in Alba Iulia, Romania)
- WP5 scientific coordination meeting (18 and 19/01/07 in Liège, Belgium)
- WP5 scientific coordination meeting (13 and 14/04/07 in Madrid, Spain)
- WP5 scientific coordination meeting (28 and 29/09/07 in Huelva, Spain)
- Fifth annual conference of territorial intelligence (24-27/10/07 in Huelva, Spain)
- WP5 scientific coordination meeting (13-14/06/08 in Huelva, Spain)
- Sixth annual conference of territorial intelligence (15-18/10/08 in Besancon, France)

The WP5 Scene in the cooperative tool Coospace was activated on the first days of May 2006. Until February 2007 ten working papers were loaded up to this scene, as well as six catalogues, one for each Participant University, and twenty four analytical descriptions of caENTI members action-research experiences.

During the second reporting period, the coordination of the specific task was rather based on direct contacts by email, because the preparation of the Quality Letter suggestion involved a small group of researchers. In this case, email is a more direct interaction way of means. After the conference of Huelva, the WP5 created a new Scene on Coospace, called “Quality Letter of Action-Research favouring territorial sustainable development governance”. Its objective was to share the main documents regarding the Quality Letter debate. The workgroups was led by the Universities of Liège, Huelva, Franche-Comté, Pécs, Salerno and Alba Iulia and the documents resulting from their debates were also uploaded on Coospace.

During the last caENTI period, the WP5 created two new Scenes on Coospace: one regarding the video and the other one regarding the catalogues, in order to share documents and other uploaded materials.

#### **2.6.1.5. Joint or cross activities with others WP**

During the caENTI second period the work, the WP5 work was much linked to the preparation of the Second Annual International Conference of Territorial Intelligence, entitled “Territorial Intelligence and Governance: Participative action-research and governance applied to

territorial development”. This event was held in Huelva from October, 24<sup>th</sup> to 27<sup>th</sup> 2007 and it focused on the debate on the WP5 topics, and especially on the participation potentialities and limits and on the difficulties generated by the Multidimensionality, Partnership, Participation, Transformation, Sustainability, Transparency, Co-responsibility and Co-learning principles implementation within the framework of the territorial action-research activity.

The specific thematic areas of the conference were:

**A.** The participative action-research applied to sustainable territorial development.

- Participative action-research activity vs. Conventional research activity.
- Analysis and implementation of the principles which sustain territorial action-research activity: sustainability, multidimensionality, partnership, participation...
- Participative action-research and territorial governance.

**B.** Application of the methods and tools of participative action-research to sustainable territorial development.

- Participative methods for territorial action-research: potentialities and limits.
- Instruments and tools based on the information and communication technologies and applied to participative action-research on sustainable territorial development: potentialities and limits.

**C.** Analysis of Participative Action-research Experiences applied to territorial projects diagnosis, programming, management and evaluation

- Analytical texts based on concrete experiences that allow drawing conclusions about the efficiency of the used participative methodologies, as from the knowledge generation point of view as from the solving of the defined problematic one.

Most of the group involved in the elaboration of the Quality Letter proposal was also involved in the conference scientific and technical organization. The WP5 Leader was the responsible of the local team organizing this conference and several members of this work group were involved in the local scientific committee too.

On the other hand, the WP5 main links with the rest of the caENTI Work Packages are shown in the following figure:

QuickTime™ et un  
décompresseur  
sont requis pour visionner cette image.

*Diagram 4: Links of the WP5 with the rest of the caENTI Work Packages*

In order to coordinate the WP5 activities with the rest of the Work Packages one, during the caENTI last year the WP5 leader worked with the WP4S (Synthesis) and the WP6U (Uses of the territorial intelligence tools) and she attended the scientific coordination meetings of Pecs in May 2008, Besançon in June 2008 and the two seminars of the caENTI final reports drafting in Huelva in January 2009 and in Besançon in February 2009.

**2.6.2. Workpackage 5 “Governance” progress toward objectives**

In general, the WP5 activities focus on mutualisation, systematisation, capitalisation and diffusion of knowledge and know-how. During the first phase, the individual reports consisted in catalogues of the action-research experiences of caENTI research teams. They were thought as a basis to make comparative analysis and mutualisation. Those reports were elaborated in 2006 and 2007 and they were debated during local meetings with actors and researchers. The criteria linked to the structure, contents and extension of those reports were established during the project first two months. Joint conclusions linked to the preliminary teams reports were raised in scientific coordination meetings and workshops, mainly during the Annual International Conference of Alba Iulia (WP2) and the WP5 scientific coordination meeting of Liège.

Apart from the ten working papers presented during the scientific coordinations meeting of Huelva and Liège (that are available in CooSpace) and the Communication *Analysis of the application of the governance principles of sustainable development to territorial action-research* presented by the WP5 leader during the International Conference of Alba Iulia, the WP5 performance during 2006 led to six catalogues of experiences, including twenty-four analytical descriptions of action-research experiences (deliverables D34 to D39, available to the caENTI consortium members in CooSpace) and to the public document *Application of the governance principles of sustainable development to territorial action-research* (deliverable 40, published on the caENTI website).

Regarding the specific activities developed during the caENTI first twelve months, they were the following ones:

- The *Kick-off* meeting was celebrated in the University of Franche Comté on March, 23<sup>rd</sup> and 24<sup>th</sup> 2006.
- In April 2006, the definitive constitution of the WP5 was finished.
- The *WP5 Scene* on the cooperative tool CooSpace ([www.territorial-intelligence.eu](http://www.territorial-intelligence.eu)) was activated on the first days of May 2006.
- The first scientific coordination meeting was organized by the Observatoire Local de Empleo of Huelva University. The caENTI members who had specific tasks to perform during the project first phase attended this meeting on May, 5<sup>th</sup> 2006.

The main objective of this first meeting of May, 5<sup>th</sup> 2006 was to focus on the coordination activities that might be performed during the project first phase (from March to December 2006) and to agree on a suitable calendar for the whole project.

The following researchers (one at least by university, and the representatives of two Spanish territorial actors) attended this meeting:

UHU: Blanca MIEDES UGARTE, Dolores REDONDO TORONJO, Manuela DE PAZ BAÑEZ, Maria Jose ASENSIO COTO, Antonio MORENO MORENO, Olga MÍNGUEZ MORENO,

UFC : Jean-Jacques GIRARDOT, Laurent AMIOTTE SUCHET

ULG : Serge SCHMITZ

PTE: Csilla FILO, Peter ACS, Zoltan WILHELM

UAB: Mihai PASCARU-PAG, Maria MURESAN

UNISA : Natale AMMATURO , Tullia SACCHERI

ACCEM : Enrique BARBERO RODRIGUEZ , Julia FERNANDEZ QUINTANILLA

VALDOCCO: Maria Isabel FRANCO LIGENFERT

A session opened to local academics, researchers and territorial actors was held. During this one, Jean Jacques GIRARDOT made a public presentation of caENTI, whilst underlining the project main objectives and activities. In the course of this same open session, Mihai PASCARU gave a presentation of the International Annual Conference of caENTI which would be held in Alba Iulia in September 2006.

This meeting also allowed enhancing Coospace use; indeed, Peter ACS presented its guide of use and keys. The WP5 scene would be thereafter a tool for the elaboration of catalogues, synthesis and conclusions.

Blanca MIEDES UGARTE and Dolores REDONDO TORONJO presented two communications: in the first one, there was the WP5 programme (following the milestones of the caENTI Document of Work) and in the second one they suggested a guide for the catalogues of the experiences elaboration. These presentations were debated by the participants, in order to establish the definitive work program.

The six catalogues of experiences draft versions were addressed to the WP5 leader, who analysed their contents, in order to prepare the WP5 workshop of the International Annual Conference of Alba Iulia.

The second scientific coordination meeting of the WP5 members was held within the framework of the WP5 Session in the International Conference in Alba Iulia.

During this second meeting, a synthesis of the main points included in the catalogues first versions was debated. The WP5 research team members belong to diverse disciplinary fields and take part in different research structures, as a consequence they presented different approaches and points of view in elaborating their individual catalogues. Therefore, some members had not understood and answered all the questions in the same way and it generated a remarkable heterogeneity in the answers. Notwithstanding, general guidelines were respected and the answers diversity constituted a good starting point, to have deeper debates during the next stages.

All the caENTI members who attended the International Conference of Alba Iulia attended this meeting. It was focused on the debate about the main different points of view, lacks or incoherencies observed in the individual draft reports, in order to debate them and redirect the elaboration of the final individual reports. All the conclusions were incorporated within the final version of the WP5 communication “*Analysis of the application of the governance principles of sustainable development to territorial action-research*”.

The WP5 third scientific coordination meeting was held in Liège on January, 19<sup>th</sup> and 20<sup>th</sup> 2007.

In 2007, it was planned the work of each research group would be revised and debated by a group composed by three people (one representing actors and two representing two research groups). The intended goal was to reach a deeper debate on the principles, objectives and methods of each research group, on the basis of the catalogues it wrote in 2006.

This work final objective was to identify the best practices and the main characteristics the action-research processes should present to be able to become useful tools of decision-making for the actors and the partnership networks in which they are involved.

In 2007, the WP5 members had to write a proposal of Letter of quality that should include ethical and methodological principles they considered as having to be respected to lead a quality research genuinely at the service of quality territorial action enhancing territorial governance. This Quality Letter had to be presented during the International Conference of Huelva in October 2007.

The main objective of this third meeting was to debate the methodology and the constitution of the work-groups, in order to deal with comparative cross-evaluations which implemented in 2007 on the basis of the former catalogues.

The following researchers attended this meeting:

UHU: Blanca MIEDES UGARTE, Dolores REDONDO TORONJO.

UFC : Jean-Jacques GIRARDOT, Laurent AMIOTTE SUCHET, Cyril MASSELOT Amélie BICHET-MIÑARO Jean-Louis POIRET

ULG : Serge SCHMITZ, Guénaël DEVILLET

UAB: Mihai PASCARU-PAG

UNISA : Natale AMMATURO , Tullia SACCHERI

ACCEM : Enrique BARBERO RODRIGUEZ , Julia FERNANDEZ QUINTANILLA

VALDOCCO: Concha MARTÍNEZ-MARTÍNEZ.

OPTIMA: Jean-Marie DELVOYE

INTEGRA +: Christiane MERECHAL-RULOT

The session started with a brief presentation of the work programme by the WP5 leader and then by a presentation by Mihai PASCARU about *L'intelligence territoriale, la gouvernance et la recherche-action. Quelques expériences roumaines* (Territorial intelligence, governance and research-action. Some Romanian experiences).

Afterwards, in order to fix the starting point of the task the group had to deal with, each university made a presentation of the main conclusions it drew from its final catalogue of experiences and the WP5 leader lastly presented a synthesis of the whole catalogues content.

As a consequence, the WP5 presented and debated the proposal of work organization in 2007.

It agreed on the constitution of seven work-groups:

UHU ULG OPTIMA	UFC UHU VALDOCCO	UAB UNISA COCAGNE
PTE UFC ADAPEI	ULG UAB INTEGRA+	UNISA PTE BARANYA
ACCEM + ONE MEMBER OF EACH GROUP: SYNTHESIS OF QUALITY LETTER		

From the principles defined in the Document *Analysis of the application of the governance principles of sustainable development to territorial action-research* (Multidimensionality, Partnership, Participation, Transformation, Sustainability, Transparency, Co-responsibility, Co-learning), each of these groups had to debate about the consequences of applying these principles to social-research processes, and, if applying these principles, the consequences as regards some specific research-processes aspects:

- The selected research topics.
- The suitable research methodologies.
- The intended research results (social impact).
- The actors and researchers' roles: Which kind of relations? Which responsibilities should take each one in the action-research processes?

It was established a calendar until October 2007 and it was defined the next meeting would take place in Madrid, April 13<sup>th</sup> and 14<sup>th</sup> 2007 in order to debate the preliminary results of the work teams and to prefigure the main elements of the Quality Letter.

Regarding the contents of the scientific activities and meetings during the first period (March 2006 to February 2007), in May 2006 in Huelva by elaborating the catalogues of experiences, the research teams agreed on answering the following questions based on their own action-research experience:

- What is the general framework for the relations between sustainable development, territorial governance principles, research in Humanities and Social Sciences and territorial intelligence?
- How does action-research improve territorial governance and favouring sustainable development?
- How do the principles of balanced approach, participation and partnership condition research?
- How do new technologies influence these processes?

The following methodology was chosen to develop the catalogues:

- Every University had to report its reflections and its accumulated experience based on common guidelines (a 20-30 pages document and 2-3 pages by experience).
- The reports should be presented and debated during the Conference of Alba Iulia, within the WP5 workshop framework.
- The workshop members should revise and add comments on the reports. These reviews and the workshop conclusions should be integrated in a common document. This final report should constitute the deliverable of the project: “Application of the sustainable development governance principles to the territorial action-research” (deliverable 40).

The debate on these topics allowed remembering the multidimensional character of the WP5 work. In addition to this, an interesting debate on the action-research concept arose. For fundamentally practical reasons but also in order to define limits for the researchers who would draft the catalogues of experiences, the group decided to concentrate its work on the action-research experiences that met both following conditions:

- The research object concerns territorial development, local governance, sustainable development and territorial intelligence.
- They have been developed *for or with* territorial actors.

In the following paragraphs, some of most controversial points which have arisen in the catalogues (that analyse twenty-four real research experiences) and subsequent debates are described.

### **2.6.2.1. Action-research concept.**

The caENTI partners has tried to reinforce the relation between research and action in the territorial socio-economic development field during the past fifteen years. Their research

projects were direct or indirectly linked to development projects on territory, in collaboration with the actors in charge of these territorial projects management.

However, this collaboration between research and action does not always reach the same intensity. In one of the scale limits, the grade of the actors' involvement can be minimum and only consists in asking a study that will become the basis to design policies or territorial actions. On the contrary, actors and researchers are part of the same research team and jointly carry out the research within a territorial project framework.

Between one and another side there is a wide variety of situations, therefore one of the WP5 main challenges is delimited by the participation level, from which it can be determined the genuine articulation between research and action. In other words, another WP5 objective is to define an action-research concept that allows operationalising the terms of the commitment between science and society, in order to foster territorial governance.

The bibliographical revision carried out by the WP5 participants shows that the action-research concept has been defined in a different way by authors of different disciplines. In addition, within the framework of each disciplinary field, the concept is already evolving, what indicates that this concept is still under construction in a certain way.

The debate within the WP5 that took place during the caENTI first year allowed reaching an initial definition that made compatible the different points of view. According to it, action-research is the kind of survey which meet these two requirements:

- It is carried out in order to achieve simultaneously and articulately both objectives, a research objective and an action objective.
- It is a participatory research which is carried out with, and not only for, the territorial actors.

Taking this consensual definition as a starting point, it can be said that, in the wide meaning, the action-research is not a mere methodology or technical speciality, but rather a way to understand social science (Wadsworth, 1998) and, more generally, the whole scientific activity.

The philosophy of the action-research, such as it is developed by the caENTI partners, implies the researcher's will to assume an actor role. The border between action and research is voluntarily kept permeable. It is not anymore a donor /receptor relationship but it has become a winner/winner one. Indeed, the researcher considers his/her implication in the action as a privileged way to confront himself/herself to reality and to develop his/her research whilst choosing to assume –with the actors- the consequences of the projects they

carry out together. This particular design of the action-research was initially requested by the field actors, it does not result from an institutional request. This action-research concept implies to move out from a research “for” the actors, conceived as the answer to a request of the social reality analysis institutions, towards an action-research “with” actors, conceived like a collaborative project of social reality transformation.

This is a way to lead research which wonder about the effects of the external choices that scientists do when they lead their research regarding as regards the outlined questions, the focused problems, the used methods, the involved actors, the recommendations that are made as the results consequences, etc. This is a focus that implies to explicitly recognize and internalize the ethical issues involved in all the research process.

From this recognition, another of the main WP5 challenges arises: defining which are the ethical and methodological principles that should be respected by the action-research processes, so that its results foster territorial governance.

#### **2.6.2.2. Governance principles of sustainable development.**

The caENTI Declaration of Work establishes that during this project first year the WP5 members would carry out a debate on the governance principles of sustainable development. This debate result should be the analysis framework composed by ethical and methodological principles which ought to be respected by action-research processes, in order to foster a more effective adaptation of territorial action to the inhabitants’ needs and to boost the participation of actors involved in decision-making processes.

The following three basic set of principles were evoked during the debates.

Firstly, just as it was described in the DOW, the caENTI framework regarding the basic principles that must be respected by the research-action processes fostering territorial governance of sustainable development are the three ones that were praised by the European Union in the Community programs and initiatives in the economic and social development field:

- Multidimensionality: working on the research object by using a multidimensional and multisectorial well-balanced approach.
- Partnership: fostering and involving territorial partnerships in the action-research processes.
- Participation: guaranteeing territorial actors’ participation is carried out in an effective way.

The second considered set of principles consists in those formulated by the European Union in 2001 regarding “good governance”<sup>5</sup>:

- Transparency in the decisions-making processes,
- Citizenship participation,
- Well-balanced assignment of responsibility and accountability,
- Coherence of the political measures and actions,
- Coordination of the involved sectors.

Thirdly, the WP5 considered the principles linked to sustainable development policies enunciated by the Summit of Brussels of June of 2005<sup>6</sup>:

- Promotion and protection of fundamental rights,
- Intra and intergenerational solidarity,
- Open and democratic society,
- Citizens’ participation,
- Public-private partnerships with companies and social actors,
- Coherence of policies and governance,
- Exploitation of the best available knowledge,
- Caution principle, and
- “Who contaminates pay” principle.

Considering the second and third principles sets allowed the WP5 adding to the three original principles described in the DOW other five basic principles that should be respected by the action-research processes:

- Transformation: it is an implicit principle in the action-research concept; it consists in fostering the transformer role research can performed on social reality.
- Sustainability: it consists in carrying out long term research processes which are required to get a more evolutionary knowledge, in order to generate sustainable territorial development dynamics.
- Transparency: the action-research processes must lead to a higher transparency of the results regarding both knowledge and policies, and facilitating and democratizing the decisions-making processes.
- Co-responsibility: the “action” and “research” components are equally responsible for the process evolution.

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<sup>5</sup> COMMISSION DES COMMUNAUTÉS EUROPÉENNES (2001): Gouvernance européenne. Un livre blanc. COM (2001) 428 final.

<sup>6</sup> Conclusions de la présidence – Bruxelles, 16 et 17 juin 2005, Conseil Européen, 10255/1/05 REV 1 29, Annexe I.

- Co-learning: the action-research processes should facilitate all the participants' cooperative learning, improving the territorial system ability to look for solutions to the future problems, whilst keeping in mind their past experience. In other words, they ought to strengthen the territorial intelligence development.

In order to be effective, these principles application should affect all the research stages: the topics selection, the used methodology, the pursued results and the results systems diffusion and transfer. Their implementation is complex, hence the necessity to analyse the methods and action-research protocols that can facilitate its future development

It is interesting to point out this concept of action-research is at the origin of new collaborative working methods development, and consequently of a systematic appeal to the I. C. T. However, if these methods tend to redefine the scientific activity, they also bring new ethical questionings to the researchers.

### **2.6.2.3. Limits and potentialities of the applicability of action-research processes.**

Another aspect in which the WP5 focused much is the identification of the limits the effective practical application of these principles imposes to the research processes and the potentialities its use extension can foster.

Regarding the limits, they are basically concentrated on the institutional context where the action-research processes are performed.

Considering the research dimension, although the need to development multidisciplinary approaches being carried out in partnership is generally acknowledged, neither the systems of research funding, nor the scientific diffusion means, nor the structure of academic merits boost this kind of projects, especially in the social sciences field. On the other hand, participatory methods are, in some cases, unjustifiably considered as suspicious and accused of lacking of objectivity.

From the action point of view, there are also several factors limiting the applicability and extension of the action-research practices: the urgency of the territorial needs which does not allow using time and resources for research, the imposed “management by projects” system which leads to public policies and actions fragmentation, the variability of actors involved in territorial actions, the capacity and the motivation of the territorial actors to appropriate and internalize research methods and tools by incorporating them in their daily management and, of course, of actors' will to generate genuine participatory processes in the long term.

Regarding to potentialities, all the WP5 participants pointed out the absence of systematic evaluations, what prevent from evaluating the impact of the action-research projects on territorial governance in a precise way. However, the action-research projects results analysis which was summarized in the catalogue of experiences allows sketching some of the positive aspects to be expected from this approach.

The general idea is that this kind of research fostering actors' information and knowledge-sharing, allows a better adaptation of actions to territorial needs, a higher coordination and coherence of policies and a better resources allocation. Participatory methods particularly enhance social capital, whilst increasing transparency and generating confidence among the actors.

Another meaningful expected effect of this kind of action-research processes is the actors' appropriation of scientific methods and tools to analyse, manage and evaluate territorial projects, which have been adapted in each case to their own specifics needs. These elements can develop a culture of evaluation that allows actors getting a more systematic learning from their experiences. These effects final consequence is the actors' empowerment, and the augmentation of their endeavour capacity.

The benefits for the research are obvious as well. This kind of processes provides more relevant information and confronting research results in a more direct way.

The question is that the generation of these positive results is by no means automatic. The development of a participation culture favouring the development of territorial intelligence is not a linear process. There are so many involved variables that the progresses can be followed by important setbacksn having strong adverse effects (institutional confidence failures, for example). This is the reason why it is so important to analyse these processes and to study in depth the possible ethical and methodological rules leading to better results.

Indeed, a subject of particular interest for the WP5 it studied during the third reporting period was the potentialities and the limits information and communication technologies use can provide to these processes. The use of new technologies is essential to the development of the action-research, in particular by allowing the installation of a collaborative workspace on Internet and by improving circulation and indexing of information, but the appeal to the ICT poses a problem with an ethical nature (the personal data confidentiality) and requires competences which are not always available for territorial actors.

During the caENTI reporting period, the fourth WP5 scientific coordination meeting was held, precisely on April 2007, 13<sup>th</sup> and 14<sup>th</sup> in ACCEM offices in Madrid. This meeting aimed to coordinate the elaboration of the Quality Letter of action-research proposal, by integrating all the debates explained above.

In Madrid, the starting point was the list of principles agreed in Liège: Multidimensionality, Partnership, Participation, Transformation, Sustainability, Transparency, Co-responsibility and Co-learning.

The work the group dealt with in Madrid consisted in:

1. Completing the list of principles and defining them in a more precise way.
2. Analysing the main implications of their application in real action-research projects (including the possible adverse effects) on:
  - a. Action-research topics to be selected
  - b. Methodologies: main characteristics
  - c. Pursued Results: social and scientific pursued impact
  - d. Use, diffusion and transfer of the results systems
  - e. Actors' and researchers' role within action-research processes (relations and responsibilities).
3. As the implementation of these principles is very complex, we wanted to specify the methods and **action-research protocols** that can facilitate its application.

The results of this debate gave us the needed elements to draft the European quality Letter of action-research favouring the territorial governance of sustainable development.

The participants to the meeting of Madrid made a brief presentation, summing up their ideas regarding points 1, 2 and 3. This presentation objective was to promote a brainstorming session. Each team included in its presentation the elements it considered more interesting or more necessary to be included in the Quality Letter. The main issues debated during these sessions were:

#### **2.6.2.4. Action-research Principles:**

Regarding the principles they were definitively enunciated as follows:

1. Transformation: it is an implicit principle in the action-research concept; it consists in fostering the transformer role research can performed on social reality. Social needs are the starting point.
2. Multidimensionality: focusing on research object using a multidimensional and multisectorial well-balanced approach.
3. Partnership: fostering and involving territorial partnerships in the action-research processes.
4. Participation: guaranteeing territorial actors' (those who are directly face territorial problems) participation is carried out in an effective way.

5. Sustainability: it consists in carrying out long term research processes which are needed to obtain a more evolutionary knowledge, in order to generate sustainable territorial development dynamics.
6. Transparency: the action-research processes must lead to a higher results transparency regarding both knowledge and policies, what facilitates and democratizes the decisions-making processes.
7. Co-responsibility: the “action” and “research” components are equally responsible for the process evolution.
8. Co-learning: the action-research processes must facilitate the cooperative learning of all the participants, improving the territorial system capacity to look for solutions to the future problems, whilst keeping in mind their past experience. In other words, they ought to strengthen the territorial intelligence development intelligence.

#### **2.6.2.5. Concept of a “Quality Letter” :**

The group also agreed on focusing on the elaboration of the Quality Letter, by the means of drawing up a common set of principles inspiring “better practices” to foster territorial governance through action-research. The aim is this letter can become a reference point for researchers and actors involved in action-research processes linked to territorial development.

##### **2.6.2.5.1. Concept of “Quality” in this context:**

The group concluded that there are two main aspects when considering “quality” regarding action-research processes applied to territorial development:

- Their results (both scientific and political) must lead to a better understanding of the territorial dynamics and they must provide more adapted solutions to territorial needs.
- The action-research processes must help developing territorial research and action capabilities by creating, improving and mobilizing actors and researchers competences.

Both aspects are very important to favour territorial actors, empowerment which is the basis for a real sustainable territorial development in a knowledge-based society.

##### **2.6.2.5.2. Content of the Quality letter:**

The actors decided to adopt the following document structure:

- Context (aims, theoretical foundations, political implications)
- Method (how has it been established, validation process)
- Guidelines: recommendations, instructions, directions, suggestions, advices; regulations, rules, principles, guiding principles; standards, criteria, procedures... Each of them is followed by a short justification-explanation. Topics to be included in this guidelines will be ethical and technical and they will be expressed in terms of principles and protocols. They will include references to the following issues: action-research topics, methodologies, pursued results,

diffusion and transfer results systems, actors' and researchers' role in action-research processes.

Regarding the legitimacy of the caENTI WP5 to define a "Quality letter" the group considered that it is justified on the basis of the wide experience in action-research processes compiled in the Catalogue of experiences (D40).

We should also take into account some elements regarding particular aspects of caENTI action research processes that would be useful to elaborate the Quality Letter: territorial focus (actors' needs), multidimensionality (sectors, disciplines), mix between quantitative and qualitative analysis (methodological rigor). TICs are more than a single means, it is a central tool. We should also take into account territorial pedagogy and mobilization of territorial actors' competences, long term projects and participation should involve at all levels, and *not only at the institutional heads level*. Balanced relations between researchers and actors is another particular aspect of the caENTI research action processes, which try to answer questions, such as *Action-Research, what for and how?* For the caENTI partners in action-research the goal is the process.

The group also considered that the Quality Letter should be completed with some reflections about the value added of each of them, and a special comment about the role technologies of information and communication can play to foster them was made.

From all these elements, a small group of researchers and territorial actors (UFC, UHU, VALDOCCO and ACCEM) was in charge of the elaboration of a draft of the Quality Letter to be presented during the Conference of Huelva.

This draft was debated during the coordination meeting which was held in Huelva on September, 27<sup>th</sup> and 28<sup>th</sup> 2007.

The most important concept arose in these meetings was "Durable collaborative participation". The group reasserted the concept of quality to be worked out from the point of view of both the results and the process.

On the one hand, from the results point of view, the project quality would be based on two complementary aspects: firstly, the action-research project ability to generate knowledge of territorial dynamics (theories, models, indicators) better adapted to the actual conditions, and its ability to develop research methods more suitable for the characteristics and dynamics of the studied object, and secondly, quality would be linked to the action-research project ability to generate a more suitable territorial action facing the people's actual needs.

On the other hand, from the process point of view, the project quality would be found in its ability to generate a permanent learning and co-learning environment to guarantee mobilisation and mutualisation of competences among the territorial actors involved in the territorial development processes on the long term, which could be understood as territorial intelligence development. This exchange refers to the researchers making their knowledge (included analysis tools) more accessible for territorial actors and the latter sharing with the former their proximity knowledge, but also both jointly producing both theoretical and applied new knowledge.

In other words, from the procedural perspective the key factor defining quality in an action-research project is its participants' ability to build a "durable collaborative participation".

Focusing on this fact, the WP5 work group agreed on the four pillars they considered as supporting the action-research quality and aiming at promoting sustainable territorial governance and development. These pillars are based on the previous principles, and can be summarized as follows:

1. Mobilisation of a territory resources.
2. Mutualisation of knowledge and competences.
3. Responsibility of all the participants.
4. Common property of the results.

In this way, the proposal of the Quality Letter finally presented for a general discussion in a plenary session during the Conference of October 2007 included all these reflections and presented a pair of objectives to be achieved for each of these four pillars and a number of recommended activities (or means) to help achieving them.

The values added that justify the choice of the defined objectives and means to be implemented were also included in the proposal: the increasing of the Action-Research representativeness within territory, the generation of trustable networks, the mutual learning between action and research fields, the introduction of continuous systemic assessment in territorial action; the reorientation of research objectives in terms of territorial needs, the valorisation and recognition of social action and research.

The Quality Letter also emphasizes determining role that Information and Communication Technologies play in the quality fostering in a participatory territorial action-research project. The new technologies open new possibilities which are still underdeveloped in terms of collaborative project drawing, especially due to the relation process they imply.

The way in which each of these pillars contributes to the construction of the effective participative collaboration in the long term is summed up in the next figure.

QuickTime™ et un  
décompresseur  
sont requis pour visionner cette image.

*Diagram 5 : European letter of quality for research action*

The Quality Letter proposal was complemented with a tool to assess the Quality Letter that has a particular project. It was shown during the Conference and then it was available for the participants on the caENTI Internet Portal.

The e-tool consisted in defining for each of the objectives of the Quality Letter four pillars three possible states of accomplishment of the targets. It was attributed to each of them a value from 1 to 3. The evaluators are asked to click in each case on the closer situation to

the evaluated action-research (an answer by target). At the end, evaluators get a polar diagram which shows the distance between the evaluated project and the ideal type of action-research project.

The tool is an idea on which WP5 participants worked. The initial states of accomplishment of the targets are not yet precisely defined and the scale 1 to 3 are not fine enough. However, the tool has the virtue of being fairly easy to use and very graphic at the time of presenting the results. However, to become scientifically worthy it needs to better define the possible scenarios and to refine the assigned punctuations to each state, for example by pondering objectives, increasing the number of possibilities and allowing multiple answers and assigning them different values.

During the Conference, the general debate about the Quality Letter focused more on the process of quality evaluation than on the defined quality “content”. There were not substantial observations regarding the four pillars, but they discussed the necessity to include a larger development on the results quality, especially on those linked to more scientific aspects of the action-research projects. During the session also arose the question of the evaluation subject. The redactors of the proposal implicitly assumed that it was an instrument for internal use, a sort of guide to be used by action-research teams that wanted to promote the quality of their interventions, but it was not explicitly expressed on the text. In fact, the caENTI Quality Letter is more a list of recommendations to improve quality than a genuine evaluation tool. It sketches an ideal process of participation in an action research process and the idea is to find a way to evaluate how far the actual projects are from this ideal type. It does not pretend to become a tool for institutional and not contextualized evaluations, but a practical tool for the long life learning of the project participants.

Nevertheless, a better definition of the subjects and procedures of the quality evaluation was strongly recommended. The inclusion of timing and indicators was also suggested in order to improve the proposal.

Another relevant issue was the capability of this Quality Letter to be adapted to the action-research projects heterogeneity. The answer to this objection is this Quality Letter is based on real experiences of caENTI members which are heterogeneous and the proposal can embrace a very large type of territorial action-research projects, but, of course, it has to be adapted by action-research teams in each circumstances.

In order to go deeper in this criticism, in Huelva the WP5 decided the task each partner should deal with by the period end will consist in doing a more deeper “Revision-Evaluation -Validation” of the proposal of the Quality Letter which was presented during the conference.

The plan was that each university organized a debate (in a real meeting or in CooSpace) with its nearest territorial actors about this “Proposal of a European Letter of Quality on Action-Research Favoring Territorial Governance of Sustainable Development”.

In order to make the work as operational as possible, the work teams were made up by researchers and territorial actors, by using a proximity criterion:

UFC + ADAPEI +COCAGNE
UHU + VALDOCCO+ ACCEM
ULG + OPTIMA + INTEGRA
UNISA + 2 or 3 territorial actors with which they usually work.
PTE + BARANYA + 1 territorial actor with which they usually work.
UAB + 2 or 3 territorial actors with which they usually work.

This organization should allow the group making internal and external comments on the document.

In addition, after the conference and taking as a starting point the e-tool linked to the Quality Letter, Laurent AMIOTTE-SUCHET (UFC) and Blanca MIEDES (UHU) worked on an “internal-reflection-gill” in order to build an instrument action-research teams that are interested in the reflexion about the construction of durable action-research partnership can use. The work teams were asked to review and complete this instrument so that it can be updated on the web-site. They were aware the tool is just an internal guide and not an external assessment instrument, and to people whom it is addressed are the members of teams who are carrying out action-research processes. The grid objective is to be jointly fulfilled by the participants of the action-research group in an auto-assessment process.

Each university was responsible of the organization of its own debate and of the writing of a report (Deliverables 41-46) with the following structure:

1. Description of the validation process (if it was held in a seminar, if it was a on-line discussion, email, etc) and description of the participants (that takes part in the debate).
2. Deliberations Results.

- Revision of the “context” section of the Quality Letter.
- Remarks about pillars, objectives, and means.
- Remarks about the proposal of *internal-reflection-grid*.
- Validation of the Quality-letter.

3. Applicability of the Quality Letter to the experiences which were described by each university in their experiences catalogue (or to any other action-research experience in which the territorial actors were involved).

These debates results can be read in the Deliverables 41 to 46. In general, although the conclusions of the debates brought interesting comments and suggestions they were mainly address to formal aspect and not to the genuine contents of the Quality Letter. In general, it can be said that the document was validated by the groups, although there were some heterogeneous specifics remarks.

Most enlightening remarks and meaning comments that were made during the conference were incorporated to the definitive version of the Quality Letter (Deliverable 47).

During the last reporting period (March 2008 to February 2009), the WP5 group had to deal with the deliverables 48, 49 and 50.

The fifth scientific coordination meeting was held in Huelva in June 2008. During this meeting, the participants agreed all deliverables will be ready by the Conference of Besançon in their respective “papers” (the deadline was September, 15<sup>th</sup>) and they will be discussed in a special workshop during this event. After the conference, the debates that would have taken place will be incorporated in the final report.

Regarding the content of the first catalogue (D48) whose editor is Tullia SACCHERI from University of Salerno, it was agreed it would consist in a bibliography revision about theories, methodologies, techniques and tools related to participatory methodologies applied to action-research projects.

For each of them, researchers wrote about the following issues:

- Which sort of characteristics make them interesting for participation and which pillar of the Quality Letter they contribute to
- How to use them in order to foster participation: according to which objectives and means fostering all their potentialities
- Which kinds of uses are not coherent with the participation idea or can make participation more difficult: what should we avoid when applying this methodologies

The second catalogue, whose editor is Laurent AMIOTTE-SUCHET from the University of Franche-Comté (D49) indicates which researchers worked on specific data-processing tools, classified by families (TICS -ppt., email, blogs, wikis, etc.-, Surveys, Data analysis, Spatial analysis, Decision tools, and Evaluation tools) and tries to answer the same questions about fostering participation.

During the international conference in Besançon in October 2008 the first version of the catalogues were compared with the Quality Letter and their main contents were validated. The discussion mainly focused on the difficulties of generating a truly participative process, especially within context where there are institutional weakness.

Regarding the video, the idea agreed in Huelva was to select as target group some beginners in action-research projects, as well as actors, researchers and stakeholders. We decided to make a video with training and communication purposes. This multimedia production uses and combines material from all the partners (photos, slides, interviews, images of working groups and actors territories, etc.)

The main elements of the story board were agreed in Huelva and they were presented and debated with the members of WP4 and WP5 during a scientific coordination meeting in Besançon in June 2008.

QuickTime™ et un  
décompresseur  
sont requis pour visionner cette image.

*Diagram 6 : Main contents of the video*

The video storyboard and its screenplay were validated during the International Conference of Besançon in October 2008. During the conference interviews of the main actors involved in the development of the Territorial Intelligence practices and concepts were interviewed.

During the months of July and January participants gathered the required material and sent it to the coordinator, following the ideas of the previous schema. During the month of February the video was produced, in order to be ready for its presentation and dissemination.

### **2.6.3. Workpackage 5 GOVERNANCE deviations from the project workprogramme**

No substantial deviations occurred. The group delivered the planned deliverables.

### **2.6.4. List of drafted documents and deliverables of workpackage 5 “Governance”**

#### **2.6.4.1. Drafted documents**

- Paper and Power Point Blanca MIEDES UGARTE: Analysis of the application of sustainable development governance principles in territorial action-research.
- Paper and Power Point Blanca MIEDES UGARTE and Dolores REDONDO-TORONJO: Proposal of the draft questionnaire to elaborate the catalogue of research-action experiences: objectives, epigraphs, and contents.
- PowerPoint Jean-Jacques GIRARDOT: caENTI general presentation
- PowerPoint Mihai PASCARU: Presentation of the International Conference of Territorial Intelligence in Alba Iulia 21th to 23th September 2006.
- PowerPoint Peter ACS : Presentation of Coospace.
- Paper and Power Point Mihai PASCARU: Analysis of the governance principles application in territorial research-action of sustainable development
- Power Point Natale AMMATURO and Tullia SACCHIER: Projects on Action-Research in Salerno University.
- Power Point Blanca MIEDES UGARTE: CAENTI WP5 Governance Principles. Synthesis of catalogue of experiences.
- Power Point Blanca MIEDES UGARTE: Second scientific coordination meeting in Liège OLE Action-Research Projects.
- The six draft versions of the catalogues of experiences.
- Paper and Power Point Mihai PASCARU: Analysis of the governance principles application in territorial research-action of sustainable development
- Power Point Blanca MIEDES UGARTE: Quality charter of research for favouring territorial governance of sustainable developments.

- Paper Laurent AMIOTTE-SUCHET: European quality letter of research favoring territorial governance of sustainable development.
  - Paper Csilla FILO AND Zoltan WILHEM: Letter of Quality Pecs University.
  - Paper Laurent AMIOTTE-SUCHET: Letter on Quality Franche- Comté University
  - Power Point Blanca MIEDES: Quality charter of research for favoring territorial governance of sustainable development.
  - Power Point Blanca MIEDES : Final programming CAENTI wp5 until March 2008-2009
  - It has been produced a preliminary draft of the *European quality letter of research favouring territorial governance of sustainable development*.
- The po- ster “European Letter of Quality of Action-Research Favoring Territorial Governance of Sustainable Development”.
- The internal-reflection-gill for action-research teams.
  - The document “Quality Letter Timing Indicators” written by Orsolya Kékkő of University of Pécs.
  - First version of the Catalogue of participation research-action methodologies, especially those suitable to be applied to territorial intelligence development projects
  - First version of the Catalogue of technological tools, especially those suitable to be applied to territorial intelligence development projects (D49, month 32).
  - Storyboard of the Video: “Research is at territories intelligence service.”

#### 2.6.4.2. Deliverables

Del. n°	Deliverable name	WP n°	Date due	Delivery date	Estim. P/M	Used P/M	Lead contractor
D34	Report on research context and practice UFC.	5	10	10	2,5	2,5	UFC
D35	Report on research context and practice UHU.	5	10	10	2,5	2,5	UHU
D36	Report on research context and practice ULG	5	10	10	2,5	2,5	ULG
D37	Report on research context and practice PTE.	5	10	10	2,5	2,5	PTE
D38	Report on research context and practice UAB.	5	10	10	2,5	2,5	UAB
D39	Report on research context and practice UNISA.	5	10	10	2,5	2,5	UNISA
D40	Publication of report: “Application of the sustainable development governance principles to the territorial research-action”.	5	10	10	5	5	UHU
D41	Report on evaluation of the quality letter. Team’s conclusions.	5	22	22	0,5	0,5	UFC

	UFC.						
D42	Report on evaluation of the quality letter. Team's conclusions. UHU.	5	22	22	0,5	0,5	UHU
D43	Report on evaluation of the quality letter. Team's conclusions. ULG	5	22	22	0,5	0,5	ULG
D44	Report on evaluation of the quality letter. Team's conclusions. PTE.	5	22	22	0,5	0,5	PTE
D45	Report on evaluation of the quality letter. Team's conclusions. UAB.	5	22	22	0,5	0,5	UAB
D46	Report on evaluation of the quality letter. Team's conclusions. UNISA.	5	22	22	0,5	0,5	UNISA
D47	Publication of report: "CAENTI European Quality Letter of Action research Favouring Territorial Governance of Sustainable Development."	5	22	22	0,5	0,5	UHU
D48	Catalogue of participation research-action methodologies, especially those suitable for territorial intelligence development.	5	28	28	3	3	UHU
D49	Catalogue of technological tools for territorial intelligence development.	5	28	28	3	3	UHU
D50	Video: "Research is at territories intelligence service".	5	32	32	6	6	UHU
					35,5	35,5	

### 2.6.5. The workpackage 5 "Governance" specific prospects (databases to maintain and actualise, research projects to carry out)

As regard the caENTI WP5 prospect, territorial intelligence is a tool for territorial governance. However both concepts have a complex relations, since, in their turn the evolution of territorial governance promotes the development of territorial intelligence. The driving force behind this feedback process is the actors participation. The intensity and quality of participation is what determines the way in which both processes feed off each other.

Indeed, if territorial governance basically refers to "sharing what we jointly know and think as a result of our diversity and then undertaking coordinated, coherent action", territorial intelligence provides feedback for that process by means of analysis and joint evaluation of

the action developed through diversity, resulting in new shared knowledge which allows an action improvement. In the knowledge-based society, where learning is shared, they are the two faces of the same coin.

Nowadays, thanks to the development of new information and communication technologies, there is an enormous amount of information available and many very sophisticated tools to gather, process and analyse it. The development of territorial intelligence means putting all this potential at the service of territorial action, contributing to the actors involved, not only institutional decision-makers, but the actors most directly involved in the action in the field, incorporating mechanisms in the course of their ordinary activities to facilitate interaction, promoting their individual and joint ability to manage information, to mutualise it and convert it into knowledge which allows them to assess, redirect or design new action. In this sense the continuous work on the design of tools and participatory work methodologies which allow the actors' abilities to be developed is of vital importance.

Prospects of WP5 are going on working and deepening in the study and designing of participatory methodologies and ITC based tools directly applied to enhancing participation in action-research process in particular institutional contexts; in the analysis of the convergence between research quality and action quality processes and its consequences on “quality” of territorial governance; in the dissemination of principles, concepts and uses of territorial intelligence to new territories and domains and in the adaptation of protocols to this new areas.

***2.7. Work package 6 WP6 [Tools for, with and by actors] Design and dissemination of methods and tools of territorial intelligence accessible for the territorial actors and respectful of a sustainable development ethics. Work package leader: Jean-Jacques GIRARDOT, Université de Franche-Comté (France)***

This activity essentially aims at giving a European dimension to research actions on technical tools for the actors and on territorial data sets that are widely started at a local or even at a national scale. We will present:

- The WP6 objectives, work starting point and organization at the beginning of the CAENTI action,
- The activities made during the three project periods, the progress toward objectives.
- The deviation from the project
- The list of deliverables and drafted documents
- The prospects

**2.7.1. Workpackage 6 “Tools” objectives, work starting point and organization**

We will present the WP6 objectives, its starting point and its organization in three separate parts.

As a general objective, the WP6 “Tools for, with and by actors aims at designing, making and disseminating methods and tools of territorial intelligence accessible to territorial actors and that respect the ethics of sustainable development.

It also aims at designing a European Observatory of Elementary School.

At the beginning of caENTI, Catalyse method, which we essentially contemplate as a set of tools, was the work starting point of caENTI and of the workpackage 6 that aimed at “design tools for territorial actors”.

The WP6 organisation was designed to firstly analyse and write the specifications of the Catalyse tools, by harmonising the tools used in Europe by the different observatories Catalyse, in accordance with the European standards, in order to create a « Catalyse » toolkit that offer modules articulated properly.

The second period was devoted to put the bases of their integration in a territorial information system, designed as a geographic information system but more accessible for actors, through an editorial chain.

The third reporting period should allowed drafting the specifications of a territorial information system that will integrate the tools in the logic of this editorial chain. The design of a territorial indicators portal was a step in this system design.

#### **2.7.1.1. Objectives of the WP**

According to the EU policies, the WP6 aims at designing and coordinating the implementation and the documentation of friendly tools, so as to help the actors of territorial sustainable development to elaborate, manage, observe, evaluate and transfer participative projects to multi-sector partnerships.

To design territorial intelligence tools, caENTI was initially inspired by the Catalyse method.

In 2006, the WP6 aimed at defining the specifications of a Catalyse Toolkit, on the basis of the Catalyse method. Catalyse has been used for several years by most of the caENTI participants in multi-sector observatories. The latter use similar tools but gather and process different information contents. The WP6 aims at harmonizing the Catalyse tools and at facilitating their access on Internet.

caENTI considers Catalyse as a reference, but not as a pattern. The WP6 pays interest to all the tools useful for the actors of the territories sustainable development. WP4 “Fundamental methods” surveys the spreading within Humanities and Social Sciences of research procedures in territorial information analysis, fundamental methods and generic tools. They can provide technologies for professional tools of territorial intelligence. WP5 “Governance principles” evaluates the practices of the scientific production that inspire territorial governance and ethic principles, standards and protocols that the territorial research-action and the tools of territorial intelligence should fulfill. WP6 planned to quickly enlarge its research activities to the specifications of an online “Inclusion Itinerary Accompaniment File” IIAF, in 2007. In 2008, it planned to design a specialized portal on European institutional indicators useful for the end actors.

Since the repertory is an online tool, the online IIAF in 2007 and the online indicators in 2008 allowed having all the Catalyse tools in online version at the end of 2008. However, it also implied different functionalities and new tools, as modules of a global online information system. Beyond the Catalyse method, the WP6 also aimed at identifying and valuating complementary tools of territorial intelligence or new ones.

Studying the feasibility of a European Observatory of the Elementary School, OEE, is another WP6 coordination activity. The objectives of this coordination activity are to study the method transferability to the other European countries. The method is being experimented in France by the observatory of rural school to make follow-up of a students troop, in order to evaluate the specificities of the territorial impact on success, knowledge of territories and of on their links with school, social territory representations and mobilization of the local actors. It implied to valuate the accessibility conditions of the information about students, schools and territories in different countries, and to determine the relevant criteria to get a European comparative approach. The Observatory of Rural School uses the Catalyse method and tools.

The **specific objectives** for the third period were the drafting of the specifications of:

- A European portal of webmapping of territorial indicators available online;
- A territorial information system adapted to the development partnerships uses, the Territorial Intelligence Community System.
- A more global survey and experimentations about the uses of territorial tools in the development partnerships.

#### **2.7.1.2. Work starting point**

As a main work starting point, Catalyse essentially articulated three kinds of tools to analyse and confront three kinds of information:

1. A multi-sector **guide of diagnosis and evaluation** gathers individual information about people's needs, so as to define and measure needs profiles. We will call it the "guide" for the sake of simplification.
2. A **services repertory** lists the existing services on the territory, which can meet people's and community groups' needs.
3. A **territorial indicators system** (TIS) integrates territorial indicators that are provided by specialized statistic institutions.

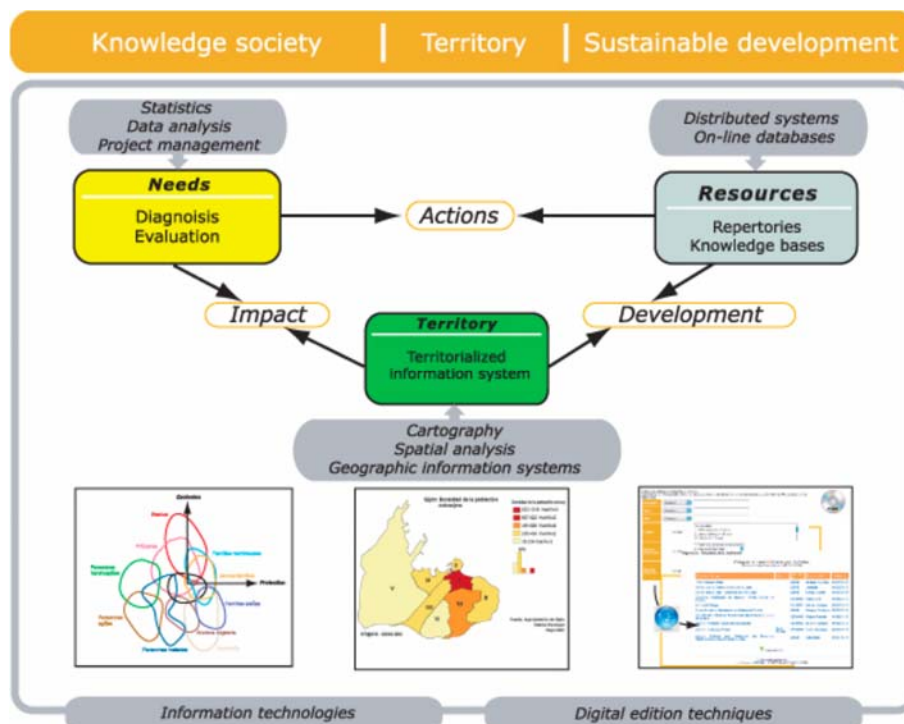


Diagram 7: Design of the CATALYSE method and tools

We considered then two additional specifications sets:

- The Catalyse « toolkit » harmonized and updated the tools, improved their accessibility and completed their documentation.
- The integration of the Catalyse tools within a territorial information system linking quantitative analysis, qualitative analysis and spatial analysis, in order to determine and compare the people's needs profiles and the services profiles within a context defined by territorial indicators.

The specifications of such a territorial information system essentially depend on a methodologic and technical logic. Statistic analysis, data analysis and spatial analysis also have their own generic processes. They are integrated within an information system that also has a broader generic process, from the data gathering to the information publishing, *via* cooperative space for analysis. These generic processes can also be defined step by step, independently from their application field and their uses.

During the caENTI first period, common specifications were drafted for:

- Data processing tools: Pragma for data gathering and quantitative analysis (deliverable 54), Anaconda and Nuage for qualitative multicriteria analysis (deliverable 55) and online repertory (deliverable 52)
- Contents information: guide of territorial diagnosis and services evaluation (deliverables 51 and 56), services repertory form (deliverable 52) and territorial indicators (deliverable 53)

New experimentations quickly started with the updated contents and tools and the modelling of the Catalyse method made decisive progress:

- The information contents became at least as important as the data processing tools.
- The uses specifications became more important than the technical guidance notes.

It concerned the three basic tools of the Catalyse method:

- The diagnosis and evaluation “guide” allows determining the inhabitants' needs and evaluating the services carried out to meet these needs.
- The services “repertory” allows evaluating the services in relation with the diagnosed needs.
- “Territorial indicators” give a spatial dimension to the comparison between needs and services.

The definition of harmonized information contents and tools specifications strongly mobilized actors and researchers at the European scale.

After the guide definition, the coordination group Wp6g drafted protocols that defined the data processing and the analysis process for each question of the guide, in the deliverable 56. These protocols were deduced from the generic analysis processes on the one hand, and from the actors needs and uses on the other hand.

The deliverable 56 also presents a diagramme of the Catalyse governance, integrating territorial cooperative observation tools within participative territorial partnerships.

Catalyse governance distinguishes the uses of partnership actors according to the needs of its instances or functions: steering committee, operational committee, workshops, projects groups, animation groups, etc. According to participation, actors uses became the starting consideration of the TICS modelling. caENTI considers information as a means for actors and community to understand the territory structures and dynamics and to act for sustainable development. It was the reason why we qualified the system of “territorial intelligence” one and not of “territorial information” one. From another point of view, protocols can allow automatizing data processing by the “intelligence” integration. We added the word “community” to indicate that the system user is the territorial community, even if in a first time the actors and the territorial partnerships more frequently use it than the whole community. The objective is the community become the system user. As a consequence, from “tools for actors” the WP6 object became “tools for, with and by actors”.

At the end of the caENTI first period, the main questions the WP6 had to solve were:

- Are information and their analysis tools accessible for actors?

- What kind of information and documents do the actors need to act and to better understand the territorial structures and dynamics ?

During the second period, two coordination groups drafted the specifications of:

- The integration of the guide within the European on-line Inclusion Itinerary Accompaniment File, that computerises a traditional professional tool of the medical and social sector (Wp6f, deliverable 57)
- Specifications for the (generic) processing and editorial chain from territorial data to results publishing (Wp6d, deliverable 58)

A coordination group that was not planned in the caENTI Declaration of Work was created during the conference of Huelva, in October 2007 to:

- Study the uses of the associated observatories
- Follow the caENTI experimentations
- Design a repertory of the territorial intelligence projects

### **2.7.1.3. Organisation of the coordination activities in the WP**

As mentioned above, the initial WP6 programming included three annual stages for the full duration of the project:

1. Harmonizing the Catalyse tools at the European level in the “Catalyse Toolkit”, during the first period (2006)

2. Defining the specifications of an online “Inclusion Itinerary Accompaniment File” (IIAF) with a system to process it, during the second period (2007)

3. Designing a specialized portal on European Institutional Territorial Indicators, EITI, useful for actors, that includes a Territorial Intelligence (Community) System (TICS), during the third period (2008).

As territorial intelligence tools are both information contents and data processing tools, three kind of tasks can be distinguished at every stage: contents selection, technical specifications and guidance notes about the joint use of contents and tools.

The European observatory of Elementary school has its own planning, that *a priori* corresponds to a mobilization task, a study of feasibility phase and an integration of the new participants of the European observatory project.

According to this organisation, the WP6 was composed by eight research coordination groups, all the three periods long.

During the caENTI first period, three coordination groups drafted common specifications for:

- Contents information: guide of territorial diagnosis and services evaluation (deliverables 51 and 56), services repertory form (deliverable 52) and territorial indicators (deliverable 53)
- Data processing tools: Pragma for data gathering and quantitative analysis (deliverable 54), Anaconda and Nuage for qualitative multicriteria analysis (deliverable 55) and online repertory (deliverable 52)
- Guidance notes to facilitate the use of the tools by actors, including the meanings definition and the analysis protocols (deliverable 56)

Wp6c [Contents], led by Celia SANCHEZ LOPEZ, UHU, defined the Catalyse toolkit contents at the European level. This coordination group was in charge of drafting the specifications (themes and questions) for a European guide of diagnosis and evaluation, by harmonizing the guides used by the different caENTI actors, between them and with the available European standards. Then, they deepened the guide contents meaning -themes, questions and their modalities - whilst taking into account the different national contexts. The Wp6c mainly included actors and academics who are experienced in the use of Catalyse.

Wp6p [Programming], led by Cyril MASSELOT, UFC, drafted the technical specifications of Catalyse tools. It was in charge of the adaptation of the processing tools PRAGMA, ANACONDA and NUAGE, as well as the territorial indicators systems (TiS), to use them in a way that will be conform to the guide specifications, by improving their accessibility as PC tools, and then as online ones. It was composed of engineers and academics specialized in data processing. Some were experienced in coding Catalyse tools or in the maintenance of such tools. It worked on the specifications concerning the data analysis tools. It had to gather conceptual and methodological specifications on the basis of the history of the Catalyse tools development and of the evolution needs expressed by the users. Conceptual and methodological specifications are useful to adapt the information form to the data analysis and processing conditions. They also drewed the framework required to define technical specifications that describe and arrange the tasks made by the tools. Then, they drafted data processing specifications that adapt the software to specific computer environment and development software for the techies who will code the software.

Wp6g [Guidance], led by Maria Jose ASECIO COTO, UHU, designed guidance notes for the use of the Catalyse tools. It was composed of actors and academics experienced in the use of the Catalyse tools. It aimed at defining the meanings of the contents, the data analysis protocols and the use of the Catalyse tools within the framework of a development

partnership, in order to write out guidelines of the Catalyse Toolkit. It had also to gather, compare and synthetise information, but from this moment on its research activities concerned both the contents understanding and the use of the data analysis tools.

The Wp6c group, and then the three WP6 coordination groups, adopted a regional and linguistic organisation to harmonise the experiences, *via* a regional step:

- The University of HUELVA, ACCEM and VALDOCCO harmonized the Spanish contents. For the guide, a first Spanish digest, called “guion” or “migrant's guide”, was suggested by ACCEM that animates a national wide network of migrants observatories
- OPTIMA and INTEGRA harmonized the “Walloon” guides, with the University of LIEGE.
- In France, ADAPEI and COCAGNE, with the University of Franche-Comté help and the EQUAL “MEDIATION” project contribution harmonised their guides.

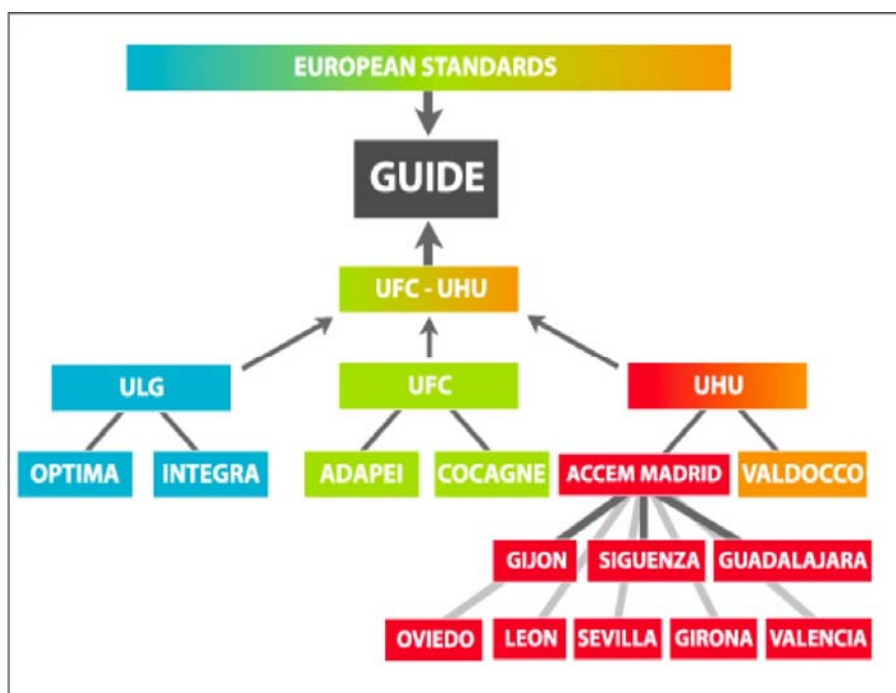


Diagram 8: European harmonization of the CATALYSE tools

During the second period, the WP6 started integrating the Catalyse tools and facilitating their access on Internet.

Wp6f [IIAF File Contents] led by Maria Jose ASECIO COTO, UHU, defined the contents of the Inclusion Itinerary Accompaniment File (IIAF). Its first operational objective was to define the specifications of a broader document than the European diagnosis and evaluation guide, to gather individual information on the users of human services. The concerned document was the online individualised Inclusion Itinerary Accompaniment File, that we will call the “file” for the sake of simplification. As digital documents, the file allows

a better individual follow-up, the individual project elaboration and the user's inclusion itinerary evaluation by a multi-sector and multi-professional team of stakeholders.

Wp6d [IIAF Development] led by Cyril MASSELOT, UFC, drafted the specifications for the processing and editorial chain from data to results. It also began the integration of the Catalyse software in an online system that was designed in 2006 with a first definition of the TICS.

For this harmonization process too, we used an organization based on regional and linguistic partnerships.

The two groups prepared the specifications for the TICS complete modelling, which included a prototype of a European portal on institutional territorial indicators available on Internet in Europe, during the third period :

Wp6i [Indicators portal] led by Guénaël DEVILLET, ULG, selected online territorial indicators at the European level from the results of the Wp4i coordination group on territorial information accessible on European portal and national statistical socio-economic websites. It allowed identifying the data available on Internet, as well as the cost of the statistical data available under a digital shape and that can be spatially represented. These data were gathered by the team of the University of Liege, which underlined the implementation difficulties and the need of a European standardization of the distribution means. The team of ZRC ZAZU set up the basic elements of the mapping representation interface and develop the webmapping system. The team of the University of Franche-Comté set up the data-processing systems allowing an effective storage and undertook a reflection on the metadata. They are, on the one hand linked to the indicators (construction, definition, calculating method) and, on the other hand to the data (gathering date, processing, harmonization). The metadata linked to the space representation were also suggested (shapefiles preciseness,...).

Wp6s [TICS] led by Cyril MASSELOT, UFC, defined the specifications for a Territorial Intelligence Community System that includes the European portal of territorial indicators.

A TICS is a territorial information system used by a partnership of territorial actors that wants to develop democratic governance for sustainable development. It favours the information sharing within a territorial development partnership. It instruments the data cooperative analysis and the results participative interpretation. It introduces the citizens'

participation within the decision-making process. It provides to the actors the useful information to draft projects, and then to manage and evaluate them.

The drafting of specifications followed the four TICS integration axes. After:

- The data integration process of the processing software.
- The management and edition of the documents produced during the analysis

The following research activities concerned:

- The analysis protocols of the different kinds of information, with a detailed description of the protocols for each question
- The system adaptation to the specific needs of the multi-sector development partnerships

The software integration progressed much. The “Catalyse community” offers download and documentation functionalities. The Catalyse Content Management System suggested a first TICS.

The Wp6s described the main input and intermediary documents. It started making data modelling and suggested a metadata system.

It described the protocols main phases and stages and the detailed protocols for each guide question.

After a first evaluation of the Catalyse tools, the wp6s drafted a guide of userecommendations. It also initiated the systematic description of the Catalyse observatories and designed a online repertory of territorial intelligence actors.

During the three periods, the wp6e [OES], led by Yves ALPE, OER/UNISA, made a comparative feasibility study of a European Observatory of School.

The objectives of the coordination activity “European Observatory of School” were to study the transferability to the other European countries of the method experimented in France by the observatory of rural school. It consisted in following a students troop to evaluate the specificities of the territorial impact on success, knowledge of the territories and of their links with school, social territory representations and mobilization of the local actors. It also implied to evaluate the accessibility conditions to the information about the students, the schools and the territories in the different countries, and to determine the relevant criteria to get a European comparative approach. Since 1999, the Rural School Observatory studied a 2400-student troop that went to school in different French regions and different kinds of rural

environments, to better know the success factors and the links between the students' projects and their life territories. The database constitution resulted from surveys that were diffused to the students, their parents, their teachers and on information that were got from the official examinations services. The Catalyse methods and tools are used to process data, but also to promote a participative approach.

The WP6E fundamental questionings are linked to the relation between the students' life territory and school territory and the school success. Another questioning concerns the fact school does not operate in a closed environment and many school structures implement opening devices towards their economic, social and cultural environment which impact should be measured.

The European Observatory of School uses again the general principles that have guided the work of the Observatory of Rural School for more than ten years: multi-disciplinary research team and network functioning on remote sites, under the scientific responsibility of the Laboratory ThéMA of the University of Franche-Comté.

The methodology is based on the analysis and interpretation of the school follow-up of significant samples of pupils from different kinds of geographical environments. The information come from surveys made with the pupils, their parents and their teachers, their entire curriculum long. Other information with a contextual nature are gathered, especially on the opening strategies that are implemented by the schools, on the pupils' life territory, on the cultural practices...

All these information feed a database that is made and processed according to the Catalyse methodology and with its new online tools.

This methodology implies a permanent link between the field actors that help gathering information and the researchers who transform them into data and process them. The actors are solicited to participate to the interpretation of the data processing results. At the end of the chain, there are results that can influence their practical use.

84 researchers and territorial actors participated to the research coordination activities, more the persons involved in these activities.

- Yves ALPE, leader WP6s, faisability of a European School observatory, OER and UNISA
- Maria Jose ASENSIO COTO, group leader of "wp6g" guidance notes and then "Wp6u" uses, UHU
- Marie-Pierre BACCON, socio-economic engineer, quality specifications, Réseau des jardins de COCAGNE

- Enrique BARBERO RODRIGUEZ, assistant manager, ACCEM
- Outaile BENHABID, territorial responsible of the Catalan centers and observatories, ACCEM
- Jonathan BENILAN, computer science engineer, jPragma development, LIFC, UFC
- Christophe BREUER, researcher on territorial information, SEGEFA, ULG
- Emmanuelle BRUNETTI, researcher on territorial information and Catalyse evaluation, ULG and Optima
- Braulio CARLES BARRIOPEDRO, territorial responsible of Castilla La Mancha centers and observatories, ACCEM
- Pilar CARLES BARRIOPEDRO, psychologist, Castilla La Mancha observatories, ACCEM
- Julien CHARLIER, researcher on territorial information, SEGEFA, ULG
- Clara COLLADO, projects and centers coordinator, ACCEM
- Concetta CUSUMANO, responsable of the animation team observatory OPTIMA
- Sylvie DAMY, computer science lecturer, co-leader wp6i group, computer science modelling, database and metadata, LIFC, UFC
- Jean-Marie DELVOYE, director of Optima observatory, follow-up of Chapelle-lez-Herlaimont experimentation
- Guénaél DEVILLET, director of the SEGEFA, wp6i group leader, European portal of territorial indicators, ULG
- Jean-Louis FAUGUET, researcher in the School observatory, UNISA
- Julia FERNANDEZ QUINTANILLA, ACCEM manager
- Csilla FILO, leader of WP4, PTE
- Maria Isabel FRANCO LIGENFERT, director of the Fundacion VALDOCCO
- Jean-Pierre GABRIEL, socio-economic engineer, INTEGRA Plus observatory
- Maria del Carmen GANAN LAUREANO, socio-economic engineer, Fundacion VALDOCCO observatory
- Lourdes GARCIA FUERTES, coordinator of the Leon observatory, ACCEM
- Violeta GARCIA LORENZO, Erasmus master student, UHU
- Carmen GARCIA SAN MARTIN, psychologist, Leon observatory, ACCEM
- Encarna GARCIA SAN MARTIN, territorial coordinator Leon center, ACCEM
- Jean-Pierre GIMBERT, responsible of service, ADAPEI
- Jean-Jacques GIRARDOT, WP6 leader, Tools and TICS specifications, UFC
- Isabel GONZALEZ MAHE, coordinator of the ACCEM observatories network
- Juan Ignacio GONZALEZ ORTA, Erasmus master student, UHU
- Anne GRIFFOND-BOITIER, lecturer in geography, mapping tools, UFC
- Empar GUERRERO, territorial coordinator of the Valencia center and observatory project, ACCEM
- Mercedes GUZMAN, coordinator of Sevilla observatory, ACCEM
- Ahmed HAMMAD, lecturer in computer sciences, databases modelling, UFC
- Coralia HANDREA, lecturer in sociology, participative observation, UAB
- Jean-Guy HENCKEL, general manager, Réseau des Jardins de COCAGNE
- Oscar HERNANDO SANZ, coordinator of the Opasi Siguenza observatory, ACCEM
- Bénédicte HERRMANN, lecturer in computer science, WP6s group co-leader, computer science modelling, database and metadata, LIFC, UFC
- Isabel HEVIA ARTIME, researcher in the Odina observatories, ACCEM
- Ioan ILEANA, Professor of computer sciences, software integration, UAB
- Pierrine JEUDY, computer sciences engineer, ADAPEI observatory

- Zoltan KÁDÁR, Ormansag observatory animator, BARANYA
- Marion LANDRE, researcher on web-mapping, GIS and mapping, MSHE, UFC
- Liliana LOPEZ, socio-economic engineer, Sevilla observatory, ACCEM
- Fang-Yie LEU, Professor of computer sciences, software integration, THU
- Javier MAHIA CORDERO, director of observatories and territorial coordinator of Asturias, ACCEM
- David MARQUEZ, coordinator of the Opegu Guadalajara observatory, ACCEM
- Marisa MARTINEZ GONZALEZ, coordinator of Gijon center and observatory, ACCEM
- Concepción MARTINEZ MARTINEZ, responsible of the GEYSA observation system, VALDOCCO
- Javier MARTINEZ SANDOVAL, computer science engineer, ACCEM
- Cyril MASSELOT, Wp6s group leader, ICT and TICS specifications, UFC
- Florence MASSON, computer sciences engineer, observatory OSUA, ADAPEI
- Thomas MOREL, student in applied language Master (training period), UFC
- Antonio MORENO MORENO, computer science engineer, detailed protocol of the TICS, UHU
- Alejandro MORENO YAGUE, coordinator of the Opegu Guadalajara observatory, ACCEM
- Jean-Pierre MULLER, director of ADAPEI
- Kristof OSTIR, researcher on web-mapping and GIS, ZRC ZAZU
- Raquel PALACIO TORRE, coordinator of the Oviedo center and observatory, ACCEM
- Mihai PASCARU-PAG, associate professor of sociology, participative territorial partnerships, UAB
- Caroline PASTORELLO, socio-economic engineer, INTEGRA plus observatory
- Peter PEHANI, researcher on web-mapping and GIS, ZRC ZAZU
- Eddy PETIT, engineer, Catalyse community development and online documentation, MSHE, UFC
- Anne PERETZ, socio-economic engineer, ADAPEI observatory
- Gabor PÓLA, Ormansag observatory responsible, BARANYA
- Marc-Emmanuel RAMAGE, computer science engineer, Anaconda 2.2 and eAnaconda development, LIFC, UFC
- Jérôme RENARD, computer science, UFC
- Jean-Marc RIGOLI, evaluation coordinator, Réseau des Jardins de COCAGNE
- Christiane RULOT MARECHAL, INTEGRA Plus observatory manager
- Manuel SANCHEZ, territorial director of the Andalusian centers and observatories, ACCEM
- Marta SANCHEZ, coordinator of Girona Observatory, ACCEM
- Celia SANCHEZ LOPEZ, wp6c and then wp6u group leader, information contents uses, UHU
- Ana Belen SANZ CERESO, coordinator of Siguenza center, ACCEM
- Domenico SARNO, researcher in the school observatory, UNISA
- Isabel STIEVENART, responsible of the observatory OPTIMA
- Rémi THOMAS, computer science engineer, ePragma development, MSHE, UFC
- Giovanna TRUDA, researcher in the school observatory, UNISA
- Aurore URBANO, socio-economic engineer, follow-up of the Chapelle-lez-Herlaimont experimentation, Optima

Other engineers and techies who worked in the caENTI observatories were involved in the WP6 research activities. Other people who belong to external partners, as the coordinators of Chappelle-lez-Herlaimont (Laurence MEIRE, Carinne DE NOOSE and Eric BERNARD) and the VTDESIGN engineers (Éric BINETRUY, Émilie GIELER and Aurélien SEGUIN, who developed the OSUA system of ADAPEI) also participated to this work.

#### **2.7.1.4. Coordinations activities: meetings, seminars and participation in conference**

##### **Kick-off meeting in Besançon (France, 24-25/03/06)**

This meeting initiated the exchanges on CooSpace.

##### **Cross seminar WP4-WP6 in Durbuy (Belgium, 29-30/06/06)**

During the scientific coordination meeting of DURBUY, on June 29<sup>th</sup> and 30<sup>th</sup> 2006, all the **WP6** members met for the first time. It represented about 25 people, including some WP4 members. This meeting aimed to create cross activities at the territorial indicators level.

It introduced a first version of the European guide and a first proposal of services repertory prototype. A link was established with the WP4I on territorial indicators. On the following day, the WP4I meeting established the principle of jointly working to choose twenty indicators so as to compare the guide important questions.

During the meeting of DURBUY, the caENTI consortium also started drafting the CATALYSE guidance notes, with contents definition and protocols. The WP6 started following the experimentation of the ACCEM "migrants" guide. It introduced the topic of the the CATALYSE participative uses within a partnership. The wp6g agreed on the fact each territorial actor would draft a tools use history and recommendations. This work will continue on a specific forum on CooSpace.

On the meeting second day, the participants discussed the first proposal of themes and indicators and chose 4 themes: people, socio-economic conditions, employment and housing.

##### **WP4 and WP6 scientific coordination meeting in Aix-en-Provence (France, 4-5/07/06)**

This scientific coordination meeting allowed the WP6e (Rural School Observatory) defining its objectives, its work phases and its preliminary issues. Besides, it debated on the feasibility study of the European Elementary School Observatory, on the basis of the French

experiment. The group objectives were to lead research on the information about school itineraries of the elementary school pupils, analyse the links between school and community in a local sustainable development prospect and focus on the educational inequalities linked to territory. In addition to these three objectives, there is also a caENTI transversal objective: working on the tools appropriation by local actors and on the actors and tools nature.

The feasibility study phases will be: mobilisation, feasibility and integration.

### **International conference of territorial intelligence in Alba Iulia (20-22/09/2006).**

During this meeting, the participants mainly decided to fusion the wp6c and wp6g coordination groups into the wp6g, in order they work together on:

- Achieving the meaning first definition of the European questions,
- Synthesizing the data analysis and data processing protocols of the latest diagnosis participants observatories made,
- Gathering the stories retracing the main stages of the observatories development and the mechanisms description, so as to compare uses and to elaborate recommendations.

A specific workshop was dedicated to the wp6 progress and prospects during this conference. Celia SANCHEZ presented the European guide specifications with the meaning definitions. Besides, papers presented the WP6 research activities.

### **Conference in Salerno (Italy, from 8 to 12/05/07)**

The University of Salerno organized a conference on “Territorial intelligences, regional identities and sustainable development”. The caENTI members could present papers on their research actions within the territorial intelligence framework from the May, 8<sup>th</sup> to th 10<sup>th</sup> 2007.

On May the 12<sup>th</sup>, a wp6e workshop made a critical examination of the Rural School Observatory experience, focusing on its interests and limits and on the Catalyse tools uses. Then, the participants though the requested information to develop of a European School Observatory, concerning as general data as school, territory and community. Lastly, the observatory organisational modalities were defined, as regards actors, uses, information souces and the database itself.

### **WP6 scientific coordination meeting in Madrid (Spain, 22 and 23/03/07)**

This meeting was an occasion to talk about the specification drafted in 2006 state and about the developed tools: guide, repertory, territorial indicators selection, software, guidance notes on meanings and protocols. We mainly debated on these tools publication.

Afterwards, we debated about the Catalyse toolkit, file and about the software integration within the editorial chain specifications. Besides, during this scientific coordination meeting the WP6 programmed all the activities and tasks until the conference of Huelva in 2007.

Another evoked sujet was the evolution of the ACCEM observatories network and the creation of observatories. The ACCEM network was reorganizing and its animation was reinforcing.

The seminar participants identified the actors that have an internal information system and that wanted to participate to the research on the file, it was the case of Accem, Adapei and Valdocco.

#### **WP and coordination groups leaders seminar (07 and 08/09/07) in Besancon**

During this leaders meeting, the participants evaluated the progress of the preparation of the conference of Huelva 2007.

#### **International conference of territorial intelligence in Huelva (Spain, 24-27/10/07)**

During the conference of Huelva, one workshop was dedicated to the WP6. Prepared by several workshops before the conference, it aimed to present its progress and prospects.

During this scientific event, the participants essentially programmed the tasks to do concerning the file and the editorial chain specifications and reports and the tasks regarding the TICS specifications at the software, documents, protocols and uses levels.

The participants to this meeting also programmed the software development (on cross platform and online version) and the articulations between data and spatial modules on a unique database.

Besides, a wp6u (“Uses”) work group was created to follow experimentations and to draft the specifications of an online repertory of territorial actors, starting from the Catalyse observatories.

#### **International Conference about “Education and territories” in Digne (France, 29-30/11/07)**

The follow-up of a group composed by 2400 pupils during the secondary school period led to the creation of an important database. When its processing were complete, the OER members decided to organize a conference in order to compare the reached results with the studies led in other places, especially abroad.

This conference gathered 82 people, including 16 foreigners. There were 31 oral communications, divided into 4 thematic workshops. This scientific event deepened the thinking about territorial contexts. The foreign researchers' mobilisation notably improved the exchanges quality.

#### **National Meeting in Vesoul (France, 11-12/12/07).**

The thematic structure of this meeting about « **Educational policies and rural territories** » corresponds to the research focus that has been developed by the OER for ten years in the European school observatory .

#### **Coordination meeting about uses in Liege (Belgium, 14-15/02/08)**

This meeting was devoted to the evaluation of the Catalyse method and tools use within development partnerships. It was prepared with a form and a sythesis report written by OPTIMA, Intégra Plus and the University of Liege (ULg). Then, the group decided to draw a broader form that would allow making a scientific analysis of the observation uses by actors and development partnerships.

The ULG presented the progress of the European territorial indicators portal.

Information were given about the TICS specifications results and planned tasks.

#### **WP4 and WP6 Conference in Pécs (Hungary, 29-31/5/08)**

This WP4 annual meeting and the conference about “Regional information, methods and uses of indicators and tools” that accompanied it were an occasion to talk about the European territorial information portal, to present scientific papers and to have cross exchanges, especially on uses with the WP5. Indeed, a convergence with this Work Package concerning some topics was decided during this scientific event.

#### **WP6 workshop in Besançon (France, 26- 27/06/08)**

During this seminar, the main issue was the preparation of the annual international conference of Besancon, through the presentation of articles to be improved in the conference prospect. This seminar allowed evaluating the WP6 work progress and programming the

remaining tasks to be made until the conference of Besançon. Besides, the participants defined the results to be presented under a paper or a demonstration shape during the major annual event of the caENTI consortium.

#### **Workshop webmapping in Ljubljana (Slovenia, 4-5/09/09)**

This meeting aimed to reinforce the integration between the Wp4i coordination group and the Wp6i coordination group. They drafted together the specifications of the European territorial indicators portal. Besides, the Wp6i presented the prototype of the web mapping portal and we evoked new topics: intellectual property rights and metadata.

#### **International conference of territorial intelligence in Besançon (France, 15-18/10/08)**

During this event, five workshops were devoted to the presentation of the WP6 conclusions about tools, with a workshop concerning demonstrations, another concerning the European territorial indicators portal, a third one about TICS and uses and two workshops presenting all the territorial actors experiments. Scientific contributions were presented on each topic, what gives an overview on the deliverables drafting.

Besides, during the conference, the participants programmed the WP6 final deliverables drafting.

##### **2.7.1.5. Joint or cross activities with others WP- Organisation of the coordination activities in the WP**

WP6 directly worked with WP4 in the specifications for the European portal of territorial indicators. WP6 and WP5 converged on the uses topic and finally worked together on the repertory of territorial intelligence actions. The Wp3 was very involved to develop the online community and documentation, and to coordinate the integration of the tools into the territorial intelligence portal. WP6 was also very implicated in the Besançon conference scientific and logistic organisation.

##### **2.7.2. Workpackage 6 TOOLS progress toward objectives**

As said before we will present successively progress on information contents, software tools and use.

Then we will present the specifications for the Territorial Intelligence Community System that is at the convergence of this three axes.

At end we will present the progress on the faisability of a European observatory of school.

### **2.7.2.1. Progress on information contents**

#### **2.7.2.1.1. Progress on contents specifications (wp6c) – Group leader Celia Sanchez Lopez (UHU)**

The objective of this group was to elaborate the specifications for the Catalyse content tools : the guide of diagnosis and evaluation, the services repertory and the territorial indicators, following the experience of Catalyse observatories, on the one hand, and of European standards, on the other hand.

The guide of diagnosis and evaluation is the basic tool of the CATALYSE method. The European Guide de Diagnostic and Evaluation present a particular interest within the CATALYSE territorial intelligence tools.

The guide is the diagnosis that allows gathering people's needs, to which then are confronted the supplied services to satisfy them, as well as the territorial indicators. So, the guide contents have effects on the services repertory contents, as well as on the contextual indicators choice. A selection of the guide questions can be confronted to the territorial indicators.

The first proposal was made by Celia SANCHEZ LOPEZ who made a synthesis by harmonizing the guides that are used by OLE, VALDOCCO, ACCEM, OPTIMA, INTEGRA, ADAPEI and the original pattern of the CATALYSE method that is the MOSAIQUE guide. This work led to scientific coordination meetings between the UFC, the UHU, VALDOCCO and ACCEM, to harmonize the Spanish guides on the one hand, the Universit y of LIEGE, OPTIMA and INTEGRA to harmonize the Walloon guide on the other hand. On the Spanish side, all the guides of the ACCEM migrations observatories, that is to say the national observatory that is called GORRION and the local observatories of GIJON, OVIEDO, LEON, SIGUENZA, GUADALAJARA and SEVILLA, were harmonized in a “CATALYSE MIGRANTS” version that preceded the European guide. In parallel of this work of internal harmonization, Celia SANCHEZ LOPEZ, also harmonized the guide questions and modalities with the European standards formulation.

This first proposal was subjected to discussion in the Coospace until it was consensus for all the territorial actors participating in consortium CAENTI. The contents of the guide was finally organized in several blocks of questions: identification, project and territorial

information, reception, personal and family data, housing, health context, autonomy, employment and evaluation.

Wp6c also specified with wp6p the information of the services repertory and of the Territorial Information System starting from, on the one hand, the guide contents and, on the other hand, from the repertories comparison of the observatories of Odina (ACCEM, Spain), Opasi (ACCEM, Spain), OPTIMA (Belgium) and INTEGRA (Belgium).

Wp6c cooperated with Wp4i to choose territorial indicators on the basis of a questions selection of the guide interesting contextual comparison. The WP4I aimed at coordinating in work package 4 a comparative research about the public territorial information available on Internet at European and national levels. The selection of territorial indicators showed the difficulty to make local comparison using the guide.

**2.7.2.1.2. Progress on specifications for an European on-line Inclusion Itinerary Accompaniment File (IIAF, Wp6f) - Group leaders: Jean-Jacques GIRARDOT (UFC) and Celia SANCHEZ (UHU)**

The accompaniment file is a traditional tool used to improve the quality of human services. Information it contains must be useful for the person's multi-sector accompaniment, by many accompanying stakeholders. This coordination group drafted the main specifications of the file, and its structure to manage the individual follow-up, on the one hand, and global diagnosis and evaluation with structured indicators, on the other hand. In the file, the guide is always useful; it gathers the individual multi-sector indicators needed for territorial observation.

The file is an important support for human services adapted to the new context of the territorial governance and powered by ICT. It is used in sanitary and social institutions, inclusion or insertion institutions, reception and migrant's integration services, for actors in the fight against poverty and vulnerability, etc. It interests the public administration, as associative or private local actors, who both work more and more often in multi-sector territorial networks and are stimulated by ICT possibilities.

Stimulations happen within the framework of the governance development that is linked to economic and political trends of the economic and social crisis that began in the 70's. It has caused at an economic and social level, the stop of the industrial growth, mass unemployment, the fragilisation of social protection systems, the increasing of poverty, precariousness and marginalization. It marginalized social groups and some regions were affected by the industrial recession. Unemployed people, households with insufficient

resources, homeless persons, alone people, handicapped, diseased and aged persons without resources were called "new poor persons", or "fourth world". They make the number of persons dependent on social and charity aids quickly grow up. Assistance plans and intervention methods evolve what involve a transformation of the file, which must be adapted to the description of more complex and diversified situations.

The crisis led to the change of governance methods, characterized by the decentralization of decision-making processes. Within this context, the accompaniment file, which is traditionally a document used for collecting and preserving information necessary to accompaniment, knew a renewal of interest, what strengthened the CAENTI project for determining the specifications of this file based on its partners backgrounds and the new issues that this document involves. Since several years, some CAENTI partners have developed computerization projects for the file in order to facilitate its use by stakeholders coming from many sectors: PARADA, then the OSUA system, implemented by ADAPEI since 1997, GORION system developed by ACCEM that recently cooperate to the national project SIRIA. VALDOCCO and COCAGNE also experimented such systems. So, to define the specifications of the file we followed the same synthesis process we used in the first period for the CATALYSE guide.

Wp6f adapted the traditional structure of the file according to ICT: file, guide and observation form.

Thanks to the ICT, the file should be the support of multi and interdisciplinary, multi-sector and multi-professional practices.

Four types of considerations generally surround the file, that are detailed in the deliverable 57:

- The improvement of the human service quality, which implies a symmetric relationship between the accompaniment team and the person.
- - The respect for the human right and the private life; the law generally asserts the user's right to access to all information and documents concerning him.
- The information sharing between accompanying agents that is subjected to professional secret.
- The using of the file for the evaluation by the development partnerships and for territorial diagnosis, which can be done only in an anonymous form and respecting the law about digital database.

The online file suggests more ambitious objectives than the guide, as for individual use, as for global one.

It is a *digital document*, which is liberated from the constraints imposed by a paper support such as for the guide. Its size is more limited by the capability to *construct a common language* than by the time. The *arborescent structure* of the file allows another time management *for optimizing the time of gathering* in comparison with the linear structure of the guide. It also resolves the data repetition by *the management of iterations*.

At last, the file feeds a *unique shared database* that allows *real-time control and processing*. The online file is really a cooperative tool, which can be simultaneously fed between many distant users. It allows a regular collective user's *paths follow-up*.

As so as the guide, the file that is originally a tool for individual diagnosis and evaluation can be used for global diagnosis and evaluation. Files can be grouped for global diagnosis and evaluation at various levels. Nevertheless, all the individual information can not be extracted from the file and it is not useful for a global use. It is necessary to implement in the file an “observation form” which gathers useful individual indicators for the achievement of diagnostics and evaluations on various lots of users.

This form has the same purpose as the guide but it contains more information. These individual indicators have to be structured, documented and kept in a form, which allows mobilizing and analyzing them easily. Useful information for the analysis of projects relevance and usefulness and of actions efficiency, effectiveness, cohesiveness and impacts, must be present in this form, like indicators required by the projects funds.

Finally, the **guide** gathers a minimal set of multi-sector indicators necessary for the diagnosis and evaluation at **territorial** level.

The **form** refers to a broader set of indicators, and deepens beyond the guide indicators specific to a **service**, a theme or a public.

The file includes common specifications of the guide that were updated from the deliverable 56. Within the file information, the form, which includes the guide, is a space of structuring and formalisation for individual indicators intended for global observation. They both depend on constraints inherent in the data quality, the processing, the data analysis and the spatial analysis. The experimentations led with the CAENTI observatories allowed determining recommendations for the evolution of the guide. Wp6f updated the specifications concerning the indicators of the form from the deliverable 54 and from the experiment of OSUA and SIRIA systems, respectively by ADAPEI and ACCEM.

The structure of the guide is not modified after its inclusion as core of the form. Some changes characterize the guide:

- The guide can be reduced to the indicators of territorial interest
- The file now gathers the personal information for the management of identification, the individualized diagnosis and the evaluation of the individual path.
- The services useful for the person should constitute a part in order to be compared with services repertory for the territorial evaluation of human services, in terms of relevance and localization.
- The same indicators, considered from the point of view of accomplishments should also be determined in the section evaluation.
- Because of the guide territorial orientation, the individual indicators comparable to territorial contextual indicators must also be gathered in the guide.

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sont requis pour visionner cette image.

*Diagram 9: contents articulation of the guide in the file*

The form completes these indicators with a series of specialized blocks according to the main categories of human services.

The specifications particular to the file result from, on one hand, the fact that the file concentrates personal information protected by the professional secret and, on the other hand, new possibilities offered by the digital characteristic of the file.

- The management of access rights protect the personal information
- An intervention form makes distinct the file from the guide.
- Synthesis variables are important elements for the modeling of processing protocols.
- Iterative loops repeat a series of questions as many as necessary

- The arborescent structure where only relevant and useful questions related to the situation of the person are asked.
- These two last specificities are related to blocks of questions.

The form is composed of thematic blocks. However, the block notion does not involve a thematic reference.

The accompaniment file is a tool used to improve the quality of human services. Information it contains must be useful for the person's multi-sector accompaniment, by many accompanying stakeholders. It involves the participation and the agreement of the person about information gathered, completed and updated throughout the person's accompaniment. The content, the access conditions and the accompaniment file use must respect the law in effect.

As a multidimensional tool for accompaniment, the file has acquired an important extension in comparison with our initial project.

The file management is made by an information system. We will now study the functions that are linked to the file processing in the Territorial Information Community System. The file structure will help you to manage the functions of individual accompaniment, and the ones of global diagnosis and evaluation involving the gathering of individual indicators about users' groups in an anonymous form, at service or thematic level with the form, at territorial level with the guide.

These whole specifications, which most part aims at improving the automation of individual indicators analysis, will be developed by the wp6s coordination group whose objective is the modelling of territorial intelligence community systems.

#### **2.7.2.1.3. Progress on European territorial indicators portal ( Wp6i) - Group leader: Guénael DEVILLET (ULg)**

The use of contextual territorial information constitutes an important precondition to the implementation of certain projects. The analyzes of the existing data makes it possible to put forward certain difficulties encountered within the territory, directs the strategies and contributes to bring coherence to the actions. All the good practices concerning the installation of social or economic development strategies preach moreover a preliminary phase of diagnosis to identify with relevance the fields in which to act.

In order to conclude this big step, the actors of the development, and more particularly the local actors, are constrained to collect information near various suppliers. Their use

depends largely on their accessibility, which includes the availability of the data and their cost.

On a European scale, obtaining territorial information is confronted with the multiplicity of the data suppliers, who makes more expensive and less efficient the data acquisition, and especially makes it more difficult to get a clear comprehension of the territories and of their dynamic.

The aim of our project was to create a tool of assistance for the management of these data, at the attention of the local actors. The concretization of this project requires many theoretical and technical reflections for the development of the tool which has to be usable for territorial actors.

### **Territorial information**

Territorial information is information for which the spatial component is important, it is possible to underline a covariance of the values of this information according to the position. Territorial information thus has a broad field of acceptance, a contrario of the term of indicator which gives specifically, and by definition, an indication on a situation of development considered as positive or negative.

An **Inventory of socio-economic and environmental information** undertaken between 2006 and 2007 concerning the European contextual indicators aims to inventory those and characterize their accessibility.

In the framework of the CAENTI project, information must necessarily be available for spatial entities at a lower level than the countries. Statistically, that corresponds to the European levels from NUTS 2 to LAU 1. The information distributed by the international agencies are limited to level NUTS 0 (country) is thus not very relevant for a later use. The only supracommunal institution disseminating contextual information with regional or infraregional scales is the Office of the Statistics of the European Union (EUROSTAT), which diffuses data for territorial cuttings from NUTS 1 to NUTS 3 widely and for free.

This platform is however confronted with various problems. Our research showed that the availability of the data is variable according to the country considered and the required year. This fact makes complex the comparative analyzes and makes null and void any certainty about the data availability. Moreover, if the major indicators are indeed present on EUROSTAT (population by entity, rate of unemployment...), others are lacking or need to be calculated, what is a complex task for many local actors.

The exploitation of the national statistical sites is thus necessary, on the one hand, to have the data at the local level (for example communes), and on the other hand, to supplement the offer of service proposed by the European Office of statistics. It has to be noted that the local actors cannot do without the national distributors in the local data retrieval. At best can they be helped by public, parapublic or associative observatories, which also collect data. These sources asked the question of the harmonization of the protocols of data processing between statistical levels on the one hand, and contiguous space entities having different statistical organizations on the other hand. In fact, the definition of the indicators can differ between certain countries.

Then we defined a **selection of indicators**. The indicators are virtually infinite: innumerable elements can be highlighted thanks to the construction of indicators based on population statistics. Their role is to give an account of a situation and to simplify the information by synthesizing it, by allowing a better communication and by authorizing cartographic comparisons. The selection operated in the indicators within the framework of the CAENTI project meets these objectives while taking into account the indicators flexibility constraints, their ability to be transposable, to adapt themselves to the inconsistencies and to the lack of the data at the European level.

The problems were treated under the angle of the complementarities of the method CATALYSE, which makes it possible to confront the needs of the populations with the offer of the proposed services, by taking into account the socio-economic environment. To reach this aim, the method uses three types of data: the data concerning the needs for the populations obtained via a questionnaire, the offer of services (via lists) and finally the socio-economic and environmental data in order to describe the environment. On the basis of a selection of 44 questions of the evaluation and diagnosis guide, 15 territorial indicators were highlighted. They can illustrate 20 selected questions of the guide.

The **portal of indicators** took the structure of a **webmapping system**, according to the relevance of cartography for representation

The cartographic representation was privileged to allow a better legibility of information, the comprehension of the space disparities and the possibility of comparison with other areas. All in all, although the reading of maps is not acquired for all, it is a powerful communication tool.

But the representation of the indicators needs a relevant territorial scale to spatialize the collected data. It is important to recall that the great diversity of the actors being able to use the method CATALYSE inevitably makes the search for a relevant territory complex. In fact, certain associations deal with restricted districts whereas others work with the national or regional scales, what has consequence on the scale of the indicators representation. Moreover, each relevant territory for an actor will require a higher reference level allowing the comparisons for example with the regional, national or european levels.

In the framework of the caENTI project, the communal level seems to be a basic level both for the administrative (action) and statistical data. In addition, at the communal level, the majority of the European countries have statistics for the various indicators. The definition of the communes through the countries of the European Union seems to be compatible with the research of a basic level, although this one is not perfect. This basic level should not make forget that the majority of the actors, in particular those which work on a city or district scale, must have more precise data than those on a communal scale to highlight in a relevant and dynamic way, disparities or priority areas of actions.

As regards the **protocol of treatment**, various treatments and protocols of comparisons of the territorial indicators are used by the actors in very different situations and contexts. Some general remarks can be made concerning the mode of representation of the territorial indicators, and taken into account at the time of the realization of the tool of visualization for territorial actors.

It is not an easy task to collect the same indicator characterizing a single topic in various countries. That is particularly true for the indicators relating to health, the education or the legal statute of the people belonging to the same group (households, cohabiting). Nevertheless, these indicators remain in their compositions mainly close. They can thus be mapped on a single principle. In order to avoid the user errors, it is necessary to refer to the metadata during the information diffusion: each user must have the calculating methods and the terms definitions for each indicator and each country. The experiments (European projects) show that the harmonization of the data between the countries is a task which cannot be done by a project such CAENTI.

The **data-gathering of shapefiles and indicators** is a crucial step in the realization of the gate of territorial information: without those, it is obvious that the project does not have substance. In order to carry out cartography of the indicators or data, two types of files are

necessary: on the one hand, data to be represented, and on the other hand, a file representing spatial cutting in entities (communes, country...). It is within the entities of the latter that the values of the indicators will be represented.

For *contextual data* the difficulty of information collection appeared as soon as we start using the files resulting from EUROSTAT. As proposed previously, EUROSTAT mainly collects furnished information with thirds (national institutes...), which generates information gaps within the databases. In this case, it is sometimes necessary to use older years under review, by taking into account the dynamics of constitution of the European Union and thus the disparities of information for the countries integrated more recently. Moreover, certain indicators of the European Office for Statistics are named in an unsuitable way, or by creating a confusion: indicators which seem acquired can appear to be not very relevant according to their method of calculating.

On the level of the national suppliers, it is the multitude which increases the difficulty of obtaining the data. Acquisition can moreover be expensive for certain very small spatial levels (for example for the communes in France and for the statistical sectors in Belgium). It is indeed necessary to take into account the number of countries and the number of entities which gear down the costs of acquisition, without ensuring regular updates for all.

Within four pilot countries, we could collect several simple indicators (total population, population density, unemployment rate, and foreigner rate, income of households...) in a continuous way, from the NUTS 1 until the LAU2/NUTS5. More complex indicators present in a systematic way of the gaps and discontinuities, either verticals (of the space levels low towards highest), or horizontal (between entities of the same administrative level).

The *geographical data* constitute the base of the spatial representation of the indicators. Primarily exchanged and distributed in the form of file vector "shapefiles", we tried to preserve the homogeneity of the format for the whole of the collected data. The national and international distributors of geographical data propose generally various alternative formats, although the shapefiles are dominant.

The cartography of various countries in the same interface and in a continuous way can be confronted with various problems. They primarily result from the characteristics of the various cartographic products. Among those, we will retain the reference levels of the digitalization, the basic scale of the cartography, the inaccuracy being able to reach several

kilometers or employed projections. Many of these constraints can find a solution by the exploitation of the possibilities offered by the cartography software, which has function of correction or modification of projections, but it is not beyond the capabilities of the majority of the local actors.

In addition, the constraints related to the cost of the data also exist for geographical information. The countries which give the geographical data for free are a minority in European space. The majority of them require a price growing according to the precision of the data and in certain cases the format. Beyond the cost, the acquisition of the geographical data is made complex by the multiplicity of the actors implied in the same country, the subcontractings, the formal agreements with companies, the incompatible data formats with the most widespread software of cartography, certain legal restrictions in terms of diffusion, etc..

The only official organization providing administrative cuttings for the whole of the European Union at an infra national level is the European Office of the Statistics (NUTS 1, NUTS 2 and NUTS 3), but the precision of these data is poor (scale of reference 1: 1.000.000) and does not resolve the problem of the supra-communal, communal and infra-communal levels, which are the most important levels for the local actors.

We found only one private distributor of geographical data for the whole of the European Union and certain countries partners. This supplier places at the disposal various products at the scale of the Union of which a map of administrative cuttings having for geometrical base the administrative communes or equivalents. The base assignee of this supplier eludes the question of the diversity of the identifiers (met for national suppliers) since those are harmonized according to European nomenclature NUTS/LAU. The use of such a product is optimal because it makes it possible to have uniform layers of information whose precision is satisfactory taking into consideration the objective of the tool. Nevertheless its cost in the long term makes its exploitation impossible for a big number of local actors having reduced financial means. It would be interesting to be able to develop in a near future a similar product, of which accessibility would not be subjected to such financial constraints.

The **metadata**, data about data was an important topic. Volumes of data treated by the system of representation of territorial information are considerable: it is a question of distributing data of 27 countries for many indicators. Potentially, taking into account the administrative levels, it's represent several millions of data. The preceding discussion showed

in addition that the sources of the indicators are numerous, and that the obtaining conditions are particularly diversified.

In this context, several arguments are in favor of the collection and the aggregation of metadata describing at the same time the data themselves. Firstly, the end users must be able to analyze the data by knowing the calculating methods of the indicators, the year of the data, their source, etc. Secondly, the metadata are useful within the framework of the updates and the various automatic treatments being able to be carried out on the database.

The research undertaken within the framework of program CAENTI aims to harmonize the metadata and to adapt them to the geographical data and the indicators. The research undertaken in this direction is based on Dublin Core, INSPIRE directive and the ISO standards. Work led to a proposal of grid for the metadata, which was successfully tested on European and national indicators, like on geographical files.

In the **webmapping**, the cartographic interface is the element of the presentation system the most seen by the end users. Its design must be adapted to all data-processing environments in order to reach a broader public. Nevertheless, it should be stressed that a good gate of information depends less on its aspect than on what it contains, but its aspect contributes to the visibility and the handiness of the tool.

A first webmapping was done to represent data at the communal level and we initiated regional experiences at infracommunal level.

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décompresseur  
sont requis pour visionner cette image.

*Diagram 10: European web mapping of territorial indicators (unemployment) at communal level (P. Pehani, ZRC ZAZU).*

**Web mapping enables delivery and publication of interactive maps, data from GIS**, and associated metadata, with the ability to query, manipulate, and interact with data. Maps can be linked to databases and other information sources, allowing them to be

visualized and queried. The system can also be extended to other resources and allows multimedia components to be displayed for particular features of the map.

Web based interactive map is a very powerful tool. First, it is a dynamic tool. End user can interact with it to display the map – and also contextual information – that he wants. This is the most important advantage compared to the static, pre-prepared maps that are basically static images. Second, it is a highly visual tool, and graphical presentation can outperform normal textual or tabular information. Last but not least, it is very simple to use. Only basic computer skills are required for the end user to be able to get all the capabilities.

Main objective of the web mapping portal that has been developed within the caENTI framework was to design an interactive map of Europe for visual representation of selected caENTI indicators. It was built on standard web mapping technology, on an open source based software solution. The final goal is to give the user with only basic computer knowledge – in short time – the means to visualize and analyze socio-economic parameters.

**As conclusion,** The realization of a European portal of indicators as component of the cognitive process of the territories requires a particularly important ground work. After an inventory and a selection of the indicators represented on the basis of the guide adapted to the method CATALYSE, the relative questions to obtaining the data and the metadata emerged. They highlighted the need for collecting both data simultaneously to inform the end user as well as possible.

The collection of information was also particularly instructive to show the availability and the cost of acquisition of geographical information or indicators. The disparities of information spread shown during the research also show the difficulties encountered by the actors to obtain abundant and relevant territorial information. The centralization of the information and its standardization seem to be an essential prerequisite for the processes of the territory knowledge, efficient and accessible for the various actors.

The use of an interactive cartographic interface based on technologies of *Web mapping* makes it possible to exploit with relevance the elements implemented before and to widely diffuse near users, whom are sometimes not accustomed with the methods of cartography essential for the comprehension of the territories. The existence of a functional prototype based on real and territorialized data tends to confirm the feasibility of one gate on a European scale, realizing substantial improvements on the level of the accessibility of the

data, objective which will probably be continued thanks to European engagements like the directive INSPIRES.

### **2.7.2.2. Progress on tools**

#### **2.7.2.2.1. Progress on CATALYSE tools specifications (wp6p) – Leader Cyril MASSLOT (UFC)**

In the first period WP6P progressed much with tools:

- It wrote conceptual, methodological and technical specifications for PRAGMA (deliverable 54). It implemented a first “collect” version, fined down to data collecting functions to secure its use, integrating the ACCEM migrants guide, before integrating the European guide, in order to test and valuate the CATALYSE Toolkit. It coordinated computing specifications for two free and multilingual “collect” versions: a standalone multi-platform version in JAVA and an standalone version in PHP/MySQL. They would be compatible to feed the same database. It started up computing specifications for a standalone multi-platform complete version of PRAGMA, mainly for data processing in the CATALYSE Toolkit. The modeling of the data processing chain and of the data analysis will further allow defining specifications for an online data processing.
- It defined the technical specifications for the integration of quantitative and qualitative data analysis software (deliverable 55). It began to coordinate the integration of ANACONDA and NUAGE in a standalone multi-platform version, which is called ANACONDA 2.0. Once a comparable version of PRAGMA will be done, it could be integrated with ANACONDA.
- It wrote the technical and computing specifications for an online services repertory (deliverable 52).
- Technical and computing specifications for a free Territorial Information System are also given (in deliverable 56).
- A major progress, in advance on the planned worked, is the design of a Territorial Intelligence Community System that integrates the data analysis software, the spatial analysis functions, the data processing protocols, the external documents, the produced documents, the editorial workflow and the community uses or of the development partnership (deliverable 55).

An important development work was made to improve the CATALYSE Toolkit software friendliness. The software accessibility of data quantitative analysis ANACONDA (analysis of correspondences and hierarchic ascendant classification) was highly improved with the multiplatform version. The NUAGE software of 3D animation highly improved the understanding of the ANACONDA results for their analysis and interpretation.

The data processing and informational modeling of a territorial intelligence system (TIS) started. The TIS allows territorial actors join their information through distributed networks, and then to exploit them in a cooperative way, in order to improve the territory knowledge and to draft action projects.

The coordination group WP6P work out in April 2006 a fined down prototype of PRAGMA, the “collecting” version, reduced with the keying-in and data control functions, without data analysis functions, to begin six territorial diagnoses with the “migrants” guide, in the network of migration observatories animated by ACCEM in Spain. The “migrants” guide was already an important synthesis of the guides that are used by observatories on migrations in Spain. Even if this synthesis remains limited to Spain and to a kind of public, this guide results from a multisector harmonization effort at the national scale. It could be implemented at the level of three former observatories and of three new one, what allows quickly testing a PRAGMA version. It prefigured the version that will be used for the European guide. It is a “collect” version fined down to the gathering. Its use was strongly simplified so as to avoid the manipulation errors. It was accessible to all the users, because, apart from the guide contents knowledge, it is sufficient to be trained to elementary office automation actions.

Then, the WP6P began drafting the technical specifications about the integration of PRAGMA, the software for quantitative analysis, with ANACONDA and NUAGE, the software for qualitative data analysis. It finally initiated a more ambitious project about a complete system that integrates all the contents, documents, data analysis functions and editing functions, according to the various uses of the different entities that contribute to the activities of a development partnership (deliverable 55). Jean-Jacques GIRARDOT presented this new concept, the “Territorial Intelligence Community System” or TICS, in the conference of ALBA IULIA. Once this framework has been emphasized, the WP6P began working out parts of the system. It wrote the computing and data processing specifications:

- For a new version ANACONDA 2.0 integrating ANACONDA and NUAGE.
- Then for the integration of the standalone multi-platform and multi-language version of PRAGMA with ANACONDA 2.0.

The coordination group WP6P wrote the technical specifications of an online services repertory for CATALYSE Toolkit.

The European services repertory is the second tool of the CATALYSE Toolkit. It allows identifying and describing the structures, services and actions of territorial development and publishing these information under the form of an online repertory, on paper and on digital supports.

This repertory objective, in the Catalyse method, is at the same time pragmatic and strategic:

- The actors of a territory should be able to contact a resource-person, who intervenes on a specific problematic, so as to answer a need or a series of needs, during interventions with users. At that moment, it is necessary to be able to take inventory of the available services and actions so as to concretely contact the service, the action, consequently the organization and the referent person(s).
- For the project planner, who animates a Catalyse observatory, the repertory is also a support (a tool) to concretize the partnership: the information gathering implies many contacts between partners, and it is felt as a common objective. Thus, it allows mobilizing the network on the execution of a shared directory in which there is every one, and important thing, every one can recognize. Consequently, it is a collective expression that consolidates the relationships between partners, also by involving them from the methodological point of view (in particular by associating them to the contents design), and from the technical point of view (manipulation logic of a shared tool to be adapted according to the needs).
- The data that are gathered in the course of time and that are updated in a reliable and continuous way, should be presented in periodic analyses.

This directory is managed by a database which is published on internet, where it is possible to do four types of actions: look for specific information, add more information by an index form that describes an action or an actor, modify an existing index form, and delete an existing index form.

These specifications aim at giving the orientations the final produce should follow; then a functional analysis will have to take place, so as to traduce this outlook in tangible and executable data-processing elements. They define the repertory conceptual analysis, the desirable browsing scenarios; the conceivable management procedures; the contents the form will have to manage and the meta-data that will be associated.

These specifications allow suggesting an organization to make the data-processing programming of this tool and a European form.

The WP6P also worked on the use of mapping tools, in the observatories of Odina (ACCEM), Opasi (ACCEM), OPTIMA, INTEGRA and in some others experiences, as the regional observatories for the evaluation of the minimum social income in Portugal, or the Geographical Information System of the French Inter-ministerial Delegation to Town Policy, so as to design a Territorial Information System and to write its methodological technical specifications (deliverable n°56).

**2.7.2.2.2. Progress on data processing tools specifications (wp6d) – Group leader Cyril MASSELOT (UFC)**

In 2007, the Wp6d research coordination group organizes a narrow researchers and engineers staff of twelve persons to design the *specifications for the processing and editorial chain from data to results*.

The data-processing and technical specifications established in 2006 allowed quickly initiating the execution of the tools that were useful for the ACCEM experimentation. ADAPEI, INTEGRA and COCAGNE, which are experienced actors in online tools, were also associated to this research action, as about contents, guidance notes and uses.

It developed in Coospace a wp6d scene, with a bulletin board for Wp6d news and three specific forums for Anaconda 2.0, jPragma and epragma and a specific mailing list: [wp6d@msh.univ-fcomte.fr](mailto:wp6d@msh.univ-fcomte.fr)

As cross activities with the others groups of the WP, the Wp6d group had:

- To include the results of the activity of the wp6c: the objective was to describe in the specification of tools how to include the guide, the form of the repertory, and all contents of the Catalyse toolkit.
- To articulate his specification with the investigation of the wp6f, by the specification of the on-line help (manual and dictionary of contents). The point is to prepare the Catalyse toolkit to organize a guidance way inside the tools.
- To follow the work of the WP4i, to be prepared for the inclusion of the portal of indicators into the Catalyse CMS.

At least, because of the online objective of all of this, we linked with the WP3 team, to attempt articulate the access of the Catalyse toolkit with the IT portal.

As the technical specifications for the tools of the CATALYSE Toolkit were given, and first tools existed:

- PRAGMA collect version,
- Complete PRAGMA version for data analysis,
- ANACONDA and NUAGE.

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*Diagram 11 : Pragma classic, page of a question*

The WP6d began here, to develop the specifications for more friendly, free, multi-platform and multi-language versions, for the CATALYSE Toolkit. Then, it also focused its activity on conceptual specifications of the TICS, the on-line versions in the prospects of the TICS:

The coordination of the execution of the Catalyse Toolkit following the integration design that was showed in ALBAC conference in 2005 (GIRARDOT, 2005)

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*Diagram 12: Integration of the CATALYSE tools*

Thus, at the end of 2006 and at the beginning of 2007 were executed:

- - The execution of a Pragma version limited to the key-in. It is limited to the data gathering (adding, modification, suppression error: individuals deactivation, questionnaires import if empty, import-export of individuals, balance and table for the data-analysis), so as to reduce the risks of manipulation or intrusion errors. This “gathering” version is provided with the European guide. It will be enriched by synthesis questions.
- - The development of jPragma, the Java version of Pragma.
- - The integration of the Anaconda and Nuage software, in a new ANACONDA 2.0 version.

**jPragma** is a standalone, cross platform et multi-language version of PRAGMA in JAVA. It is directly usable on a personal computer, independent from the kind of personal computer and from the exploitation system. It is able to work on free systems. It uses again the general architecture of the Pragma Toolbook version. It can be use on every actually versions of operating systems supporting Java (Windows Vista, or XP, Linux, MacOS

The qualitative analysis software Anaconda and Nuage, which particularly allow calculating needs (and services) profiles are presently integrated, what improves the results interpretation. They constitute a new multi-platform version **Anaconda 2.0**.

Like jPragma, Anaconda 2.0 version is also standalone, cross platform and multi-language.

That allows initiating the integration of PRAGMA and ANACONDA. It will improve the interactivity between the quantitative treatments and the qualitative analysis.

WP6p draft three specifications of the **integration of these tools** at an upper level, online, in the **TICS**. Some prototypes are also experimented.

The specifications are those of the TICS, the data processing ones and the ICS ones. The prototype tools are epragma, the CMS CATALYSE and mapping online solutions.

The definition of the **TICS** concept very quickly started the following steps, specifications for the online file, territorial intelligence system that will integrate a portal of territorial intelligence indicators in 2008. When a territorial information system integrates technical functions, generally for experts, the Territorial Intelligence Community System is at the service of a community for and with territorial actors of sustainable development (GIRARDOT 2007).

According to the following diagram, the research actions on the *TICS modelling* will concern:

1. The integration of the statistical and spatial analysis functions (in blue in the next diagram)
2. The analysis protocols modeling (red)
3. The specifications of the documentary and editorial chain (green)
4. The integration of the social uses (orange)

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*Diagram 13: Territorial Intelligence Community System*

The **integration of the statistical and spatial analysis functions** followed the diagram of integration of the CATALYSE tools. Then we worked out online versions. We began integrating software, but we prefer to talk on functions, because it is clear now that the definition of the modules of the software will finally depend on the uses.

The **modelling of the protocols of statistical and spatial analysis** yet depends on the sequences of software, on the one hand, and on the global phases of the processing, on the other hand. We cut it into six phases in order to identify the internal steps of each one : data gathering, coding and recoding, quantitative analysis, qualitative analysis, spatial analysis and publishing of results on line.

Concerning **documents and editorial chain**, TICS gather a large variety of documents from the most usual to data tables, statistical tables, histograms, maps, factorial spaces, classification trees, and so on. We engaged the harmonisation of documents with the integration of software and the definition of protocols. We definitively choose Dublin Core for the metadata.

We suggested a first **modelling of the uses** on the base of the CATALYSE governance according to the participative functioning of the development. They were deepened on the base of the communicational approach.

The group Wp6p coordinated the development of the online version of Pragma, **epragma**. A first version is available for tests. It suggests the following functions with the corresponding rights management:

- To create and manage projects in a partnership
- To organize in a project several questionnaires for data gathering and quantitative treatment
- To digitalize the diagnosis and evaluation guide in a questionnaire
- To organize the collective work in a questionnaire (manage users)
- To manage the quantitative treatments (to calculate, to publish)

This version was tested with Spanish migrants observatories, then for a real enquiry concerning 1000 persons.

The Wp6d coordination group also works to adapt **free and friendly cartography software** that manages territorial indicators. We also experiment with ACCEM and INTEGRA PhilCarto software. We also updated the free cartographic tool to map the information of the Territorial Indicator System (TIS).

The cooperation with **computer sciences** specialist was necessary to complete the data statistical analysis with tools of spatial analysis and cartography, then to update the specifications and to make the basic software of data statistical and spatial analysis evolve towards cross platform versions within the framework of networks and Internet. Computer sciences researchers also began drafting specifications for a deep evolution of the territorial information systems.

Wp6d also drafted **ICS specification** for TICS. Social actors involved in the territorial observatories adhere to the necessity to produce quantified and qualified information in order to guide their actions according to populations needs. In reference to the communication cycle of MUCCHIELLI (2003), the CATALYSE method is firstly interested in two times very specific to notions brought up by the SIC:

- The sense production, which occurs during the data processing into information
- The communication elaboration strictly speaking, according to initial data and produced information.

It is advisable to structure these steps in a communicational aim without neglecting the scope of uses.

As conclusion for wp6p coordination activities, four Pragma compatible versions were available:

- A classic "key-in" version, whose functions are limited to key-in.
- A classic "treatment" complete version
- jPragma, the standalone cross platform version in JAVA.

- epragma online version, that is recently developed in a “key-in” version

The integration of Anaconda and Nuage in Anaconda 2.0 Java version was finalized, with technical guidance notes. The technical specifications of eAnaconda were written for the online version of Anaconda. The technical specifications for the integration of PRAGMA and ANACONDA were defined.

More than planned, a CATALYSE Content Management System (CMS) was also worked out. It is a website whose contents can be directly managed. It integrates the services repertory and a document base. The idea is to organize the access to all the information about a Catalyse observatory and at the same time the access to the Catalyse online tools, in an intranet part.

As a consequence, the Catalyse Toolkit will offer a complete set of statistical and spatial analysis tools that will be accessible on line when the actual prototype will be tested what is done in ACCEM experimentation in particular.

WP6s followed coordinate the TICS and the CATALYSE toolkit.

### **2.7.2.3. Progress on uses**

#### **2.7.2.3.1. Progress on CATALYSE guidance notes (wp6g) – Group leader Maria Jose ASENSIO COTO.**

The objectives of this group was the study of the CATALYSE method implementation and used in the development partnerships in order to elaborate a guidance notes for the use of Catalyse tools. This objective implied to work on three concrete aspects:

- Contents of the European Guide of Diagnosis and Evaluation (upgrade of contents) and the meanings of the contents.
- Data processing protocol of the European Guide. To facilitate the work of the information analysis (territorial actors)

The wp6g started from the experiences of the partnership observatories that use the Catalyse method, to specify recommendations for the Catalyse new users. These coordination also use the regional steps.

Before the Conference of ALBA IULIA, wp6g make a global fix on the modeling of the Catalyse experiences. The WP6 suggested a first pattern for Catalyse governance integrating territorial cooperative observation tools within by participative territorial partnerships:

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*Diagram 14: Scheme of Catalyse governance (J-J. Girardot, ThéMA)*

The actors that take part in the development partnership are gathered in an *operational group*. It defines all the useful data, supervises the analyses and interprets the results. It drafts the multi-sector diagnosis and evaluation guide, the services repertory and selects the territorial indicators coherent with the guide. It regularly updates the documents or the databases.

The partners gather the data and share them for the analysis. A qualitative diagnosis identifies the main needs profiles, whereas the quantitative sorting estimates the importance of the corresponding persons groups.

Then, the actors participate to the results interpretation within thematic *workshops* defined and constituted according to the needs profiles. The workshops confront the needs that were underlined by the diagnosis with the services repertory, in order to identify the deficiencies and non-adaptations of the services offer with respect to the needs. They also compare the needs territorial distribution to the services one. They confront the results to the territorial indicators, to exploit the territory potentialities and to take into account its constraints.

This observation step generates *projects* that are drafted within the project groups. Then, it allows regularly evaluating the led actions.

The partnership also guarantees the results publication, firstly on an extranet website that is intended for the partners, and then on a public Internet website.

The diagnosis execution, its regular repetition, the constitution and permanent updating of the repertory and of the contextual indicators feed a shared and participative information system.

Wp6g also began to list, describe and analyse the Catalyse experiences in Europe. In the conference of ALBA IULIA, we decided to join the wp6c and the wp6g in the wp6g, because the comparative research concerns the same actors. Besides, it avoided having any dispersion at the cooperative work spaces level.

A pattern sheet for the data processing was validated. Wp6g also decided to distinguish two aspects of each of the histories: the partnership presentation, and its observation mechanism.

Then Wp6g achieved meaning first definition of the European guide questions, and synthesized the data analysis and data processing protocols of the latest diagnosis participants' observatories have made. It also gathered the stories retracing the great stages of observatories development and the mechanisms description, so as to compare uses and to elaborate recommendations. All the actors of the caENTI worked in their respective histories and their observation mechanisms. Describing the Catalyse observatories functioning with the examples of ODINA, OPASI, OPTIMA, INTEGRA, VALDOCCO and ADAPEI.

Wp6g designed a comparative sheet about data protocols, then the aspects that are linked to the Catalyse participative uses within a partnership.

#### **2.7.2.3.2. Progress on uses of territorial intelligence tools (wp6u) – Group leader Celia SANCHEZ LOPEZ (UHU)**

In the WP6 workshop of ALBA IULIA 2006 conference, it was mainly decided to join the coordination groups wp6c and wp6g in the prospects of a “uses” workshop, with the following tasks :

- Achieving meaning first definition of the European questions,
- Synthesizing the data analysis and data processing protocols of the latest diagnosis participants' observatories have made,
- Gathering the stories retracing the great stages of observatories development and the mechanisms description, so as to compare uses and to elaborate recommendations.

The wp6u coordination group was created during Huelva conference on October 2007 in order to:

- Study the uses of caENTI observatories

- Follow the caENTI experimentations
- Make a repertory of territorial actors (see deliverable 58 and 60).

The ACCEM experimentation was a new experimentation in CATALYSE observatories. It was followed up by the Wp6f for the contents and by the Wp6d for the tools. This experimentation concerns a network of nine Spanish migration local observatories coordinated by ACCEM. Four are former ones: MADRID, GIJON, SIGUENZA and GUADALAJARA. Five are new ones: OVIEDO, LEON, SEVILLA, GIRONA and VALENCIA. These observatories are developed within the framework of local development partnerships and they are integrated in a national network at the ACCEM level.

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*Diagram 15: ACCEM Experimentation*

This experimentation began within the local migration observatories animated by ACCEM in Spain, by using the ACCEM migrant's guide that is close to the European guide. The ACCEM migrants guide constituted a first synthesis of the ACCEM guides (ODINA and OPASI) and it has been operational since April 2006.

As most of the European guide indicators that are also part of the migrant's guide, it is an indirect experimentation of the European guide. It gives to the comparative research activity a very concrete reference that allows jointly studying:

- The contents understanding by the end users and how to create a common language at this basic level, because it is the first condition to improve the data quality;
- The tools use by the end users with poor computer skills;
- The quality of the data gathering;
- The data analysis protocols according to the local and national levels;
- The tools uses within the framework of local partnerships and national networks.

Six annual territorial diagnoses were made by the six ACCEM observatories, three former ones and three new ones, from 2006 to 2008. They allowed testing the contents accessibility, understanding and quality. Their processing allowed confronting the protocols of data statistical and spatial analysis in various partnership and territorial contexts. First changes were made at the end of 2007. Consequent modifications in meanings and protocols are in progress within the ACCEM.

OPTIMA came in HUELVA 2007 conference with two representatives of the village of **CHAPELLE-LEZ-HERLAIMONT**, to study the possibility to implement a new territorial observatory in this rural commune, as an experimentation of CAENTI. OPTIMA was in charge of elaborating the project.

In the LIEGE coordination meeting, on February 2008, the project was in progress with the development partnership.

At the end of the first period, OPTIMA and INTEGRA have began a first joint draft of recommendation for the use of CATALYSE method and tools in development partnership. These recommendations were listed as a piece of the CATALYSE Toolkit in the MADRID coordination meeting, on April 2007. In HUELVA conference, on October 2007, the concerned actors asked for an evaluation of the use of CATALYSE Method before rewriting the recommendations they wanted to summarize for discussion.

During the coordination meeting of WP6 in MADRID, we decided to complete the descriptions of the CAENTI development partnerships, as well as the descriptions of their observation device. The objective is not to fill in forms, but rather to establish an editorial canvas that allows making a homogeneous presentation, but not a uniform one. Thus, their redaction could be used again, from descriptions established by the concerned actors and with the concerned actors, in a journalistic spirit. To do so, we would have to complete the descriptions by scientific analyses. The use recommendations jointly drafted by OPTIMA and INTEGRA can provide a canvas for this evaluative study.

During the HUELVA conference WP6 also suggested unifying and widening this step because caENTI worked out many approaches about territorial intelligence projects, in different but complementary ways:

- Within the Wp4p, in which we wished to identify projects in the territorial intelligence field funded by the European Union, and which were external to the CAENTI.

- Within the WP5, universities analysed research-actions, which constituted territorial intelligence projects achieved in the CAENTI universities, but which were not development partnerships using the CATALYSE method.
- Within the Wp6g, five Catalyse development partnerships were studied. Three of them were the subject of a more deepened analysis about their observation methods.

More descriptions of actors involved in the CAENTI and articles suggested for the focus of the territorial intelligence portal.

The Wp6u coordination group that was created in HUELVA conference to make a large survey on territorial intelligence projects in Europe starting from caENTI and from CATALYSE projects, continued its activity in the framework of Wp6s about uses integration in the TICS.

#### **2.7.2.4. Progress on community system of territorial intelligence (wp6s) – Group leader Cyril MASSELOT (UFC)**

The TICS integrates the specifications on contents, the software and the uses, from Catalyse method.

##### **2.7.2.4.1. From Catalyse to TICS**

During the first period of caENTI, common specifications were drafted for information contents: guide, repertory and territorial indicators; as for the data processing tools: Pragma, Anaconda, Nuage and Sitra for mapping. The definition of harmonized information contents and tools specifications, on the basis of observatories experiences and respecting European standards, strongly mobilized actors and researchers at the European scale. New experimentations quickly started with the updated contents and tools.

The modelling of the Catalyse method made decisive progress:

- The information contents became at least as important as the data processing tools.
- The specifications for uses became more important than the technical guidance note.

Data analysis protocols were drafted to define the data processing and the analysis process for each question of the guide. These protocols were deduced from the generic analysis process on one hand, and from actors needs and uses on the other hand.

During the second period, two coordination groups drafted specifications for:

- The integration of the guide within the European online file (IIAF), which computerises a traditional professional tool.

- The generic processing and editorial chain from territorial data to results publication.

During the first two periods of caENTI, we progressively define the territorial intelligence community system (TICS) as a territorial information system (TIS) designed on the basis of actors use and specifically uses within territorial development partnerships. Its governance in the observation field was illustrated within the Catalyse method framework.

Our first objective was to integrate the fundamental analysis software Pragma, Anaconda, Nuage and Sitra as modules of a Territorial Information System (TIS).

In the TIS, we designed the information concerned a territory, that is to say a geographic space and its community. They are referenced in space and time. The aim of the statistical and spatial analysis functions was to help territory actors, by producing knowledge about the territory. We considered the functions from the technical point of view of an editorial chain:

- Gathering information
- Analyzing them according to scientific protocols, especially in a spatial prospect
- Interpreting these analyses results
- Representing the information and the results
- Drafting decision-making scenarios
- Managing and evaluating policies, programs, devices, projects and actions that result from these decisions.

When we paid interest in uses, we referred to the following definition that focuses more on the uses than on the functions: A TICS is a TIS addressed to a territorial community, or to a partnership of territorial actors who want to develop democratic governance according to sustainable development principles.

- It favours information sharing within a territorial development partnership;
- It instruments the data cooperative analysis and the participative interpretation of the results;
- It introduces citizens' participation in the decision-making process;
- It provides to the actors useful information in order to draft projects, and then to manage and to evaluate them;
- - It gives to the community all the useful information.

It exploits the potential offered by computer science for gathering information, sharing it, favouring the actors' partnership in the information cooperative analysis, and increasing citizens participation, by improving their information and their access to information. It

respects the constraints that sustainable development, particularly participation and partnership, imposes to information processing and publication protocols.

Wp6s followed four research axes: software integration, editorial and documentary process, analytical protocols and integration of uses

Before considering the results in each axis, we will quote the research actions on transversal specifications about the overall design of TICS initiated last year (see deliverable 57 and 58)

- Computer science specifications, coordinated with Sylvie DAMY and Bénédicte HERMANN of the “Laboratoire d’Informatique de l’Université de Franche-Comté” (LIFC)
- Energy consumption and ecological use
- Ethics and law, mainly about the respect of private life
- Information and communication sciences coordinated by Cyril MASSELOT

#### **2.7.2.4.2. Software integration**

The tools integration is the starting point and the most advanced axis of the TICS. Its work was preceded by the creation of specifications regarding the software Pragma (deliverable 54), its integration with Anaconda (deliverable 55), the territorial indicators System (deliverable 56), then the analytic and editorial chain of territorial information from gathering to online publication (deliverable 58). This part aims at showing the progress in the development of the software and in the design of their integration.

Before the CAENTI project, we began to develop new stand-alone cross platform version of software and to integrate data and spatial analysis software.

These first steps were quickly joined and enlarged with the design of the TICS during caENTI, in two directions:

- Firstly we wanted to gather the tools in a Catalyse Toolkit for personal computers.
- Then we pursued a better integration of the tools in a unique database within the TICS.

We followed the first schema of integration of the Catalyse software and upgraded pragma classic, developed a version in Java jPragma and an ePragma online version and integrated Nuage in Anaconda.

During the last period of caENTI, the software and their integration made important progress with:

- The java version of Pragma, ready for a daily use. It has the same function of Pragma classic and new functionalities, as the multilingual management.

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*Diagram 16: Cross-platform version of Pragma (J. Bénilan, ThéMA)*

- A new version (2) of ePragma:

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*Diagram 17: New epragma version 2 (R. Thomas, ThéMA)*

- Anaconda has been entirely rebuilt with a new graphical user interface, more ergonomic and easier to use.

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*Diagram 18 : New beta version of Anaconda 3 software (cross-platform and online, M-E. Ramage, ThéMA)*

The European portal of territorial indicators allowed to integrate statistical and spatial analysis.

These tools were presented in the workshop “Catalyse tools integration” and “European portal of territorial indicators”.

The CATALYSE Content Management System, now prefigures a more ambitious TICS. It suggests to Catalyse old and new observatories a website « ready to go », based on the Catalyse method, multi-language, low cost, robust and reliable

The Catalyse community, which allows free updated and gives a multilingual documentation at conceptual, methodological, technical and operational levels.

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*Diagram 19 : Catalyse community (C. Masselot, Laseldi)*

#### **2.7.2.4.3. Editorial and documentary process**

This research axis considers the TICS as an editorial process, from data collection to results publication.

We essentially designed the documentary process of the TICS.

Firstly, we updated specifications about the input documents: the guide for diagnosis and evaluation, the repertory of services, the territorial indicators, the file, the questionnaire as a model for the previous documents and the links between these documents.

Then, we completed the specification of the intermediary documents: Global qualitative balance, Cross plan, Boolean data sheet, codes list and the results file of Anaconda with a proposal for a new classes profiles file

The data modelling and of the topic of Métadata that were both coordinated by Sylvie DAMY and Bénédicte HERMANN. The report on data modelling was published on Coospace and a paper on metadata will be presented.

They are technical parts that are detailed in the deliverable 60.

#### **2.7.2.4.4. Analytical protocols**

By working on analytical chain, we became aware of the matter of its editorial function, directed towards online edition of data analysis results. In the second period, we drafted a first scheme of the main phases and stages, according to the technical protocols of

data analysis, and we initiated to define with the actors the specific protocol for each question of the guide in the framework of experimentations.

The deliverable 60 details the data processing and analysis for each question of the guide, from the experimentation of ACCEM (that also drafted the detailed protocols of its specific guide); INTEGRA Plus, ADAPEI and CHAPELLE-LEZ-HERLAIMONT.

Two examples of detailed protocols follows:

**[012] [Ec]- Descriptor: Indicate your class of age.**

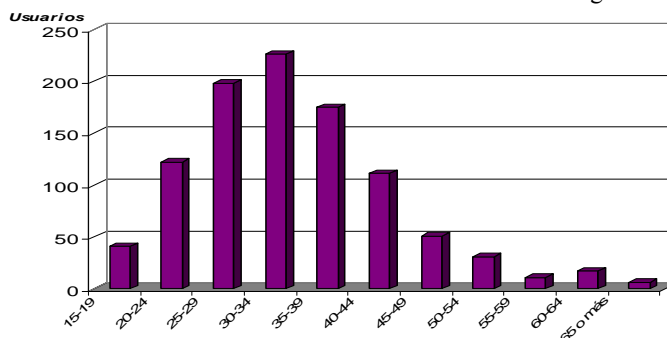
<b>Description of the descriptor:</b>	This variable picks up the interval of the user's age	
<b>Justification:</b>	It allows the comparison with the established age tracts in the Municipal Censuses and other official statistics.	
<b>Type of descriptor:</b>	Closed Nominal Categorized (CNC)	
<b>Type of answer:</b>	Exclusive (E)	
<b>Descriptors and codes of the categories:</b>	Ec15	Less than 15
	Ec17	From 15 to 17
	Ec24	From 18 to 24
	Ec34	From 25 to 34
	Ec44	From 35 to 44
	Ec54	From 45 to 54
	Ec64	From 55 to 64
	Ec74	From 65 to 74
	Ec75	75 and more
<b>Type of recommended analysis:</b>	This describer can be used so much in the quantitative analysis as in the qualitative one.	
<b>Type of proposed grouping of the categories for the analysis:</b>	Ec24	Less than 15 + Ec17 From 15 to 17 + Ec24 From 18 to 24
	Ec34	From 25 to 34
	Ec44	From 35 to 44
	Ec54	From 45 to 54
	Ec6+	From 55 to 64 + Ec74 From 65 to 74 + Ec75 75 and more

**Comparison with the context:** The upper and lower limits of each one of the intervals they have been fixed so the data can be compared with data obtained of European sources as population and social conditions, labour force survey and health survey.

**Interaction with other variables:** In the quantitative analysis it is convenient to cross this descriptor with the age. In this case it is possible point to make population's pyramids like graphic representations of bars.

**Representation:**

As it is a variable nominal ordinates it is convenient to use a diagram of bars.



**[022] [Ls]- Descriptor: What is your main current situation (only one answer)?**

**Description of the descriptor:** This variable refers to the user's situation according to the employment or to economic activity. So, to complete this descriptor is necessary to keep in mind the definitions of "employment population", "unemployed population" and "active and inactive population"

**Justification:** Diagnostic labor, so much individual as in groups

**Type of descriptor:** Closed Nominal Categorized (CNC)

**Type of answer:** Exclusive (E)

- Descriptors and codes of the categories:**
- LsWo Work with remuneration (autonomous, paid, member of a cooperative, family help, etc.)
  - LsUs Unemployed with subsidy
  - LsUw Unemployed without subsidy
  - LsSt Student (even on holiday)
  - LsPd Permanent disability
  - LsRe Retired, pensioner
  - LsWh Works in the household
  - LsOt Others types of labour inactivity

**Type of recommended analysis:** Recommended so much for the quantitative analysis as qualitative .

**Type of proposed grouping of the categories for the analysis:**

LsWo Work with remuneration (autonomous, paid, member of a cooperative, family help, etc.)  
 LsUn LsUs Unemployed with subsidy + LsUw Unemployed without subsidy  
 LsIn LsSt Student (even on holiday) + LsPd Permanent disability + LsRe Retired, pensioner + LsWh Works in the household + LsOt Others types of labour inactivity

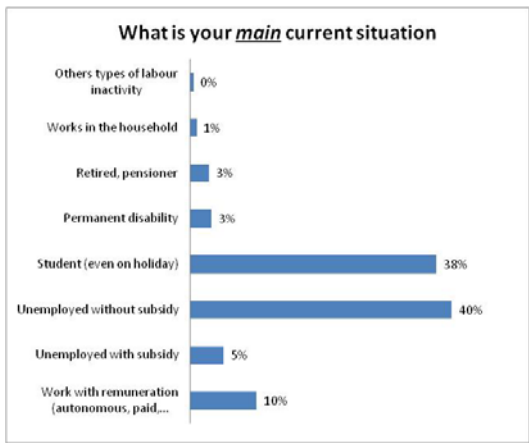
**Comparison with the context:**

European Labour Force Survey. These indicators were standardized at the European level with the investigation about the labor forces. The national studies have the best level of homogenization in the European Union. Then, they were updated according to the definitions established by the International Labor Organization within the framework of the XIIIth International Conference of Labor Statisticians.

**Interaction with other variables:**

The exploitation is advisable to carry out it next to the variable "sex" and the level of studies

**Representation:**



**2.7.2.4.5. Integration of uses**

When we were working on data analysis protocols and the use of Catalyse tools, we decided to enlarge the topic of the collective use of Pragma to the use of territorial intelligence by a development partnership, and above all, beyond it, by a community (deliverable 56). In the context of the current evolution of Internet towards social use, we bridged Internet community and community development, as a group of people gathered by a common project. It allowed clearly introducing the uses of a community, in the design of the system, in accordance with the modelling of the Catalyse governance (deliverable 56).

In territorial intelligence and TICS, the word « community » does not refer to the biological, historical or religious dimension. It refers to a group of people united by a common project. It is also the meaning that is used in computer science to refer to a users community. This meaning covering will allow studying the conditions in which territorial community can constitute the TICS users community. We should also take into account the

fact that if the information analysis can constitute a project for the TICS, it is an intermediary step at the service of an objective of sustainable development for the territorial community, or more simply for the local actors who want to plan, lead and evaluate actions of local development.

This orientation implies the categorization of the TICS users – *a priori*; experts, actors, partners and community, and the study of their uses:

- Which functions do need an expertise?
- Which functions are transferable to the users?
- According to which pedagogy and with which accompaniment?
- How to organize the sharing of territorial information, and then the cooperation at the level of their analysis and their edition?
- Which are the actors, partnership, and territorial community functions?
- How to associate the community by the means of the participative interactive systems?

This modelling implies an adaptation of data analysis steps and of the results interpretation, as well as of the editorial flow, to the communication, the animation objectives of the partnership, the participation and of governance of the territorial community.

We lead comparative analysis on the uses with the caENTI observatories and the four experimentations: Accem (Spain), Integra Plus (Belgium), Adapei (France) and Chapelle-lez\_Herlaimont.

We joined the WP6 (on methodological and technical aspects) and the WP5 (on “sustainability principles”) efforts. They organized together during the third period three coordination meetings in order to:

- Evaluate the Catalyse method from the point of view of the uses and of the users, with a first short evaluation form (Liege, February 2008). ). Jean-Marie DELVOYE, Christiane RULOT MARÉCHAL and Guenaël DEVILLET coordinated this évaluation and make a report that is in deliverables 60.
- Draft a form that allows describing, then analysing, the uses of territorial intelligence tools within development partnerships in order to make territorial diagnoses, to evaluate action, to observe, to elaborate projects, etc. (Huelva, May 2008). Maria Jose ASENSIO COTE coordinated the form drafting.
- Feed the form in order to draft papers that present the uses of territorial intelligence tools according to their action objectives and their principal approach in the domain of observation, and present a first version of their paper for internal discussion (Besançon, June 2008). Celia SANCHEZ LOPEZ and Jean-Jacques GIRARDOT animated the feeding and the papers drafting.

- These papers will be presented in the two workshops on “The uses of territorial intelligence tools”. Celia SANCHEZ will animate the workshops and Blanca MIEDES UGARTE made a synthesis that is in the deliverable 60.

The led experimentation fed the research activities that were made. The workshop members should now identify all the meetings devoted to observation activities within the partnerships.

#### **2.7.2.4.6. Conclusion and Prospects**

The draft of specifications for the TICS is a very important work we initiated in caENTI. It needs to be completed in all axes and will not be finished with caENTI. However, we recently drafted sufficient specification to begin experimentation of TICS.

Numerous topics are linked between documents, protocols and uses. It is often difficult to progress in an axis until we end another. Documents cannot evolve before protocols are sufficiently advanced and the latter depends on use analysis.

Research and action are also closely associated in this domain. Each tool, document or protocol need to be experimented before making a new step.

We can consider the work is now well advanced and will go on.

The tools have been presented in a demonstration workshop in the conference BESANCON 208, with the first prototype of online documentation managed by a wiki tool.

They can be downloaded on the *Catalyse community* website (<http://www.territorial-intelligence.eu/catalyse/>). Each version of these tools is available in a good and stable version. Meanwhile, they can be improved, and some points have to be finalized for a public use.

The *Catalyse Community* gives a first online version of the Catalyse toolkit.

The integration of the software progressed much. The website ready to use *Catalyse's Contents Management System* is a first simple TICS.

We have strongly initiated the specifications of the documentary and editorial chain with several approaches: documents, data modelling, and metadata.

Analysis of uses has mobilized all the caENTI territorial actors to elaborate a first set of recommendations on uses in the framework of participative partnership. The actors also initiated the constitution of a portal of territorial intelligence actors. They are now engaged in the specifications of the observation meetings in development partnerships.

### **2.7.2.5. The European Observatory of Elementary school (WP6E) - Group leader Yves ALPE (OER/UNISA)**

After having finished the critical analysis of the French Observatory of Rural School, the wp6e drafted the general principles of the European Observatory of Elementary School.

#### **2.7.2.5.1. Critical analysis of the Observatory of Rural School (OER)**

The work made by the OER for six years is a life-size experience of an Observatory of Elementary School kind.

The team is made up of approximately twenty members who have very varied status (university lecturers and researchers, trainers, lecturers and professors, teachers under the French ministry of Education responsibility) belonging to two research laboratories and five Teachers colleges.

It led five surveys and made a 12 000-questionnaire database, that is exploited much:

- Research works of the team members, as individual (PhD, Post Doctoral degree, several masters) as collective
- Individual and collective publications (four published volumes, the fifth one is being prepared)
- Organisation of seminars and conferences (among which the international conference « Education and territories » that took place in November 2007)
- Speeches, conferences, debates animation in many contexts and at the request of many actors: trade unions, NGOs, local political stakeholders, etc.

Besides, this work led to exchanges with European teams (Spain, Italy, Switzerland, Belgium...), among which some became perennial. For five years, the collaboration with the GIER (Inter-university group of rural school, Catalan universities) have concretised in pluri-annual exchanges of lecturers.

Led by the OER members, the critical analysis of this observatory emphasized its characteristics, its advantages and its drawbacks.

During this period, ThéMA and the LIFC (UFC) made the transfer of the OER database, which was managed through a data-processing system that had become obsolete, towards a PHP/mysql database, free, multi-platform and open system that can be managed with the epragma software, designed by the caENTI wp6s group.

#### **2.7.2.5.2. Design of the European Observatory of School (EOS)**

The wp6e inaugural coordination meeting that took place in Aix-en-Provence in July 2006 defined three main objectives for the EOS:

1. Gathering information about the academic performance of primary school pupils

2. Analyzing the relations within the school community from the sustainable local development angle
3. Carrying out studies about the locally-induced educational inequalities

A cross-cutting caENTI operational objective should be added to the above-mentioned ones, it is the instruments appropriation by local actors. Indeed, we want to determine the concerned actors and the concerned instruments.

The workshops held in Salerno (in May 2007), in Digne-les-Bains (in November 2007), in Lyon (in January 2008) and in Salerno (in May 2008) allowed precisely designing the project.

The observatory shape will be conditioned much by two elements: which concerned actors and for which users is it made?

The database will receive impulse from the actors (teams, actors in charge of the project..). It requires a scientific approach and a precise definition of the objectives as regards the knowledge to be produced. It is impossible to define it *a priori*, as it would be contrary to the participative principles that inspire territorial intelligence.

The users (researchers, institutions, local actors, etc.) are also actors who express a demand.

It is absolutely necessary to make initial methodological choices concerning:

- cohorts follow-up versus multi-annual surveys on samples
- independent national surveys subsequently put together versus multi-national format

The **methodological guiding principle** that bases the foundation of the European School Observatory was inspired by the analysis of the French experience of the Rural School Observatory. The latter aimed at creating a database by carrying out questionnaires and surveys with Catalyse (e-pragma). Local actors (teachers, representatives, NGOs, etc.) will help the observatory members to build the basic structure and to draw up a contract. The survey modalities (cohorts composition, follow-up, etc.) still have to be determined.

Anyway, it is necessary to provide a reference framework: the data reported below allow developing a descriptive factsheet for each participating country.

The main data are available on Eurydice (Euribase and ETES- EuropeanThesaurus of Educational Systems). Nevertheless, these data must be worked out again and new ones should be gathered for each country. This task should be made by part-timers and all the documents should be translated (as it is not always the case with Eurydice).

In order the OEE can get real significance, at least four countries should participate to the start-up phase and it is advisable at least six countries become involved in the project, in order the diversity of the European educational systems can be represented.

If we consider the **partners** we identified, it seems five could participate to the project: France, Belgium, Spain (Catalonia, GIER), Italy, and Rumania. At least one Nordic country could be added to this list. So far, only two teams (France and Catalonia) officially decided to get involved in the project.

Concerning the **data** necessary for each involved country in order to set up the observatory, we drew a list concerning school and territorial data.

#### Pre-primary school teaching:

- Given the huge disparities among countries, pre-primary school teaching will not be covered by the observatory. Nevertheless, a presentation of the following elements will be required:
- Optional/compulsory teaching and number of compulsory school years
- Pupils' age at their entry and exit
- Role of public and private schools
- Availability of informal education (kindergartens, etc.)

#### Structure of the compulsory schooling curricula:

- Number of years per level
- Pupils' age at each level
- Systems for shifting from one level to the other one (repeating a year, etc.)
- In-house evaluation systems
- Staff at each level
- Role of public and private actors at each level
- Teaching timetable (day, week, year)
- Compulsory subjects and time devoted to them
- Organization of the teaching activity: number of teachers per level, polyvalence or not, pedagogical teams....)
- Exits from compulsory schooling

This aspect will not be included into the database, but we need to know:

- The exit modalities (accompanied by statistical data)
- Exit ages
- Certificates

#### Territorial data:

- Decentralized administrative structures and territorial subdivisions
- Territorial zoning (urban/rural, etc.)
- Maps indicating the characteristics of the studied area (geography, demography, economics...)
- School zoning (at the various teaching levels if they are different)

General information about territorial implementation of public educational policies would be useful, but the comparative analysis remains very difficult... This point would

deserve a precise study in itself. It would for example make reference to the AFEC studies and it would require huge resources.

### **2.7.2.5.3. Synthesis about the European educational systems**

The OER team and UNISA started gathering papers about the European educational systems presented during international meetings and seminars organized by the wp6e within the caENTI framework:

- Salerno from May, 9<sup>th</sup> to 12<sup>th</sup> 2007
- Digne-les-Bains on November, 29<sup>th</sup> and 30<sup>th</sup> 2007
- Vesoul on December 11<sup>th</sup> and 12<sup>th</sup> 2007
- Lyon on January, 24<sup>th</sup> and 25<sup>th</sup> 2008
- Salerno on May, 15<sup>th</sup> and 16<sup>th</sup> 2008

UNISA also started making a global comparison of the European educational systems and of the training for the educational qualification in Europe that are published in the deliverable 61.

### **2.7.3. Workpackage 6 “Tools” deviations from the project workprogramme**

They were essentially positive deviations.

After it drafted specifications for Catalyse tools, portal of territorial information, and TICS, the WP6 also started developing the tools and protocols of the systems.

The introduction of a new group on uses allowed improving the tools uses analysis and the tools accessibility in experimentations that strongly mobilized the researchers and the territorial actors.

### **2.7.4. List of drafted documents and next deliverables of workpackage 6 “Tools”**

#### **2.7.4.1. Drafted documents**

- Guide immigration 2006. ACCEM- Spain.
- Guide GDR Wallon 2006. Belgium.
- Join Guide Optim@ asbl - Intégra Plus, Belgium.
- Guide. Observatory Seraing 2004. Project of Health Seraing's municipality. Optim@ asbl – Belgium.
- Guide “PDD MedAction Bâtiment”. Situation and follow-up of the user 1998”. Equal. France.

- Situation and follow-up of the user. Exigenece-MTI@SHS. ADAPEI-France
- Guide Mosaïque. Family Situation 1996. MTI@MSH. France.
- Guide Provincial Panel Huelva 2003 y 2007. Observatorio Local de Empleo. Huelva, Spain.
- Guide “Área Taller Escuela”. GEYSA. Foundation Valdocco. Spain.
- Guide “Área de Inserción Social”. GEYSA. Foundation Valdocco. Spain.
- Guide “Área de Mediación para el empleo”. GEYSA. Foundation Valdocco. Spain.
- Guide “Equipo de Medio Abierto”. GEYSA. Foundation Valdocco. Spain.
- Updated definition of the questions and modalities meanings from the territorial basic information of the Guide within European online Inclusion Itinerary Accompaniment File.
- Updated protocols of data analysis for the Guide within European online Inclusion Itinerary Accompaniment File.
- ACCEM Experimentation ‘GUION’, document for diagnosis and assessment, with meanings.
- ACCEM Data processing and personal data analysis protocols in ACCEM Experimentation.
- SIRIA Information system for refugees, migrants and asylum seekers.
- Synthesis of the CATALYSE individual documents for diagnosis and assessment of two Belgian territorial observatories: OPTIMA in SERAING and INTEGRA Plus in DURBUY.
- Information and indicators organized by blocks in the accompaniment file of ADAPEI and managed by the OSUA system.
- Quality recommendations of the "Jardins de COCAGNE" network.
- Assessment documents of the "Jardins de COCAGNE" network.
- CATALYSE: Manual de Uso para el tratamiento de Datos, ACCEM, diciembre 2006.
- GIRARDOT J.-J. (Ed), 2006: “Diagnostic croisé Bistrita (Roumanie) Besançon (France)”, MSHE C. N. LEDOUX.
- PASCARU M., 2006: A compared territorial diagnosis BISTRITA – BESANÇON. Methodology, Actors and Results of the CCDT Team
- GIRARDOT J.-J. (Ed.), 2006: **Diagnostic de territoire** de la commune rurale de DOUROULA au Burkina Faso, MSHE C. N. LEDOUX
- tia4i080501-report-result-WP4i.pdf: results of WP4i to be integrated into WP6i
- tia6i080701-report-result-WP6i.pdf: results of WP6i mid-term activity
- tia6i080801-cartography-data-and-shapefiles-WP6i.pdf: mapping of the data gathering
- tia6i080830-state-of-advancement-WP6i.pdf: state of advancement WP6i on August 15<sup>th</sup> 08

- Rapport modélisation des données pour des outils de l'intelligence territoriale.pdf
- eAnaconda\_Avancement.pdf
- tia6s080423-ePragmaPointAvancement.doc
- tia6s080424-SCIT-SI-DIV.ppt
- Rapport JPragma pour réunion WP6 du 22 avril.doc
- tia6s080425-ToolsProgress-En.ppt
- Rapport modélisation outil Pragma v0.5.doc
- tia6s080531-ToolsProgress-En.ppt
- Besancon-080627-wp6-Damy.ppt
- tia6s080627-ToolsProgress-En.ppt
- tia6d080214-OnLineTools-En.ppt
- ePragma-070420-MCDphoto.jpg
- epragma070827-manuel.pdf
- EpragmaRapport.pdf 07/01/08
- ePragma-Notice.doc 02/02/08
- Specification Epragma.doc 06/02/08
- ePragma-070405-Cdc.doc
- ePragma- Cdc sur les codes.doc 13/07/08
- Pragma Java:
- PragmaJava-070702-Point.doc
- jPragma-Problème importation.doc (09/07/07)
- Pragma Java\_fat.jar (10/02/08)
- Pragma script (10/02/08)
- Anaconda script
- Anaconda 2.0.jar

The wp6u also drafted forms and posters about the caENTI participants observatories.

Many papers about the European educational systems were written within the framework of the scientific meetings organized by the wp6e. They are detailed in deliverable 61.

#### **2.7.4.2. Deliverables:**

Del. n°	Deliverable name	WP n°	Date due	Delivery date	Estim. P/M	Used P/M	Lead contractor
51	European contents specifications for a CATALYSE guide for diagnosis and evaluation.	6	6	6	6	7	UFC
52	Specifications of an on line territorial repertory of services (contents and technical development).	6	10	10	4	4	UFC
53	List of territorial indicators available on internet for comparison with CATALYSE data.	6	10	10	4,75	5	UFC
54	Specifications for the software “PRAGMA” of quantitative collection and treatment software.	6	10	10	2	2	UFC
55	Conceptual and methodological specifications for a Community Territorial Information System, including technical specifications for integration of PRAGMA with the software of qualitative data analysis ANACONDA and NUAGE.	6	10	10	5,75	5,25	UFC
56	Guidance notes for the use of CATALYSE information and tools.	6	10	10	20,5	21	UFC
57	European on-line Inclusion Itinerary Accompaniment File with Guidance notes and list of territorial indicators available on internet for comparison with the on-line file data.	6	22	22	16,75	27,58	UFC
58	Specifications for the processing and editorial chain from territorial data to results.	6	22	22	8,50	15,75	UFC
59	Portal on institutional territorial indicators available on internet in Europe.	6	36	36	20	20	ULG
60	Specifications for a Territorial Information System.	6	36	36	8,75	15	UFC
61	<i>Report on feasibility of a European Observatory of the Rural Schools.</i>	6	36		5	10	UNISA
					102	132,58	

### **2.7.5. The workpackage 6 “Tools” specific prospects**

The WP6 made an important work during caENTI and it should now starting finalising it in the prospect to make it perennial.

Indeed, the WP6 did not only write the tool specifications. It often coordinated tools and prototypes execution. We should now think about the maintenance, the protection and evolution of the tools accessible within the « Catalyse community », of the territorial indicators web-mapping and of the Territorial Intelligence Community System elements, in relation with the innovation and dissemination plan.

We should about think about on the one hand the positioning of the reflexion led within the wp6u on the territorial intelligence tools uses and on the other hand the experimentations follow-up either in the WP6 or in the WP5. The more usual idea consists in distinguishing the tools technical and methodological use, that concerns the tools objectives, and the tools use conditions within the development partnerships, that rather belong to the WP5 research. As regards the experimentations, we should also distinguish the technical follow-up from the strategic accompaniment. We want to promote the databases made by the caENTI observatories and to improve the territorial intelligence projects visibility by making an online catalogue of territorial intelligence projects.

The observatory of rural school is among these projects. Beyond the specifications for a European observatory of school, that are now almost written, the wp6e group also started promoting the scientific lessons and the impact of this observatory at the territories level.

## **3. SECTION 3 – CONSORTIUM MANAGEMENT**

La caENTI reinforced the links between the consortium participants while underlining specialities.

The Université de Franche-Comté (UFC, France) coordinated all the caENTI activities. The Institute of Humanities, Social and Environmental Science (MSHE), the Development direction, and the Europe service were in charge of its management and the development of the dissemination activities. The MSHE coordinated the communication and the development of the portal <http://www.territorial-intelligence.eu> with the support of the Region Franche-Comté, the University of Pecs (PTE) and the université "1<sup>er</sup> decembrie 1918" of Alba-Iulia (UAB). It coordinated the tools design and execution. A strong cooperation with

the territorial actors developed in this in this field thanks to an important support of the universidad de Huelva (UHU) to harmonise the information contents and the analysis of these tools uses. It shown its skills in the tools field, but also in the analysis methods of territorial information one.

The Universidad de Huelva (UHU, Spain) coordinated the research activities regarding governance and participative research-action while demonstrating its specialisation in the sustainable governance field, in addition to its observation skills regarding local employment. It suggested environmental indicators. It animated the experimentations of the Spanish territorial actors. It gave an important support to the UFC to harmonize tools and to analyze uses. A regular collaboration developed between the UFC and the UHU. It is a structuring axis of the research coordination within the consortium.

The Université de Liège (ULG, Belgium) quickly shown its skills in the territorial information field, at the fundamental methods level, and also at the tools one where it participates to the execution of the European portal of territorial indicators webmapping. It animated the participation of the Walloon actors to the caENTI research activities.

The University of Pecs (PTE, Hungary) shown skills in the field of the territories competitiveness indicators, which are complementary to the ULG ones, and also in the field of the information and communication technologies for territorial development. It contributed to the development of a European portal of territorial indicators at the competitiveness indicators level.

The Université “1<sup>er</sup> decembrie 1918” d'Alba Iulia (UAB, Romania) participated to the research activities on the governance principles and on the tools for and with the actors. It specialised on the theme of the scientific observations analyses restitution to the territorial actors. It actively participates to the video recording and to the conference broadcasting, as well as to the acts publication.

The Universita di Salerno (UNISA, Italy) coordinated the research activities on the territory concept and on the constitution of a European network of elementary school on the basis of the rural school observatory experience. It constituted the European repertory of the research teams that make research on territory, in collaboration with the UFC. Specialised in the social cohesion field, it collaborated with the UHU to analyse participative methods.

The research center ZRC-SAZU (Slovenia) brought skills in geographic information systems and the experience of an intense collaboration in this field with the MSHE of the

UFC (European Applied Laboratory, ModelTER). It collaborated with the ULG to develop the geomatics part of the European portal of territorial indicators webmapping. These two teams animate a network that feeds and experiments this portal.

Tunghai University (THU, Taiwan) analyzes the economic, social and environmental impact of the scientific and industrial park of Taichung. It gave a counterpoint to the observation of vulnerable people in a territory characterised by economic growth in an important sector of the knowledge-based economy.

Generally, the caENTI territorial actors brought their skills and their experiences to harmonize the territorial intelligence tools, particularly regarding the contents, information and individual and territorial indicators definition. Each one brought the experience of a specific problematic, territory, public or thematic.

ACCEM (Spain) experimented the contents, tools and uses within a national network of nine local observatories of the migrations phenomena, multi-sector partnerships animated by Accem. A synthesis of the diagnosis and evaluation guide, services repertories and territorial indicators preceded the harmonization within the caENTI. It allowed harmonizing the tools and experimenting them from 2006. The presence of experienced observatories and of new observatories was an important factor to harmonize use guides, to define indicators analysis protocols and to analyze the uses.

Accem also collaborated with UHU and Valdocco on the theme of the governance principles.

The association OPTIMA (Belgium) developed an experimentation on the basis of an observation panel (approximately 7000 observations) on a town characterised by an intense industrial recession, Seraing. Optima developed a participative development plan of an extremely vulnerable area. These experiences allowed it developing a participative evaluation of the Catalyse tools uses within partnerships and communities. Optima experience had to stop because of a lack of grant, it is being transferred to another Belgian town: Chapelle-lez-Herlaimont.

The intermunicipal association INTEGRA PLUS (Belgium) made an experimentation in a rural environment. It contributed to the definition of the data analysis protocols within the framework of a territorial diagnosis, of the analysis restitution modes to the partnership actors and of the users' integration within the evaluation mode.

OPTIMA and INTEGRA PLUS collaborated much to coordinate the evaluation of the Catalyse tools and their use within multi-sector development partnerships.

The association ADAPEI (France) developed, on the basis of the Catalyse method, an integrated and participative system to manage and evaluate the services that it uses with handicapped people to make reception, specialised care, protected workshops, integration in classic employment, follow-up while working. It especially participated to research on the accompaniment files and on its use within the evaluation framework.

The network of the Jardins de COCAGNE (France) experimented the introduction of the Catalyse tools within the framework of the evaluation of its national and European network of integration actions regarding people away from employment. Compared with Catalyse, this device introduces many evaluation criteria concerning action management and its social and environmental impact, plus an instrumented step of sustainable development.

Both Adapei and Cocagne experimentations introduced the quality step in the Catalyse method.

Valodcco fundation (Spain) experimented in collabotation with UHU the tools of territorial intelligence and the participative methods within the framework of the district V development plan, an area of Huelva. This experimentation was awarded as a good practice at the international scale.

The Baranya department (Hungary) that is the project manager of « Pecs european city of culture in 2010 » mainly co

The plan for using and disseminating the knowledge is presented in deliverable 9.

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