CAENTI
Coordination Action of the European Network of Territorial Intelligence
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Coordination Action of the European Network of Territorial Intelligence

First periodic Report
March 2006, 1st – February 2007, 28th
Scientific Report

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Summary

This report is the scientific part of the first periodic report, the section 1 concerns the project objectives and the major achievements during the first reporting period, and the section 2 is linked to the workpackage progress during the first period.

The section 3 is the "First periodic management and financial report"(deliverable n° 2), it describes the consortium management and the CAENTI financial issues.

SECTION 1 – PROJECT OBJECTIVES AND MAJOR ACHIEVEMENTS DURING THE REPORTING PERIOD

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 general project objectives

CAENTI, as a general objective, aims at integrating current research projects on tools of territorial intelligence so as to give them a European dimension.

It wants to promote three comparative research studies to design and spread tools, methodologies and research protocols that are accessible to the researchers in social sciences and to the actors of territories sustainable development. It also wants to constitute applicable data sets for multi-field research and for territorial development.

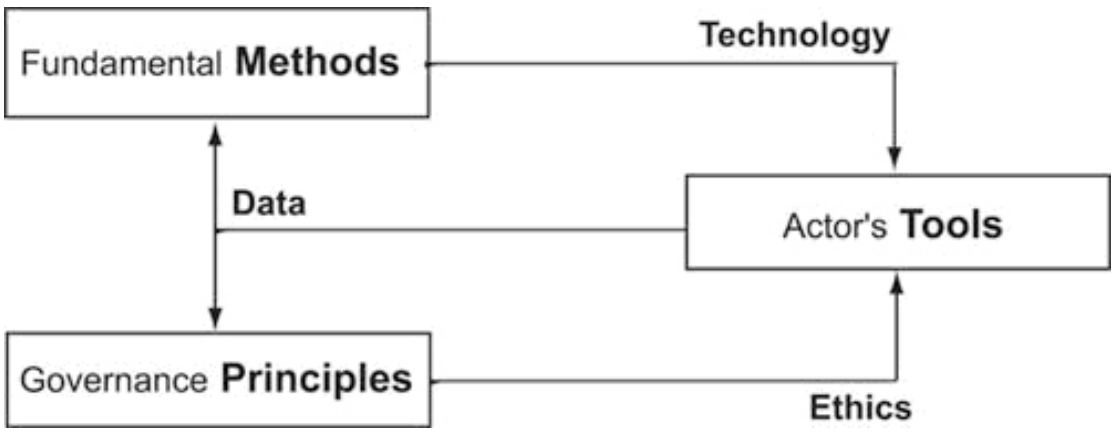
The CAENTI consortium brings together the Franche-Comté University (UFC, France), the Huelva University (UHU, Spain), the Liege University (ULG, Belgium), the Pécs University (PTE, Hungary), the Alba-Iulia University (UAB, Romania), the Salerno University (UNISA, Italy), the Scientific Research Centre of the Slovenian Academy of Sciences and Arts (ZRCSAZU, Slovenia) and the Tunghai University (THU, Taiwan). The territorial observatories ACCEM (Spain), OPTIMA (Belgium) and INTEGRA Plus (Belgium), the Besançon ADAPEI (France), the Jardins de COCAGNE Network (France), the VALDOCCO Foundation (Spain) and the province of BARANYA (Hungary) also take part in the project.

Three comparative research activities will be implemented as work packages:

- Spreading of fundamental methods and research design in territorial information analysis within the social sciences and humanities
- Analysis of the application of the principles of governance of sustainable development in the territorial research-action
- Design and dissemination of territorial intelligence methods and tools that are accessible to the territorial actors and respectful of the sustainable development ethics.

These three research activities are strongly complementary. The activity of dissemination of fundamental methods provides useful technological means for the design and the modelling of tools that are accessible to the actors under the shape of technical modules and procedures for professional use. The spreading of scientific instruments of spatial analysis and processing of territorial information within the social sciences helps providing useful technological resources and skills for the actors. The activity on the

principles of governance supplies an ethical frame that guarantees that tools which are developed for the actors, as well as their implementation, are respectful of the sustainable development principles.



The CAENTI consortium also organizes a rigorous management of its coordination activities, and two dissemination activities:

- An annual international conference.
- An Extranet and Internet portal also makes the dissemination easier.

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

At the organisational level, each of these activities is a work package with its specific objectives and organisation. The organizational issues are detailed in the deliverable 2 "First periodic management and financial report", so here we just give an overview to explain the WPs objectives. The WPs internal organisation is also described in the WPs parts.

WP1 [MANAGEMENT, UFC] The management of the CAENTI consortium ensures, in a rigorous and convivial way, the legal, contractual, financial and administrative follow-up of the project.

WP2 [CONFERENCE, UAB] The annual international conference is a major event for the CAENTI consortium, in terms of integration and joint action visibility.

WP3 [PORTAL, UFC] The Extranet and Internet portal also contributes to the integration dimension within the CAENTI and to its visibility.

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

1. Improving the diffusion of the methods and fundamental tools of spatial analysis and the processing of territorial information within social sciences.
2. Increasing the use of territorial indicators.
3. Defining the territory concept in the multi-field context of the integrated approach and defining the competitiveness indicators in this approach.

This work package animates five scientific coordination research activities:

- Inventory of the fundamental methods of territorial information.
- Comparative inventory of the European territorial information.
- Evaluation of the projects that are funded by the European Commission and of the information in the DGs, in the field of territorial intelligence.
- Concept of territory and site specification process.
- Indicators of territories competitiveness.

These coordination activities are divided into two annual tasks: a state-of-the-art in 2006 and a comparative research in each field in 2007. A synthesis will be performed in 2008.

WP5 [GOVERNANCE PRINCIPLES, UHU] Analysis of the application of the principles of governance of sustainable development in territorial research-action activity. The main objective is to perform a joint deliberation of all the partners about their research practices, in terms of territorial intelligence, considering a comparative analysis among them. It aims at:

1. Stating the impacts, potentialities, risks and constrains of the application of the governance principles to territorial sustainable development.
2. Ensuring, through a suitable European Letter of Quality, ethical principles and conditions to be respected in the development of research projects.
3. Defining technological developments that encourage the practical implementation of cooperative research principles.

In order to identify and disseminate the best practices that inspire the territorial governance within the scientific production (theoretical approaches, technical tools design, and information gathering processes), then to establish a set of rules or standards to be fulfilled by this specific kind of research activity. The WP5 will make a catalogue of experiences in 2006 and a letter of quality in 2007. 2008 will be devoted to the principles dissemination.

WP6 [TOOLS FOR ACTORS, UFC] Conception and dissemination of methods and tools of territorial intelligence that are accessible for the territorial actors and respectful of a sustainable development ethics This activity essentially aims at giving a European dimension to research actions which are widely engaged at a local level, or even at a national scale, on technical tools for the actors and on territorial data sets. That will be done in three steps:

1. Harmonizing CATALYSE tools at the European level in the “CATALYSE Toolkit”, in 2006.
2. Putting online CATALYSE tools that are based upon a “Inclusion Itinerary Accompaniment File” IIAF, in 2007.
3. Specialising the portal on European institutional indicators that are useful for actors, in 2008.

Studying the feasibility of a European Observatory of School is another coordination activity that is planned within the WP6.

We have eight research coordination groups to carry out this work. They are detailed in the WP6 part.

The results we got in this first period are important. The first six months were rather devoted to organisational tasks that quickly allowed starting the whole coordination activities we planned, as at the global results level, as at the results of every work package level (the latter ones will be studied later).

During the kick-off meeting, on March, the 23rd and the 24th 2006, the consortium participants met. Mrs Andrea SCHMOELZER, Scientific Officer of the project for the European Commission, also attended the meeting.

We have actively prepared the Consortium agreement since the beginning of the action, and we debated it during the kick-off meeting. Then, it was signed on April, the 10th 2006.

The Intra-consortium website and the cooperative space CooSpace have been usable since the action beginning and were finalized in June of 2006.

All the work packages and most of the coordination groups had had a scientific coordination meeting: in HUELVA on the governance principles on May 2006, in DURBUY on the tools for actors in June 2006 and in AIX-EN-PROVENCE at the beginning of July 2006 on the fundamental methods and on the European Observatory of Elementary School. These coordination scientific meetings allowed detailing each group objectives, defining the approaches and methodological protocols and a research calendar. The cooperative work on CooSpace started at that occasion. It prepared a debate on the first results in ALBA IULIA, so as to organize the drafting of the first year reports.

The scientific thinking started quickly too. At the beginning of June, a new definition of territorial intelligence was suggested by Jean-Jacques GIRARDOT within the framework of the Sixth days "Information and Communication Technologies " that were organized in Besançon on June, the 8th and 9th 2006 by the laboratory I3M "Information Médias Milieux Médiation" of the University of South, Toulon Var and by the so-called Maison des Sciences de l'Homme Ledoux of the UFC.

"Territorial intelligence is the cognitive process that communities work out to guarantee the equitable and sustainable development of their territories.

It compares and integrates the multi-field and intercultural knowledge on territorial structures and dynamics.

It adapts the fundamental methods and generic tools of wide applicability to analyse the territories and the territorial information.

It valuates the governance principles that guarantee a well-balanced taking into account of all the needs, as well as the equitable distribution and the resources durability, thanks to partnership and participation.

It designs and makes tools with the territorial actors who would like to develop their territories, whilst respecting these ethical principles."

I3M and the MSH, that are the two major laboratories specialized in territorial intelligence in France decided to actively collaborate on several projects, and especially to organize the Seventh days "ICT and Territories" in 2007 in Lyon on the issue of the territorial intelligence ontology. Philippe DUMAS, Director of I3M and Yann BERTACCHINI, news editor of the online review ISDM, were invited to the International conference of territorial intelligence of ALBA IULIA.

During a scientific coordination meeting that gathered the leaders of the research WPs and of the coordination groups of WP4 Fundamental Methods, the WP4 and WP5 goals were detailed thanks to questions:

For the WP4 Fundamental Methods:

Which are the methods, protocols and generic tools of wide applicability that are used to analyse the territories and the territorial information within humanities and social sciences?

How to improve their diffusion within humanities and social sciences?

For the WP5 Governance Principles:

What are the best practices in the research action that inspire territorial governance whilst respecting sustainable development?

Which ethic principles, standards and research designs should be fulfilled by the territorial intelligence research actions and tools?

The **International Conference of Territorial Intelligence** took place from September, the 20th to the 22nd 2006 in Alba Iulia (Romania). It gathered 110 participants, 80 CAENTI members and 30 other researchers, coming from seven countries: Belgium, Spain, France, Hungary, Italy, Slovenia and Taiwan. Among them, 69 presented a paper. The "Acts of the Annual International Conference of Territorial Intelligence ALBA IULIA 2006" (deliverable n°12) were published in July 2007 (with a delay mainly due to the translation revision) with 11 papers on CAENTI activities and 26 submited papers.

The advertisement and call for papers for the next conference that will take place in HUELVA on the theme "Territorial intelligence and governance" was published at the end of January 2007.

The works of the workpackages are detailed in the section 2 and are summarized in the executive summary. As this summary is a separate document, we also indicate here the global workages work and results.

During the first reporting period, the **WP6 [TOOLS]** aimed at defining the specifications of a CATALYSE Toolkit, from the CATALYSE method that has been used for several years by most of the CAENTI participants in multi-sector observatories that use similar tools but gather different information contents.

The CATALYSE method suggests three tools that allow confronting three information kinds:

1. A multi-sector **diagnosis and evaluation** guide to gather individual information about people's needs, so as to define and measure **needs** profiles.
2. A **services repertory** to list the existing services on the territory that aim at satisfying the people's needs and the community groups.
3. A **territorial information system** (TIS) that integrates socio-economic **territorial indicators** provided by specialized statistic institutions.

Measuring and defining needs and services profiles and then globally and territorially confronting them allow designing services that can satisfy the needs and evaluate the organizations and actions that provide these services, at the individual and territorial levels.

The free and friendly software PRAGMA, ANACONDA, NUAGE and SITRA are used for quantitative, qualitative and spatial data analysis in order to measure and compare the needs and services importance and localization and their main profiles in the territorial community.

The CATALYSE diagnoses, evaluations or observations, are generally initiated by an actors multi-sector partnership, to better know the individual and collective needs and to act together in a more efficient one. An operational actors group selects the guide questions, then coherently defines the repertory information and the territorial indicators. A technical and communication team, the "observatory", processes and animates the data analysis. The operational group ranks the needs profiles. *Ad hoc* workshops deepen the needs analysis and

evaluate services, so as to create joint projects of new or reestablished services. As regards the project teams, they draft projects.

During the first period, the WP6 defined contents specifications of a CATALYSE Toolkit from experiences of the CAENTI observatories. It did not aim at doing a turn-key product, but at making a synthesis of the experiences in a touchstone.

- It compared the diagnosis and evaluation guides that are used by the CAENTI participants to present a European guide, in conformity with the existing European standards.
- It detailed the questions and modalities meanings of this guide.
- It offered an online services repertory, with corresponding information.
- It started selecting territorial indicators from socio-economic European indicators. It should achieve this selection with European, national, and possibly regional, indicators that are available at the local level.

The WP6 progressed much with the data processing tools.

- It wrote conceptual, methodological and technical specifications for PRAGMA. It implemented a first "collect" version, that was simplified as regards the data collecting functions. Since May 2006, it has allowed starting an experimentation of the CATALYSE Toolkit with the ACCEM Spanish "migrants" guide. It started computing the specifications for the PRAGMA multi-platform version.
- It defined the technical specifications for the integration of the quantitative and qualitative data analysis software (PRAGMA, ANACONDA and NUAGE).
- It wrote the technical and computing specifications for a free online repertory and a Territorial Information System. It progressed much in advance on the planned work, by designing a Territorial Intelligence Community System.

The WP6 also compares the practices and uses of the CAENTI observatories concerning the contents and tools, in order to plan joint recommendations.

- It defined the data analysis and data processing protocols for the European guide.
- It compared five observatories and three observation mechanisms, so as to draw recommendations to use the CATALYSE method in a development partnership.

The WP6 will coordinate the CATALYSE Toolkit execution, thanks to the Spanish experimentation. The TICS concept lays the basis of the future periods work, because it 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 and development partnership uses.

The **WP4 [METHODS]** aims at improving the dissemination of the spatial analysis and territorial information processing methods and tools within the HSS, and at increasing the territorial information use. These objectives are divided into five scientific coordination activities that correspond to the five WP4 coordination groups.

To answer the question "Which generic methods used by social sciences to study the territories can provide tools to help territorial actors better managing their territories?" the **WP4M [Methods]** coordination group worked about generic methods of wide applicability. The WP4M firstly studied three kinds of methods: spatial frameworks where space is divided into discret spatial units, simulation of the territories spatial dynamics and GIS.

During the next period, the WP4M will complete the information management thanks to a GIS and then explore the spatial interpolation methods, in order to generalize spatial data, and work on a meta-method: the territories observation.

The **WP4I [Information]** identified the main sources of territorial information that are available for the researchers in Europe, at the European, national, regional and local levels.

It studied the statistical information that can be gathered on European and national Internet websites, and selected the indicators and themes that can be used within the HSS and by the CAENTI actors. For each country, it searched the lower spatial level for which the indicator is available and the most recent data. It evaluated the comparisons possibilities.

The next research actions will include the identification of the indicators use conditions, the collection of metadata information and the comparison with the UN sustainable development indicators and the Agenda 21 contextual indicators.

The **WP4P [Project]** is linked to the evaluation of the projects that were supported by the European Commission (EC) and belong to the territorial intelligence field. It also searched the relevant information of the General Directions (GDs) of the EC have concerning territorial intelligence.

By crossing the research modes and the sources with key-words of territorial intelligence, the WP4P selected 45 European research and action projects. As regards the relevant information, it worked with the WP4I on the information that are published on the official websites.

The WP4P will contact the selected projects responsibles soon, to choose the most relevant ones, in order to invite them with the CAENTI actions responsibles to a comparative seminar. It will also ask the GDs of the EC to identify the relevant information they have about territorial intelligence which could complete the Internet inventory made by the WP4I.

The **WP4T [Territory]** compared the different disciplinary approaches of territory and studied the territory specification process ("territorialisation" in French). It identified five key-elements concerning the territory: it is a resource set; it is a « construction »; it looks towards future; it can produce specific « territory effects ». On a territory, tensions between local and global dynamics produce multiple and interactive networks.

It will now finish the pluri-disciplinary comparative research action, by increasing the connections between space and human community. To do so, it will use the appropriation, feed-back, project, identity and patrimony concepts, in order to present in HUELVA an operational inter-disciplinary definition that will be relevant for sustainable development.

The **WP4C [Competitiveness]** aims at identifying the factors of the territories competitiveness and the most relevant indicators of the territories competitiveness.

It defined and studied the competitiveness factors that influence the regions development: economic structure, innovation, accessibility (physical-infrastructural accessibility and accessibility to ICT), qualified human resources, social factors and cultural and natural environment.

It already started evaluating indicators of the territories competitiveness and some research actions in Hungary and it will continue in 2007.

The coordination groups of the work package 4 started drafting states-of-the-art and inventories about the multi-disciplinary approach of the territory concept, the generic methods used to study and manage the territory, the territorial information available on Internet for researchers and actors in Europe, the factors and indicators of the territories competitiveness and the European projects that belong to the territorial intelligence field.

The **WP5 [GOVERNANCE]** main commitment is the debate about the ethical and methodological principles which should be respected by the research protocols of human and social sciences, in order their results favour the governance of territorial sustainable development.

During this first period, the WP5 decided to perform an analysis of the CAENTI members research experience and, on the basis of this experience results assessment, to debate about the principles that inspire the practices of the research activity, so that it will genuinely

contribute to the governance development. Based on a comparative analysis of the six universities catalogues of experiences, the report: "Application of the sustainable development governance principles to the territorial research-action" is a thinking on the application of the sustainable development governance principles to territorial research-action.

In the decentralising processes of the State power, the main challenge that is faced by the territorial governance architects is to make a complete use of all the potentialities the present society offers. Territorial governance is presented with the challenge to realize that "territorial engineering" takes advantage of and effectively stimulates the "organisational capacity of the whole social organisation", in order to manage providing appropriate answers to the citizens' democratically expressed needs.

All the institutional complexity involved in the processes of power spaces reconfiguration was expressly recognised by the European Union in 2001 with the publication of *White Paper on European Governance*[1]. The WP5 started drawing up a normative framework relating to research applied to economically, socially and environmentally territorial sustainable development. The WP5 wants to put this principle in practice, in connection with the fulfilment of the principles which refer to good governance.It raises the question of the person who should produce, interpret and disseminate the knowledge and also of the way its has to do it, in order to design and democratically manage sustainable development policies.

By articulating the concepts of territorial governance and territorial intelligence, the WP5 formulated a series of principles which should be respected by the applied research-action protocols of territorial development, so as the research processes and results allow promoting a good governance in a knowledge-based society: transformation, multi-dimensionality, partnership, participation, sustainability, transparency, co-responsibility, co-evaluation and co-learning.

During the next period, the WP5 will draft the European quality letter of research-action favouring the territorial governance of sustainable development.

The **WP3 [PORTAL]** objective is to contribute to the visibility and dissemination of all the CAENTI activities and results, towards the greatest number. The first works and results of the network are already published on this territorial intelligence portal.

The WP3 also provides the CAENTI with a protected Extranet (Intra-consortium website) and a cooperative workspace (CooSpace) that answer one of the activity integration objectives and allow working daily together between two meetings.

To meet the organization needs of the international conferences, the WP3 integrated a conference management software. Advertisement and call for papers were published, an online diffusion of the international conference in Alba Iulia was organised and the conference acts were also published on the portal.

The territorial intelligence portal restructuring implied a deep work during the latest months. At the end of February 2007, an improved version of the Intra-consortium was launched. A new version of the Internet portal, accompanied by many services, will be put online for the scientific community and the general public, in September 2007.

The **WP2 [CONFERENCE]** organised the International Conference of Territorial Intelligence, which is the CAENTI consortium major event, in terms of integration and joint action visibility.

The Scientific Committee and the Organisational Committee were defined in the consortium agreement.

[1] *White Paper on European Governance*. COM(2001) 428 final from 25.7.2001.

The WP2 published the advertisement and call for papers of the Conference of ALBA IULIA (Romania) at the end of March 2006. This conference was organized by the University "1er Decembrie 1918" on the theme "Region, Identity and Sustainable development" in September 2006. The Acts include 11 papers on the CAENTI activities and 26 submitted papers.

At the end of January 2007, the WP2 published the advertisement and call for papers for the next conference that will take place in HUELVA in October 2007 on the theme "Territorial intelligence and governance".

The **WP1 [MANAGEMENT]** managed the CAENTI consortium. Eight meetings took place during the project first year. During the first one, the kick-off meeting, three day-to-day management structures were set up: the Project Secretariat, the Steering Committee and the Innovation and Dissemination Manager. At the same period, three Internet-based instruments were implemented: an Internet portal, CooSpace and an Intra-consortium. Thanks to these six facilitators, the results of the first CAENTI year were important, as regards the management and the research activities. The consortium composition has remained unchanged, except the Innovation and Dissemination Manager function, which responsible is being replaced.

During the CAENTI first period, it reached its financial objectives. Indeed, the total engaged efforts amounted to 147,95 persons/months. It is more than 30 units superior to the foreseen involvement. As regards the budget, the consortium spent 98,58% of the planned one for this period. The main costs were manpower, and then travel. The consortium financial performances should be underlined. Nevertheless, we realized that it is indispensable we make adjustments in the distribution of the EC contribution within the consortium, to better answer each partner's needs.

As regards the lists of milestones, the latter are simple in the CAENTI. The initial management milestones were the end of reporting periods for management reports, and the middle of the reporting periods for the mid-term progress reports. The end of the civil year is a milestone for the scientific reports. The International Conference of Territorial Intelligence is the time for each workpackage to present its research activities progress, evaluate the results, debate the prospects and prepare the scientific reports. Plannings are presented in the deliverable n°2, and we remember there the deliverables of the next period.

1.3. Most important problems encountered during the period.

As mentioned in the deliverable n°2, most of the contractors did not foresee the manager's need of financial documents (C forms and audit certificates). As a consequence, the project secretariat had to ask for them several times and to help many organisations to get them. All these steps required much time, especially since we discovered at this occasion that some contractors, which thought having an auditor, did not actually. Finding a genuine one took some more months.

We lose much time with translations. It provokes a jam at the coordination level, because the translation abilities were insufficient to respect the delay and because many mails were sent to make the control. This difficulty was particularly important in the WP2 with the publishing of Acts, the WP5 and the WP6 that gather numerous information from participants and actors in various languages and that have a great number of reports to coordinate. Intermediary regional coordinations were a first solution, particularly in the WP6. All the meetings were organized in three languages : English, Spanish and French and some regional workshops were also organized. We also asked each CAENTI participant to have translation

force to English, in order to get rid of the translations jams at the coordination level. The situation is not perfect yet, but it is already much better.

As mentionned in the deliverable n°2 (first periodic management and financial report), the most important change in the consortium management is the departure of the Innovation and Dissemination Manager. He participated to the orientations definition upstream of the project and started working within the consortium, but then he left his job in the University of Huelva. Consequently, he had to resign from his function in the CAENTI project. He could not deliver the first IDM report, that is why we will present all the works we made in this field from the beginning of the project in the report of the second reporting period. We are presently working, so as he can be replaced shortly.

Most of the deviations encountered in the workpackages and that are presented in the section 2, result from these difficulties.

1.4. General propects of CAENTI for next period

Even if we faced these problems, we did not plan to change our work programme. Is is true we have a serious delay for the first delivering of the annual reports, but the research activities have continued as planned, and we will be able to give the following reports and deliverables in time.

Besides, we only internally adapted the workprogrammes, as described in the section 2.

An external consideration will provoks changes in our organisation and evolution: the Project Management Conference that was organized by the Research Directorate-General of the Commission of the European Union. Independently from the information that were given on the project management through brief and detailed presentations and debates with the Commission staff, the presentations of actions demonstrated the importance to start preparing very soon a project of Network of Excellence, which can prolong a Coordination Action. We enter such project in the scientific project of the Institute of Humanities and Social Sciences and it received a good evaluation from the French National Center of Scientific Research (CNRS). We will not already focus on this project, but valuate the requirements that we have to integrate in the CAENTI objectives and activities from now on, as well as the preparation tasks we have to plan, to be able to present an ambitious project of Network of Excellence project in 2009 within the 7th Framework Program.

- Deeply integrating the research activities of the partners, whilst encouraging innovation.
- Modifying the management, so as to increase visibility and dissemination and to guarantee the network durability
- Integrating new dimensions (training, transfer, publishing).

Integrating the participants research programs implies an effort that overcomes the research activities coordination, in order to define a common research program in a participative and transparent way. We should modify the research axis in a coherent way with the results that were reached by the CAENTI research activities. It is imperative to attract the most performing research teams, to support the few performing teams, to integrate the researchers beyond the teams, to select the best researchers within each participant and to associate teams.

By "encouraging innovation", we think about implementing calls for projects, integrating young researchers (doctorants and post-doctorants) and making seminars and Internet forums that would be defined according to the scientific news. We should also create an independent scientific council, implement evaluation procedures among the partners, define excellence standards within the network, and develop the CAENTI Innovation and Dissemination Manager function. That is why, with the CNRS help, we are looking for an IDM who is experienced in the Ingeenering Sciences.

The management issue is fundamental. To answer the requirements of a Network of Excellence, we will have to progressively diversify the management tasks (administration, finances, communication) whilst dissociating management and scientific coordination (integration and coordination activities execution, research activities execution, innovation, dissemination, knowledge transfer). We will have to combine the top-down interaction for the financial aspects and the bottom-up one for the scientific aspects. *A priori*, it will be useful to promote the constitution of a Steering Committee for each research axis and for each activity (or work-package). Dissemination is also a need that implies animating a very living portal and developing a specific cell for communication and dissemination, to associate the dissemination relays and diversify the audiences: scientifics, editors and scientific media, political stake-holders, institutional responsibles, professionals and firms, medias and civil society. The management should especially guarantee the network durability from the project phase, by developing the project visibility for the persons who fund it and for the public, by developing a strategy to get funding, and by diversifying the funding by answering international, European, national and local calls for projects, so as to fund the network during the project preparation period.

A Network of Excellence project also implies integrating new dimensions beyond research activities: training, transfer and publishing in general. We think about developing Internet transfer services between universities and actors. Several projects are already in progress.:

Presently, we are writing a project of European master of territorial intelligence. During the CAENTI kick-off meeting, the President of the University of Franche-Comté announced his will to support a European master within the framework of the four-year project. The geography section wrote a first project. This thinking associates the universities of HUELVA (Spain, a Professor of this university was invited by the University of Franche-Comté for two months), of PECS (Hungary), of LIEGE (Belgium) and of ALBA IULIA (Romania). We would like to make online training modules that will aim at providing teaching units for this master and new trainings for young researchers and professionals.

The 6th annual meetings "ICT and Territories" started connecting the online review ISDM and the CAENTI consortium. Yann BERTACCHINI, the news redactor, will be invited to the next Annual conference of Territorial intelligence to present the online review ISDM.

Other prospects are presented in the section 2 within the workpackages framework.

But we also analyse transversal evolutions.

The first one concerns the scientific communication issue. It can be integrated to the WP3, in order to gather the editorial medias with the portal, as the projects of digital edition, or more globally edition. It means communication that is a function of WP1 will become a WP3 one. We should also think about paper edition, that is presently in the WP2, but only as concerns the edition of the conference acts.

There are now strong links between the WP4 and the WP6 on the territorial information issues, like the selection of relevant and useful information and the meanings definition.

We should also establish links between the WP4, the WP5 and the WP6 on the uses issue. The WP5 gathered research-actions examples. The WP6 started an inventory of the CATALYSE observatories and deepened observatories experiences. The WP4 surveyed European projects which are relevant in the territorial intelligence field. The theme of the territorial information uses and of the territorial tools also became important within the CAENTI.

SECTION 2 – WORKPACKAGE PROGRESS OF THE PERIOD

2.1. Workpackage 1 [MANAGEMENT] Management of the consortium. Workpackage. Workpackage leader: Amélie BICHET MIÑARO, Université de Franche-Comté (France)

The deliverable 2 "First periodic management and financial report" presents the information about this workpackage.

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 toward objectives, the deviation for the project workprogramme, the list of deliverables, the list of milestones and the prospects for the next period.

2.2.1. Workpackage 2 CONFERENCE objectives and organisation

The annual international conference has several objectives:

- Gathering all the consortium members in order to exchange the information about the year, have debates, and guarantee the transparence of the project through common decision-makings. Each work package is invited to make a balance of its work of the year and to enlarge its thinking state to the whole consortium members.
- Allowing detailing and tuning the territorial intelligence concept that is in the project heart by plenary debates that are led after the presentations that are made by the WP4 members and by the persons who are invited to make presentations about this theme.
- Confronting the researchers' and actors' vision.
- Collectively valuating the efficiency of the organisational devices and of the tools to share information and make a collaborative work (Internet portal, Coospace).
- Collectively valuating the publishing devices of the works results, either online or under paper shape, to inform the consortium members, and more generally the scientific community that is interested in the project problematics.
- Guaranteeing the scientific work quality by formulating advice for the Scientific Committee, year after year, according to the works progression
- Favouring the contacts and the collaboration with other international research teams in order to constitute a European network of excellence in 2009.

We planned three conferences within the CAENTI project, by referring to the project starting date (March, 1st 2006). The annual international conference allows knowing more about the works that were made by the WPs during the year first part (from March to September-October). It indicates the beginning of the works diffusion and exploitation phase (from March the 1st to March the 1st) and a new starting point to continue them during the next year. It is a major device that allows drafting annual balances.

The first annual international conference took place in Alba Iulia in September 2006. The second conference will take place in Huelva in October 2007 and the last one will take place in Besançon in October 2008, according to the calendar you will find above.

Each year, the programming plans:

1. The publishing of the provisional program and of the call for communications at the latest on January, the 1st

2. The conference preparation

3. The conference in September or October

4. The acts publishing at the end of December.

To make the annual international conference a success, three Committees were created:

WP2S Scientific Committee (UAB, Ioan Moise ACHIM)
WP2O Organisational Committee (UAB, Mihai PASCARU-PAG)
WP2P Publishing of Acts (UAB, Ioan ILEANA)

2.2.2 Workpackage 2 CONFERENCE progress towards objectives

The activities were made in a remote way, in the framework of the consortium agreement preparation, after we agreed on the principles during the Kick-off meeting that took place in Besançon on March, the 23rd and 24th 2006. Communication and cooperative work were made thanks to Coospace and Php my conference.

The annual international Conference of territorial intelligence that was took place from September the 20th to the 22nd 2006 was organized by the University "1er Decembrie 1918" of Alba Iulia on the theme "Region, Identity and Sustainable development" with three topics for thematic workshops:

1. Is region the most appropriate space to think sustainable development?

2. In the framework of regional identity construction, what are the problems, the experiments and the good practices?

3. Which methods and instruments must be used to implement the territory sustainable development?

The coordination research activities that were made within the CAENTI WP4, WP5 and WP6, were organised in separare workshops, independently from these thematics.

As planned, the WP2 published the "Advertisement and call for papers of the Annual International Conference ALBA IULIA 2006" (deliverable 11) at the end of March 2006.

The committees were defined in the consortium agreement.

The **International Conference of Territorial Intelligence** took place from September, the 20th to the 22nd 2006 in Alba Iulia (Romania). The "Acts of the Annual

International Conference of Territorial Intelligence ALBA IULIA 2006" (deliverable n°12) were published in July 2007. The delay was mainly due to the translations revision. These Acts include 11 papers on the CAENTI activities and 26 submitted papers.

The Bureau of the Scientific Committee met in Besançon, France, at the end of October 2006, in order to validate the papers of the Conference of ALBA IULIA and to establish the scientific coordination of the publications (Internet, printed volume).

The WP2 published the "Advertisement and call for papers of the Annual International Conference HUELVA 2007" at the end of January 2007, as it was planned.

The next conference will take place in Huelva from October, the 24th to the 27th 2007. Its specific theme is "Territorial intelligence and governance". This Conference will aim at presenting, debating and disseminating the WP5 main issues, that is to say the analysis of the application of the sustainable development governance principles to the territorial research-action. This conference of 2007 will equally focus on the debate about the standards and norms that should be used for this kind of research activities. The CAENTI works will be presented so as to establish quality criteria in the research activity that is led in cooperation between scientific teams and ground actors who are involved in the economic, social and environmental development.

The following paragraphs present the Scientific Committee, the Organizational Commitee and the Committee that is responsible for the acts publication.

Scientific Committee

The Scientific Committee is representative of the whole consortium, and as a consequence of the Conference participants.

The Scientific Committee is composed of a five-member Bureau and of 21 other members.

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 Spain.

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, associate 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.

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) C.N. Ledoux UMS-CNRS 2913, 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 6049, UFC France.
3 Hervé RICHARD, Ph.D., director of research, head of research unit of Chrono-Ecologie UMR-CNRS 6565, UFC France.
4 Luc GRUSON, professor of management, director of the CNHI "Cité Nationale de l'Histoire de l'Immigration" (National museum for immigration history), UFC France.
5 Blanca MIEDES UGARTE, PhD, associate professor of labour economics and active employment policies, representative of Universidad de Huelva, leader of WP5 Governance, UHU Spain.
6 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.
7 Guénaël 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 University of Liège, leader of the research group on territorial information in WP4, ULG Belgium.
8 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.
9 Serge SCHMITZ, associate professor of geography, specialist in cultural and political geography, ULG Belgium.
10 Csilla FILO, assistant professor of sociology, representative of the University of Pécs, leader of the WP4 fundamental methods, PTE Hungary.
11 Zoltan WILHELM, Ph.D., senior lecturer in geography, director of RTTD&ICT "Research Team on Territorial Development and Information & Communication Technologies", PTE Hungary.
12 Ioan ILEANA, PhD, professor of computer sciences, leader of the acts publication of the Annual International Conference of Territorial intelligence, UAB Romania.
13 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 University of Salerno, UNISA Italy.
14 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.
15 Yves ALPE, PhD of sociology, member of the "Observatoire de l'École Rurale" (observatory of rural school), UNISA Italy.
16 Kristof OSTIR, Ph. D., researcher, representative of the Scientific Research Centre of the Slovenian Academy of Sciences and Arts, ZRCSAZU, Slovenia.
17 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.

18 Julia FERNANDEZ QUINTANILLA, general manager and representative of the Associación Comisión Católica Española de Migración (Spanish catholic commission association for migrations), ACCEM Spain.
19 Jean-Marie DELVOYE, manager and representative of the community observatory Optim@ "Observation, Participation, Territory, Integration, Methods, and Action", OPTIMA Belgium.
20 Christiane MARECHAL-RULOT, manager and representative of the inter-communal observatory Intégra Plus, INTEGRA Belgium.
21 Jean-Guy HENCKEL, manager and representative of the association "Réseau Cocagne", COCAGNE France.

The Office emanes from this group and it plans the meetings and the work organization.

The Scientific Committee :

- Validates the call for communications,

- Valuates the communications proposals

Organisational Committee

The Organisational Committee is made up by 7 permanent members, who work with a local committee for each conference.

Permanent members:

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

The Organisational Committee devoted to two tasks :

- The organisation of the Conference of Alba Iulia : travels management, housing and restaurant, rooms and material booking, drafting and publishing of the descriptive program, relations with the local collectivities

- The Conference of Huelva preparation that was validated in Alba Iulia

The local Organisational Committee also committed to look for local partners and sponsors.

Publishing of acts

The Editorial Committee, that is in charge of the acts publishing, is composed of three members :

1 Ioan ILEANA, leader of the acts publication
2 François FAVORY, UFC
3 Dolores REDONDO TORONJO, UHU.

The conference documents will be published in a book which will have an ISBN.

Concerning the acts publishing, the Editorial Committee has several functions:

- Definition of the main communication rules (the communications validation is made by the Scientific Committee).

- Contact making with ISDM to have an online publishing.

- As a consequence, definition of the patterns for the articles presentations (abstracts) that were put online on Coospace at the beginning of August 2006 for ALBA. We used a more complete pattern since January 2007 for HUELVA conference.

2.2.3. Workpackage 2 CONFERENCE deviations from the project workprogramme

We take an important delay with the publishing of the acts of the conference due to the translation problems we mentioned previously in 1.3. They were others problems with the Internet solution we used that did not worked correctly for the evaluation of papers. We finally developed a more operative solution to manage documents in the Intra Consortium.

Another reason is that the scientific committee is too large to be efficient. The constitution of our project Scientific Committee and its composition methods make each workpackage and research group is represented through its leaders and the representatives of the main research centres.

The Scientific Committee also have too much functions. Initially, its main purpose of the Scientific Committee consists in validating submitted communications for conference and papers to publish. But the activity of such a large committee is irregular. Some member answered fastly, but we waited for others. The Scientific Committee was also solicited to validate other scientific meetings and to evaluate the research activities of the coordination action. Considering the project of NoE, we will need an external Scientific Council with scientific personalities. The function of the Scientific Committee increased. They also are different functions. The same committee cannot do all these tasks. We have to separate with *ad hoc* committees.

Considering the scientific organisation of the conference of HUELVA, a specific committee will be in charge of the selection of communications and papers. It will be constituted with people that are free of other charges during the periods of selection. The people who have charges with coordination activities have not *a priori* the good profile.

About the Organisational Committee we also preferred a small local team preparing the work of the Scientific Committee.

2.2.4. List of the workpackage 2 CONFERENCE deliverables

Del. n°	Deliverable name	WP n°	Date due	Delivery date	Estim. P/M	Used P/M	Lead contrac-tor
11	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 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
					8,4	16,9	

2.2.5. List of workpackage 2 CONFERENCE next milestones

Del. No	Deliverable name	WP n°	Lead participant	Estimated person months	Nature	Dissemi-nation level	Delivery date
14	Acts of the Annual International Conference of Territorial Intelligence HUELVA 2007.	2	UHU	4	R	PU	24
15	Advertisement and call for papers of the Annual International Conference of Territorial Intelligence BESANÇON 2008.	2	UFC	3	O	PU	23
16	Acts of the Annual International Conference of Territorial Intelligence BESANÇON 2008.	2	UFC	4	R	PU	36

2.2.6. The prospects of workpackage 2 CONFERENCE for next period

The WP2 activities will continue as planned, but the WP2 is now in charge of submitting a series of concrete measures that aim at optimizing the Scientific Committee activities and the Organisational Committee ones, regarding the conferences of HUELVA (2007) and BESANÇON (2008).

2.3. Workpackage 3 [PORTAL, UFC] The Extranet and Internet portal. Work package leader : Cyril MASSELOT, University of Franche-Comté.

This part was written with the concourse of Eddy PETIT (UFC MSH LEDOUX), Anne PIPONNIER (UNISA OER), and Peter ACS (PTE, Hungary). It presents the workpackage objectives and organization, the progress toward objectives, the deviation for the project workprogramme, the list of deliverable, the list of milestones and the propects for next period.

This activity essentially aims at contributing to the visibility and dissemination of all CAENTI activities and results towards the greatest number. This is the territorial intelligence portal vocation. We will present:

- The WP3 objectives, starting point of work and organization at the CAENTI action beginning
- The activities during the first project period, the progress toward objectives
- The deviations and corrective actions taken
- The list of deliverables
- The list of milestones
- Prospects and comments

2.3.1. Workpackage 3 PORTAL objectives and starting point of work

The first version of the territorial intelligence portal (www.territorial-intelligence.eu) was born on March, the 1st 2006 that was the CAENTI starting date. From this moment on, the work consisted in improving the tools that compose it.

The objectives of communication towards the general public are to inform on the CAENTI research activities, on the various participants topicality and on the events that are linked to this project.

The scientific papers objectives are to present the scientific bases of the thematic we worked on, as well as the work progression, and the research activity results we carry out, according to an objective of mediation without vulgarization.

A third objective is to establish an actors' network around territorial intelligence.

The WP3 also provides the CAENTI with a protected Extranet (Intra-consortium website) and a cooperative workspace (CooSpace) answering to one of the activity integration objectives on which the coordination action is based. The Intra-consortium website is reserved to the Coordination Action participants. It proposes a services range related to the consortium management and to internal communication services. The cooperative workspace offers a space for information exchanges and cooperative work, which must reinforce the consortium integration. These tools allow daily work between the meetings.

The Intra-consortium website was worked out and parameterized from March, the 1st to June, the 30th 2006, like it's explained in the implementation report of the Intra-consortium website.

Wp3 also works with the Wp2, having the responsibility to assist the scientific and organisational committees, with advertisements and call for acts contribution and publication.

The Wp3 implements the communication strategy, which is in charge of the acts edition and their online publication.

2.3.2. Workpackage 3 PORTAL progress towards objectives

The general coordination portal is made by the University of Franche-Comté (UFC, France), the extranet development task was implemented jointly by UFC and PTE (University of Pecs, Hungary) and the definition of the digital edition strategy of the contents is coordinated by UFC and UNISA (University of Salerno, Italy) in the Editorial Committee.

The evolution of the project of territorial intelligence portal needed a specific administration function consisting in both technical maintenance and editorial works, with the servers maintenance, the new services development and the contents management.

The activities were organized in 3 specific teams: "Editorial Committee" (WP3E), "Multimedia programming and integration" (WP3M) and "Contents" (WP3C). Beside these three main fixed poles, people are organised in workgroups like "CooSpace improvement", "Intra-consortium roadmap", "Internet communication strategy" and "Conferences editorial coverage". These groups can change and allow an efficient brainstorming. These groups use the extranet (Intra-consortium) and the cooperative workspace (CooSpace) to coordinate.

The general restructuring of the territorial intelligence portal started an important and deep work during the latest months. The new version of the Intra-consortium is presently available for the CAENTI members. A new version of the portal, paired by many services, will be put online for the scientific community and the general public, in September 2007.

The WP3 sub-activities during the period were:

- Territorial intelligence portal development and administration
- Portal editorial activity management
- Editorial Committee activity management
- Extranet (Intra-consortium website) management
- Internet services development
- Cooperative workspace (CooSpace) administration and management

2.3.2.1. Territorial intelligence portal development and administration

The project was developed in two successive phases:

The first phase consisted in designing a prototype of sustainable site for this date. The site included an institutional presentation of the project and of its objectives. The contents were drawn from the "Declaration Of Work" and rewritten according to the digital edition needs. It also included the Coordination Action participants presentation and a display system of present events (news). In parallel, the cooperative work platform, CooSpace, started working.

The second phase was devoted to the portal improvement, according to a double point of view: on the one hand, answering the needs we knew in advance (they were subordinated to the existing elements) and on the other hand, setting-up new services, in particular the development of the Intra-consortium website and the cooperative workspace improvement.

2.3.2.2. Portal editorial activity management

The supply of the Internet portal mainly concerns the publication of the works and of the network results. The first results obtained by the CAENTI are published on the portal:

- State-of-the-art about fundamental methods and tools of spatial analysis and of processing of territorial information within the social sciences and humanities (Deliverable n°23).
- State-of-the-art about of territorial information available on internet and sources in Europe (Deliverable n°24).
- State-of-the-art about EC projects and DG information (Deliverable n°25).
- State-of-the-art about the concept of territory and the process of territorialisation (Deliverable n°26).
- State-of-the-art about the notion of competitiveness of territory (Deliverable n°27).

The portal is also fed by news from the CAENTI partners. 32 news concerning the actors, the researchers and the CAENTI activity and the latest evolutions in the territorial intelligence field were published in eight languages. To feed the portal news, the leader of content animates a correspondents' network which is constituted by the CAENTI actors and researchers.

2.3.2.2.1. Design of an editorial charter

The first main objective of the activities to be led was to develop an editorial charter (See annex 1 in report Deliverable n°19) for the CAENTI portal, in order to create attractive and readable contents and to keep the site coherent with multiple contributors. The first stage consisted in implementing the ergonomics and web drafting principles. It was important to standardize the contents management and to have common rules, in order to homogenize the territorial intelligence portal contents.

2.3.2.2.2. Conferences visibility and publication of conferences proceedings

The Annual International Territorial Intelligence Conferences aim at regularly gathering the whole project consortium members, so as to increase the consortium integration. They also aim at widening the visibility of the territorial intelligence concept, and especially of the CAENTI activities. They are the subject of an intense communication strategy, particularly through the Internet portal, to attract papers of high quality as well as the largest audience possible among researchers and territorial actors.

These deliverables were published on the territorial intelligence portal:

- Advertisement and call for papers of the Annual International Conference Alba Iulia 2006 (deliverable n°11).
- Acts of the Annual International Conference Alba Iulia 2006 (deliverable n°12).
- Advertisement and call for papers of the Annual International Conference Huelva 2007 (deliverable n°13).

We organised an online diffusion of the international conference of territorial intelligence in Alba Iulia (September 2006).

The online publication of the conferences proceedings is made by several ways. Contacts were created with the scientific on-line review ISDM[2] of the laboratory I3M[3] of the University of the South (Toulon, France) to publish the international conference acts.

2.3.2.2.3. External communication

Thanks to external communication, CAENTI activities and territorial intelligence notion are known. The WP3 worked on the diffusion of the CAENTI events on scientific websites (more specifically on the regional gateway websites) and agendas, and on the creation of a partners' network link.

2.3.2.3. Editorial Committee

The Editorial Committee is in charge of designing the territorial intelligence portal evolution. It defines its editorial objectives, its graphical charter and its technical specifications. Its function is also to evaluate the portal use, to suggest adaptations and new services according to these uses evolutions. Every six months, it provides an internal evaluation report and evolution proposals to the Steering Committee and to the Innovation and Dissemination Manager.

We use different free statistics tools to monitor the portal use. For the first statistic period (March 2006 to October 2006), we used PHPStats. For the second statistic period (October 2006 to February 2007) we also started to use Google Analytics.

The editorial committee meetings took place at the occasion of meetings that were organized within the CAENTI for other WPs:

- WP6 in Durbuy, June, 29th and 30th 2006
- WP2 in Alba Iulia September, from 18th to 23rd 2006

The editorial committee activity is usually remote. It will develop when the portal will enter its editorial phase.

2.3.2.4. Intra-consortium website management

To reinforce the consortium management, an extranet site was developed. The Intra-consortium is directed to the CAENTI partners. It is a tool of first choice to organize the work and to manage the information and knowledge that result from the latter. We worked on the Intra-consortium to be able to launch an improved version at the end of February 2007.

We used e-groupware[4], an open source web-based collaborative groupware software solution. These are the functionalities we were able to implement in the Intra-consortium website by using e-groupware:

- A new look & feel with an informative home page including "what's new"
- A powerful group calendar with meeting request system and ACL[5] security. It is possible to partly or totally share several calendars.

[2] Permanent online journal of Information and Communication Technologies, http://isdm.univ-tln.fr/
[3] http://i3m.univ-tln.fr/
4 http://www.egroupware.org
[5] An access control list (ACL) is a table that tells a computer operating system which access rights each user has to a particular system object, such as a file directory or an individual file.

- A participant address book available for updates or look ups from anywhere. Participants can share contact information with other ones. E-groupware allows making links between documents, persons, events calendar…
- A searchable knowledge base. It is an important tool that allows getting the knowledge of the CAENTI consortium, to organize it and to share it.
- A wiki[6] that is an effective tool for mass collaborative authoring.
- A documentary base.
- The Intra-consortium allows connecting external applications, such as our conference management system.

2.3.2.4.1. CAENTI extranet strategy

During this period, we defined an extranet strategy. The extranet primary purpose is to support the staffs to do their jobs and to help them perfrom the common tasks. The Intra-consortium is meeting these fundamental purposes: content, communication and activity. The extranet is established as a communication channel and as a memory for the consortium content. It is a reference point for the CAENTI community members. It provides each member with CAENTI official documentation and information on the work progress.

The extranet also plays a valuable role as a communications channel, which includes all the staff. This is characterized by the news section ("What's new?") on the extranet home page, which is used to communicate key-news items and updates.

The extranet is more than a mere dumping ground for documents. It is a place to work. This focus on activities - on helping staff to make tasks - includes online applications, such as ConfTool, collaborative tools, and much more. These tools allow the staff making some of its day-to-day work on the site.

The extranet requires dedicated time and effort to keep it in good shape. This requires a devoted team. The Intra-consortium is managed by two extranet managers, the leader of the work package 3 and the leader of contents. It allows guaranteeing the link with the top management and the editorial committee and having a good content strategy. The team is also composed of a person who is in charge of evaluation and of another who is in charge of web design, architecture information and usability.

The creation of a practices community around the extranet allows gathering the hard core of the extranet team, as well as voluntary persons and users of the extranet. As a whole, this group has the responsibility to underline the problems and to solve them, by using the users' experience. The experience proved that this type of groups has a critical importance on the extranet success and that it can make much to succeed in the challenges concerning the contents drafting and management in a decentralized environment.

2.3.2.4.2. Designing the extranet roadmap

The extranet was developed by stages, to ensure that clear benefits can be delivered to the staff as quickly as possible. The extranet needs a clear direction, strategy or roadmap. The "Extranet-concept" (See annex 3 in the Deliverable n°19 report), published by the WP3 team, explains the extranet advancement state, where it is going and what this means in the short-term, as regards actual deliverables. This charter aims at planning the improvements we envisaged for the next 6-12 months.

[6] A wiki is a web application designed to allow multiple authors adding, removing, and editing content.

2.3.2.4.3. Accompanying the uses

The taking into account of the need to accompany the uses as well as the projects progressively materializes by new uses, new roles, new structures where the extranet-managers should actively play their role. Among these new concepts, the use control is interesting because it always emphasizes the uses, what tends to encourage people granting attention.

Going from the extranet work control to the extranet use control is making extranet a "permanent project" aiming at delivering a service which evolution is determined by uses. In order to do that, the extranet team makes regular usability tests, especially on new contents, new pages, new interactions or new applications.

2.3.2.4.4. Measuring the extranet use

The extranet is the conjunction of a technological tool and of a procedures system. It is necessary to wonder about the device qualities and defaults, the nature and the origin of the noted dysfunctions, the roles of the contributors and the organization degree.

The diagnosis concept is rather simple when it is linked to the perception of the extranet tool, from the point of view of its technical choices, its fitting reality, its development and its functionalities. However, it is more complicated from the operating modalities analysis.

Statistics allow apprehending the contents use. The basic indicators are the daily connections number, the time average which is spent on the platform and the number of produced documents. It is a crucial point to manage the extranet and to follow its global use, to identify the problems, and to support continuous improvements.

Based on a critical review of the controls and procedures, the extranet audit (extranet review) aims at leading to processes implementation evaluation and appreciation. A review gives a good indication about the current work state and provides directions concerning what should be done next. We use the Intranet Review Toolkit (www.IntranetReviewToolkit.org.) that provides intranet managers with an easy-to-use method of assessing the strengths and weaknesses of their extranet. It contains a substantial set of heuristics (guidelines or criteria), allowing a detailed extranet review that focuses on a wide range of functionalities, design and strategies. The complete result of the Intra-consortium review is available in the Intra-consortium documentary-base.

2.3.2.4.5. Drafting of guides, policies and procedures

The extranet gives access to guides, policies and procedures for the extranet. These documents concern the extranet design and management, writing standards and other editorial norms (communication rules and norms to add news). For example, the intranet charter (intranet concept)[7] puts everyone on the same page by stating the intent and the expectations upfront and spells out the objective and purpose of the intranet. It also describes behaviours that conform to the objectives and those that do not conform to the latter ones.

The extranet also provides educating and training contents to authors to enable them to learn and practice the art of writing for the intranet.

2.3.2.4.6. Marketing the extranet

[7] Intranet concept : See annex 1 in D19 report

Every available opportunity is used to market the extranet. Active marketing does not only make people aware of the extranet but also maintains the excitement and opens a wider channel for debate and feedback. The WP3 actively looks for opportunities where the extranet could assist other activities, or deliver benefits to the organisation.

Several means are used:

- News, the newsletter and the editorial that are periodically published on the portal are efficient means to help all the members getting aware of this tool potential.
- Print and pin-up posters around the facilities that showcase what's available on the intranet.
- Posters published in conferences.
- Extranet experts who can talk to common users and provide support when it is necessary.

2.3.2.5. Development of the necessary Internet services

2.3.2.5.1. Mailing lists management

We use Mailman[8], a free software to manage electronic mail debate and e-newsletter lists. Mailman is integrated with the web, making it easy for users to manage their accounts and for list owners to administer their lists.

We manage:

- one mailing list by WP
- one mailing list by sub activity of each WP (in the majority of the cases)
- a lot of mailing list dedicated to the management: for all the CAENTI partners, or for local partners (i.e. one for UFC members…) etc
- many mailing lists dedicated to the events management: for the conference in Alba Iulia, for the organization of the conference in Huelva…

On the whole, we have forty mailing lists, and more than 200 emails were managed by this tool during the first year.

2.3.2.5.2 Conference management system

To meet the organization needs of the international conference of Alba Iulia (September 2006), we integrated a software of conferences management which is called PhpMyConference[9].

During the event management we met some difficulties bound to the tool and consequently we looked for other solutions. Eventually, we chose to use ConfTool[10]. It is a web-based conference management system that was developed to support most administrative tasks of conference organizers. ConfTool integrates the submission/review-process, as well as the participants registration, invoicing and many other tasks.

8 http://www.gnu.org/software/mailman/
9 http://sedre.loria.fr/phpMyConference/index_help.html
10 http://www.conftool.net/

After integrating ConfTool on the territorial intelligence portal and on the Intra-consortium, we organised the communication about the tool and made a guide (see annex 2 in D19 report)

2.3.2.6. Cooperative workspace (CooSpace)

The cooperative workspace, CooSpace is managed by the University of Pécs (Hungary) and is developed by Dexter. It has been in progress since March 1st, 2006, and evaluated, to be definitively operational, before the end of June 2006 (cf. Deliverable n°18).

The cooperative workspace, CooSpace offers a space for information exchanges and cooperative work. The aim is to reinforce the integration of the consortium, to constitute a "virtual laboratory" and to answer the organization needs of the research activities.

Contrary to the Intra-consortium which is reserved to the CAENTI members, CooSpace allows associating external researchers and actors (associate members) to the CAENTI work.

Presently, CAENTI community scene has 232 members.

Specific activities related to the interface use took place:

- execution of an instruction manual for the CooSpace WP leader
- translation of this handbook in Spanish and French, then broad diffusion
- execution of a CooSpace presentation for all the participants
- launching of a reflexion on the execution of a teaching support for fast training of the interface handling
- launching of several reflexions on the CooSpace development, some new modules to be made according to the needs, the interface ergonomics, help with the interface translation

From the starting-point of the project, we are working on CooSpace development:

- first, we went trough a test and bug report
- we had chat debates on the development and possibilities issues, and exchanges by emails
- we introduced a new CooSpace version in the middle of the last period; it includes bug corrections, new features, and corrected translations of the English interface
- some training also took place
- we collected and assessed use statistics

The development process focused on tuning. In the last period the development work continued. Here are the most important changes and modifications:

- The multi-lingual version has been introduced in active use
- Changes were made to promote the intuitive use for participants
- New features were introduced
- Bug were corrected

- New features were introduced in the test

2.3.3. Workpackage 3 PORTAL deviations from the project workprogramme

During the period, we met two types of difficulties. The first one was linked to technical problems, the second one concerns the network editorial animation.

Before using a portal solution, we made sure we had the needed skills in the structure and the concerned persons had experiences in similar projects. But one departure in the team complicated the Intra-consortium development and the multi-language management on the Internet portal. To respect the deadlines, we activated others resources in the network.

To prepare the first international conference of territorial intelligence in Alba Iulia (September 2006) we used a conference management software that simplified the event management. But we met difficulties due to the software limitations. Once again, we activated resources in the network to compare and choose better software.

The second type of problem is linked to a human factor. The information and collaboration systems objective is to allow getting the greatest quantity of cooperation that is possible. The most difficult part was to make people use the system. In order to address this problem better, we are developing the team skills as regards: debate forum animation, newsletters publication to inform, management of the interactions between several remote colleagues, efficient communications by email, remote management of multi-project tasks with multi-transverse or horizontal teams, rights management and remote recognition…

It is also necessary to take into account the cultural differences which exist between people, teams and organisations, in the intercultural cooperation. In an organization, within the same entity, there are also cultural differences which can for example be linked to the seniority in the organisation, to age…

Until now, the WP3 team mainly worked in a remote way. But the communication and data processing functions, closely related to these activities, will lead us to organize at least a meeting, or maybe two, per year. The implementation of the editorial chain on a European scale requires attendances to meetings, exactly like the development of a real communication plan.

2.3.4. List of the workpackage 3 PORTAL deliverables

Del. n°	Deliverable name	WP n°	Date due	Delivery date	Estim. P/M	Used P/M	Lead contractor
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
					11	26,2	

2.3.5. List of the workpackage 3 PORTAL next milestones

Del. No	Deliverable name	WP n°	Lead participant	Estimated person months	Nature	Dissemination level	Delivery date
D20	Second periodic portal editorial report.	3	UNISA	1,5	R	CO	24
D21	Final portal editorial report.	3	UNISA	1,5	R	PU	36
D22	Territorial Intelligence Portal.	3	UFC	13	O	PU	36

2.3.6. Prospects of the workpackage 3 PORTAL for next period

The development of the Territorial Intelligence portal suscited an important interest of researchers of the digital edition master of the university of Franche-Comté. It was possible to carry out an important work that was planned later, it contribued to give to the CAENTI Internet tools a good maintenance and to get a good portal sooner than planned. We should now improve the portal editorial functions, in order to increase the portal uses and contents.

2.3.6.1 Restructuring of the territorial intelligence portal

After the first period in the portal development, corresponding to what we can call an "institutional" portal, we launched a restructuring process aiming at transforming it in an editorial portal, by adding editorial functionalities such as RSS, newsletters…

Designing a successful gate portal implies to make a useful tool, as for the general public as for the scientific community, the journalists or the organizations.

The new site which is going to be put online in September 2007 will benefit from the following improvements:

- Revision of the home page which plays an essential role for the visitors. We worked on the logics of visual routes, the identity (colour, design, and messages), the simplification of the access to the various linguistic versions and the conception of effective entry according to the visitors profiles (general public, press, scientific community).
- Implementation of an internal search engine, it is essential to support the accessibility to information and documents that are on the portal.
- Improvement of the downward, ascending and transverse circulation, by stressing the available marks during a visit (titles, breadcrumbs, map of the site). Simplification of the access to the contents by combining access modes (textual links, icons, search engine), by facilitating the identification of links, by working on the titles relevance and the management of the entrants and outgoing links.
- Improvement of the "News and events" feature (collaborative publication and archives management). The portal will allow the staff adding news with a general workflow management activated by the user: When an article is created, an announcement is sent to the portal editor which approves or not the publication.

- Improvement of the address (URL) display (better referencing in search engines)
- Adding of a newsletter subscription functionality
- An information syndication (RSS) subscription that will allow the participants, but also a larger audience, being regularly informed of the innovations that are published on the portal, not only the news but also activities and research results.
- A site on territorial intelligence should be accessible to the handicapped persons. We are working on following diverse directives of accessibility like the ones that are presented by the W3C (WAI).[11]
- The territorial intelligence portal will quickly evolve to a meta-portal which will be able to include several dedicated web portals, what is essential to give access to some scientific resources (like image data bases) or to offer specialised services (such as a portal on territorial indicators available on the Internet). Hosted by the MSH technological platform (UFC), the portal will be able to access to many specialized servers.
- The portal will also be able to mobilise information available on "syndicated" web-sites (particularly those of the Coordination Action members).
- It will give access to personalised services and tools and offer personalised workspaces.
- It will also be a community centre for activities of training, expertise and advice, what implies the constitution of a companies and experts network that is able to deliver these services. The development of online services should allow developing small service companies, which role will be to hold an intermediate function of advice in the various sectors of the territorial development scheme.

2.3.6.2. Editorial activities prospects

2.3.6.2.1. Online diffusion of the conferences

We need to improve the first try in Alba Iulia (2006) by the implementation of a distributed servers system. A server will make the conferences digitalization in real time and several servers (one by country would be the ideal, but 8 or 9 could be enough), connected to the first one, will broadcast the video. This system will allow downloading each server and thus increasing the number of possible simultaneous visitors.

2.3.6.2.2. More editorial vision of the site

The new version of the portal is going to allow developing the range of the editorial contents presented by the site (Editorial, newsletters, cover in direct time of Huelva in 2007, videos…)

For example, the new information architecture will allow each partner highlighting the article it wants on its presentation page As a consequence; they will have a genuine visibility window on the IT portal.

[11] The World Wide Web Consortium (W3C)'s Web Accessibility Initiative (WAI) is an effort to improve the accessibility of the World Wide Web (WWW or Web) for people with physical disabilities.

We will use more dynamic writing style for contents. Next to the traditional index form, more dynamic articles will be made to present the structures in a more concrete and more attractive way. The journalistic style will be put in contribution, with interviews and reports on concrete projects.

The portal of editorial activity will also concern:

- the execution of virtual conferences
- the publication of a documentary base, which will be specialised in territorial intelligence
- the publication of a directory of the territorial intelligence European actors (actors, activities, experts, skills)
- the publication of training supports
- the online publication of the territorial intelligence tools made by the CAENTI (and other organizations) with accompaniment services (notes, advices, training)

2.3.6.2.3. Project of territorial intelligence review

The consortium is also working on a project of territorial intelligence review. Our approach still consists in opening up to the public. We trust in superiority of the integral text, wide accessibility and simplicity. Integral text is the only future of the electronic publication. Any restrictive policy of online publication confine the Web in the role of *electronic shop window*, it limits its editorial potential and its capacity to participate to the scientific exchanges, as well as to the knowledge democratization.

By respect for the hyper-textual functioning of the Web and by fidelity with the scientific practices, we consider it is necessary to present for every article an Internet address relatively simple, unique, and if possible unchanging. So, it becomes possible to quote, including in a paper publication, a clear reference for every information that is found in our review.

In every document, the contents must be structured. Title, author, summary, publication date, etc. will be identified as such (as "meta-data"), what allows not only a reasoned page formatting, but also a better contents indexation by the search engines. Several solutions are presently studied.

2.3.6.3. Editorial committee prospects

We want to improve our analysis of the feedback provided by users. The team will lead more regular usability tests and provide the users with several opportunities to provide feedbacks. For example, a feedback form at the bottom of all intranet pages could be used to rate and send feedback to the intranet team.

We will also use a multi-disciplinary method to evaluate the information systems, the portal and the Intra-consortium. This method, worked out by the team Territorial Intelligence of the laboratory ThéMA (UFC), allows managing at once: usability tests, semiotic and uses analysis, didactic approach and qualitative evaluation of publics.

2.3.6.4. Intra-consortium prospects

We are working on a Single Sign-On (SSO) [12] system. Thanks to SSO it will be possible to gather all the requests for authentication in a single procedure. The users' comfort and the safety level will be improved.

There are two main reasons to set up a SSO solution. The first one is the users' comfort and as a consequence their work efficiency. The second SSO motivation concerns the infrastructure and the software architecture. The SSO allows building a portal that is composed of multiple independent bricks, in perfect transparency for the user. It will be particularly useful in anticipation of the services which will be offered by the portal.

2.3.6.5. Internet services Prospects

Territorial intelligence tools designed by the CAENTI (and other organizations) with services (notes, advice, training) will be published. The list above presents the next internet services the CAENTI will develop:

- **Implementation of a system of virtual conferences:** The idea is to be able to organize virtual conferences in relation with the CAENTI thematics and to broadcast them online on the territorial intelligence portal. Specifications are being studied.
- **Publication of training supports:** CAENTI will implement training modules (for in-room and online use) about the methods and tools of territorial action for researchers in the social sciences and humanities, territorial actors, students. They will be produced with the help of professional training services of universities, inside and outside the consortium.
- **Put online of the CATALYSE tools on the base of an "Inclusion Itinerary Accompaniment File":** A prototype of the European online Inclusion Itinerary Accompaniment File will be presented. All the documents and tools will be published on the portal; a space will be dedicated to the Catalyse Toolkit, to be able on one hand to consult and download the documents, and in the other hand to use the developed computing tools, in their online and standalone versions, according to a precise procedure.
- **Portal on institutional territorial indicators available on the Internet in Europe:** The expected result is to strengthen the dissemination of the CATALYSE tools, of the use of the territorial intelligence tools with the online file, and of the use of territorial indicators and territorial data sets. The actors must quickly know with which institutional indicators they can compare their data at a local and national scale. The goal of the web portal is to direct actors towards the useful indicators for their action.
- **Publication of a repertory of the territorial intelligence European actors:** This repertory of actors allows describing the various actors and actions of the territorial development: addresses, intervention fields, received public, proposed services, intervention zone, etc. It allows preparing a paper publication of the directory if needed, but especially it can be online consulted and updated. On the base of this repertory, the Catalyse method suggests a typology of the actors

12 Web Single sign on strictly works with applications accessed with a web browser. The request to access a web resource is intercepted either by a component in the web server, or by the application itself. Unauthenticated users are diverted to an authenticaton service and returned only after a successful authentication. (wikipedia)

and actions that are made and a confrontation between them and the users' needs (cf. WP6) to deduce the missing actions or to examine the coherence of the local development device.

2.3.6.6. CooSpace prospects

CooSpace will continue to benefit from future improvements. After the project development, the spotlight is now put on the use and the monitor participation. The most important sup-objective is to tune the system in order to improve benefits.

Promoting the system use:

- Before, the information use (material introduction)
- After the login, training and help (renewing it)
- Tune the user interface for an easier intuitive use

Planned functions:

- The system toolbar is still being developed. Our goal is to widen it and to create a multi-lingual surface.
- New, more clear design and functionality
- Easier and extended document management.
- Improving the chat
- Help for translation in several languages

2.3.6.7. Comments

Firstly, we can say that a portal development project is an extended task that has to be apprehended in a pragmatic way. Our choice to improve the territorial intelligence portal step by step, allowed us receiving more adhesion than with a Pharaonic project for which we would have to wait too much time.

Moreover, an application or a service is only justified by the interest and the utility it has for a user and we know both by experience and research that users' involvement in a portal project is far from being obvious. Indeed, an extranet manager expertise consists in his ability to continuously animate his collaborators. We use the word "animation" because in the network structure, the activation results less from the stimulation by the hierarchy (activation that is known as "directed") than from a kind of more or less controlled initiative.

Concerning the Intra-consortium, we can make a comment: The success of an extranet depends on its animation quality. Technology appears as secondary and remains a "means". We are strongly aware that an extranet without any communication logic may irremediably fail. It is necessary to solicit the partners in real time to make the portal live, in terms of contents, to perceive the users' new needs and to adapt the portal services. This is the part we will concentrate on.

Social sciences provide an invaluable help to understand the professional environment we want to manage thanks to the extranet. That is why it is important to mobilize and take into account concepts that result from social psychology, sociology and anthropology. By using these elements and the tasks permanent improvement, we will more and more focus on the usage and the human factor.

In order to do that, we want to extend our analytic capacities and to also monitor the extranet. We will implement a system allowing the users giving us feedback on their extranet

use. This is always important but more particularly when the extranet is used by a staff from different countries, different cultures and different work habits.

For our project, using open source[13] software is a big asset. Apart from economical reasons, the goal we have whilst using only open source software is to have a fundamental control and flexibility advantages, since it is possible to modify and maintain our own software as we like.

Lastly, it is essential for an institution that would like to get a portal-site to implement a kind of research and development cell that essentially aims at identifying the permanent evolutions in this field, understanding their interest for the project and the actors, testing them and, if necessary, designing and developing new suitable solutions. This kind of task never ends.

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 FILO, 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. 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, the list of milestones and the propects of the WP4 and of its coordination groups for the next period.

2.4.1. Workpackage 4 METHODS objectives, work starting point and organization

The WP4 has the following objectives:

1. Improving the dissemination of spatial analysis and territorial information processing methods and tools within the Humanities and Social Sciences. They are wide applicability methods and tools such as geographical and spatial analysis information systems, qualitative and quantitative data analysis and professional tools info metrics used by the territorial actors.

2. Increasing the territorial information use. In parallel, these methods and tools help to improve the territorial data use, within the Humanities and Social Sciences, where their dissemination remains limited and unequal depending on disciplines. An analysis of European Commission relevant projects and existing information in the DGs that might be relevant to the field would be useful to avoid working on topics which had been previously dealt with.

3. Defining the concept of territory in the integrated approach multi-field context. The intelligent use of territorial information and its instruments calls for the need to deepen the analysis of the territory concept and the "territorialisation" processes (site specification). We

[13] Open source software is computer software which source code is available under a license (or arrangement such as the public domain) that allows users studying, changing, and improving the software, and redistributing it in modified or unmodified form.

will be particularly interested in the definition of the territory competitiveness indicators in a global approach.

They had been directed within five scientific coordination activities:

WP4M [Methods] Inventory of the territorial information fundamental methods. Leader Serge ORMAUX University of Franche-Comté.

WP4I [Information] Comparative inventory of European territorial information, leader Guenael DEVILLET University of LIEGE.

WP4P [Project] Evaluation of projects funding by European Commission and information in the DGs within the field of territorial intelligence information. Leader Jean-Jacques GIRARDOT University of Franche Comté.

WP4T [Territory] Concept of territory and site specification process. Leader Pierre CHAMPOLLION University of SALERNO.

WP4C [Competitiveness] Indicators of territories competitiveness. Leader Csilla FILÓ University of PECS.

This organisation tried to concentrate coordination on little teams, around one or two universities, for efficiency and according to the participants' excellence skills, except for the WP4P [Project] which objective needed a territorial distribution of researchers.

Research coordination group WP4M [Methods]:

Serge ORMAUX (UFC)

Laure NUNINGER (UFC)

Pierre FRANKHAUSER (UFC)

Cécile TANNIER (UFC)

Alexandre MOINE (UFC)

Blanca MIEDES UGARTE (UHU)

Csilla FILO (PTE)

Nicolae TODEA (UAB)

Iuliana CENAR (UAB)

Kristof OSTIR (ZRCSAZU)

Peter PEHANI (ZRCSAZU)

Tomaz PODOBNIKAR (ZRCSAZU)

Ziga KOKALJ (ZRCSAZU)

Tatjana VELJANOVSKI (ZRCSAZU)

Hsiu-Jen Jennifer YEH (THU)

Fang-Yie LEU (THU)

Research coordination group WP4I [Information]:

Guénael DEVILLET (ULG)

Di CHEN (ULG)

Olga MINGUEZ MORENO (UHU)

Zoltan WILHEM (PTE)

Isabelle STIEVENART (OPTIMA)

Research coordination group WP4P [Project]:

Jean-Jacques GIRARDOT (UFC)

Amélie BICHET MINARO (UFC)

Blanca MIEDES UGARTE (UHU)

Dolores REDONDO TORONJO (UHU)

Serge SCHMITZ (ULG)

Csilla FILO (PTE)

Mihai PASCARU-PAG (UAB)

Natale AMMATURO (UNISA)

Julia FERNANDEZ QUINTANILLA (ACCEM)

Jean-Marie DELVOYE (OPTIMA)

Christiane MARECHAL-RULOT (INTEGRA)

Jean-Guy HENCKEL (COCAGNE)

Maria Isabel FRANCO LIGENFERT (VALDOCCO)

Research coordination group WP4T [Territory]:

Pierre CHAMPOLLION (UNISA)

Giovana TRUDA (UNISA)

Alain LEGARDEZ (UNISA)

Sophie CHEVALIER (UFC)

Manuela DE PAZ BAÑEZ (UHU)

Csilla FILO (PTE)

Ovidiu LUDUSAN (UAB)

Filimon STREMTAN (UAB)

Research coordination group WP4C [Competitiveness]:

Csilla FILO (PTE)

Zoltan WILHELM (PTE)

Csaba Zoltan BERES (PTE)

Manuela DE PAZ BAÑEZ (UHU)

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, as shown in the WP4 planning in the deliverable 2 “First periodic management and financial report”.

As regards the workpackage organisation, small coordinations mettings were organized by the coordination groups.

March 24-25, 2006 Besancon (France) Kick of Meeting (participants on list): Distribution of user and password to CooSpace system, in which we can organize programs, tasks and meetings within WP4

June 7, 2006 Besancon (France) Seminar WP4 for task leaders (participants: J.J. Girardot, S. Ormaux, G. Devillet, Cs. Filó, P. Champollion) : Defining the tasks actions and precising the objectives of each scientific coordination group and the questions each of them wanted to answer.

June 29-30, 2006, Durbuy (Belgium) Seminar WP4 Information [WP4I] (participants on list). WP4P presented the first identification of the research projects using a first series of key-words. It proved itself to be too selective. As regards the projects identification, the coordination group debated about the opportunity to widen the canvassing field to all the fundings, beyond the research activity, and the key-words used to identify projects. The debate insisted on the complexity of the action projects identification. The WP4I group presented the first results about the territorial information inventory from European statistic bases and sites and national sites of the countries that are European Union members. 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 decided together 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 suggested indicators that can be found for 10 European countries on their national Internet site. The retained themes for a first stage were : population, socio-economic conditions, employment and housing.

July 4-5, 2006, AIX-EN-PROVENCE [WP4T] (France). The meeting precised 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?". The group retained a first series of themes :*

- Rural school organization facing demography evolutions, Territorial actors and competences sharing

- The school territorial base

- Forms of school organization, recruitment areas

- Territorialization of educational and vocational offer

- Problematic questions and methodology questions

11-20 of June 6-10 of July University of Pécs (Hungary) [WP4C] (Participants on list) : The team of University (Pecs) presented the WP4 Competitiveness for researchers, students and actors about the following topics:

- Defining the developable territorial unit

- Factors of competitiveness

- The development tools needed to face the challenge

10-15 of October at University of Franche-Comté (France) [WP4]. Groups leaders defined the lines for the WP4 report within the CAENTI project.

16-17 of November at University of PECS (Hungary) [WP4C]. The team of University of PECS organized a scientific meeting about territorial competitiveness where we evaluated the european project and studies in terms of competitiveness.

November 17, 2006, WP4P organized a coordination meeting LIEGE to animate a telephonic meeting in order to concretely determine the orientations previously defined in ALBA IULIA

WP4 use COOSPACE for global cooperation. It created the scene of WP4, then subscenes for WP4 (Methods [WP4M], Information [WP4I], Projects [WP4P], Territory [WP4T], Competitiveness [WP4C], Synthesis [WP4S], with forums. WP4 downed up 22 documents to COOSPACE.

From March to August, WP4 organized the teams research work. On the 7th of June 2006 we adviced questionning what WP4 coordinate within the project.

These questions are:

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 HSS?

In which disciplines are they used? Which European laboratories manage them best? How to improve their dissemination within the HSS?

Which methods can provide modules for the tools design?

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 territories sustainable development?

What are the main comparison difficulties of these territorial information?

WP4P [Project]

Among the projects that were supported by the European Commission, which of them have a subject corresponding to the territorial intelligence questionings? How to select the most relevant projects so as to gather them in a seminar ?

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?

WP4 [Territory]:

What is territory, territoriality, territorialization?

Territory space, network space, community.

Are there different disciplinary approaches of the territory?

What actually is territorial development?

Who are the territorial actors?

What is the relevant territory for the sustainable development?

WP4 C [Competitiveness]

Which are the factors of territories competitivity? (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?

Competitivity governance and territorial marketing.

After this meeting each sub-activity was coordinated by the task leader.

In Annual International Conference of Territorial Intelligence, 20-23 of September 2006 ALBA IULIA Romania, WP4 delivered the following presentations:

Coordination presentations within WP4:

Orientations of WP4 "The spreading of fundamental methods and research design in territorial information analysis within the Humanities and Social Sciences" Csilla FILO Université de Pecs

"Methods and generic tools to study territory and territorial information", Serge ORMAUX, Director of TheMA laboratory, Université de Franche-Comté.

"Territorial information, themes, indicators and sources".Guénaël DEVILLET, Director of the SEGEFA, Université de Liège

"Evaluation of the projects about territorial intelligence that are funded by the European Commission", Jean-Jacques GIRARDOT, Université de Franche-Comté

"The concept of territory and the territorialisation concept". Pierre CHAMPOLLION, Observatory of Rural School, Universita di Salerno

"Territories competitiveness indicators". Csilla FILO, University of Pecs

Moreover in Conference acts some presentations are visible in the theme of WP4.

2.4.1.1. Researh coordination group WP4M "Methods" progress

As objectives, the coordination group is studying the quantitative methods and generic tools that are used by the researchers in social sciences to study territories. These methods can provide tools to help territorial actors with a better management of their territories. So, the first step of our activities involves a state-of-the-art of the methods types usable within this framework.

Such a state-of-the-art requires to define the method concept and to bring out the main kinds of quantitative methods. The exchanges within the group showed us that it is difficult to distinguisch methods, techniques and tools, and file the methods.

Moreover, each scientific domain, indeed each laboratory, has its own conception of these questions and has a partial view on the problem. For the researchers in the Humanities and Social Sciences, the abilities about quantitative methods are very diverse; the levels of practice are also very different. Sometimes these methods are not much used.

Consequently, it is difficult to know what are the use kinds. Questions have been sent to the group members and discussions have been organized during the meetings but a more thorough survey will be necessary.

According to our exchanges and a bibliographical study, it appears that there is a progression from relatively simple methods, like elementary statistics, that are widely practised to sophisticated methods like factors analysis or simulation, that are less mastered. But, in any case, we observe that most of the researchers are conscious of their interest.

Nevertheless, we have identified several sorts of problems:

- Some researchers are still frightened by these methods. It is a problem of training and collective culture, especially in literary disciplines and human sciences (history, philosophy…).
- Others are familiar with these methods but consider that they are like magical tools and draw bad conclusions from theirs analysis.
- Others have a good knowledge of quantitative methods but feel difficulties to use it with territorial actors. The aim of the WP4 is precisely to design tools that are usable by territorial actors.
- Others are practising sector approaches which are not well adapted to territorial problematics. These ones involve both systemic and spatial approaches. Here is the main difficulty of which we would take care.

In the following pages we will present a short classification of quantitative methods that are especially adapted to territorial questions.

All the **results** are presented in the deliverable 23, so we will only give here an abstract of these results. The first step of our state-of-the-art concerns three kinds of methods.

Within the **methods for analyse**, territories are mostly analysed by using spatial frameworks where space is divided into discreet spatial units. Social, demographic, economic or environmental data are aggregated into these units. Statistical methods are then used to analyse the territorial content which is 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 a factors analysis which allows identifying their main structure. Such structure is resumed by factorial axes that are computed and interpreted to "compress the most important part of information contained in the data table. The objective is to summarize the information, by describing spatial units with a simple set of categories. Such an approach is then focused on the observation of spatial units and spatial zoning more than processes and relationships between variables. A territorial typology is a genuine communication tool which leads to show a single map whose interpretation does not need specific knowledge.

The second type of analysis method belongs to the inferential methods, in which the analysis is focused on a precise character that one tries to explain thanks to others characters. This approach leads to compute estimated values of the interest variable and to extract residual values by comparing reality to the model. These residues are extremely important because they show the local specificities of each spatial unit. If these residues constitute spatial aggregates, it means there is a geographical effect, for example a structural opposition between two different cultural regions, or located into different physical contexts.

In the domain of **methods for simulation**, for thirty years, the research in social sciences has been interesting in the elaboration of tools which allows simulating the territories spatial dynamics. These simulation tools were developed thanks to the progress of the computer sciences. The conception of spatial simulation tools involves the modelling of the phenomena which are analysed. Considering the case of spatial simulation modelling, there are two requirements:

- The model should integrate the spatial dimension: material distance, social distance, perceived distance, topological distance.
- The spatial simulation model should allow testing many scenarios according to different assumptions.

Such an approach is very different from traditional approaches which generally consider three scenarios: continuation of the trend, optimistic scenario, and pessimistic scenario.

Indeed, the interest of the spatial simulation is not genuinely its prediction ability, but its ability to test many factors combinations, many interactions types which are too complex to be analysed without any simulation tool. So, a simulation model can be used to develop the knowledge, but also to help the decision-making in the field of territorial management.

WP4 M also worked on **information management thanks to a GIS.** A geographic information system (GIS**)** is a system for capturing, storing, analyzing and managing data and associated attributes which are spatially referenced to the earth. In the strictest sense, it is a computer system capable of integrating, storing, editing, analyzing, sharing, and displaying geographically-referenced information. In a more generic sense, GIS is a tool that allows users to create interactive queries (user created searches), analyze the spatial information, edit

data, and present the results of all these operations. The power of a GIS comes from the ability to relate different information in a spatial context and to reach a conclusion about this relationship. These tools are more and more used by territory sciences, and more particulary within the framework of territorial intelligence and participative governance. That is why we get used to speaking about participative GIS (PPGIS).

A **PPGIS** is an information system coupled with participatory mechanism, mobilizing geographic information and/or geospatial technologies, partly developed by (and for) the public, with the purpose to boost public participation in the context of local land planning and development processes. Public participatory geographic information science is a study of the uses and applications of geographic information and/or geographic information systems technology used by members of the public, both as individuals and grass-root groups, for participation in the public processes (data collection, mapping, analysis and/or decision-making) affecting their lives.

As perspectives and conclusion, the fundamental questions remain those that were decided during the Seminar WP4 of Besançon (June, the 7th 2006) and the conference of Alba Iulia (September, 20th to 22nd 2006), we will first complete the approach of the third point (information management thanks to a GIS) ; then we will explore spatial interpolation methods, which are very important in order to generalize spatial data ; then, we will work on a meta-method, the observation of territories, which bases itself on quantitative and computing methods but also involves specific constructions.

Like for the previous methods, we will work jointly on the methods themselves and on their mode of use.

For that, we will work on the CooSpace forum and we will organize virtual meetings on CooSpace chat. We will discuss of that during the meeting of SALERNO (Italy, May 2007) and the results will be presented at the conference of HUELVA (Spain, October 2007). We will also have a meeting in LJUBLIANA (Slovenia) in spring 2008.

At this stage of the programme, we can say that the transformation of generic methods into territorial management tools constitutes a real problem that is not only a problem of transposition. It leads to reconsider our relations with these methods and their use.

The exchanges with the other members of the network are in this respect absolutely fruitful.

2.4.1.2. Researh coordination group WP4I “Information” progress

The WP4I presented the statistical information that can be gathered on Internet websites. In the context of this work, we select the indicators and themes that can be used within social sciences and humanities and more precisely by the CAENTI actors. We need to consider the data comparability concerning the spatial aspect, the year, the validity and the definition of the indicators. Moreover, another important task consists in finding a common territorial cutting that makes possible the transversal comparison of data between firstly the all CAENTI countries and then between the European ones.

The first step of the work involves the research of indicators that are available on international websites. The advantage of the data found on these websites is the comparability between the different countries. Indeed, each indicator has a single definition for all the countries.

To get a short overview of what has already been done by other territorial projects, three websites were consulted: ESPON; DIACT – Observatoire des Territoires; ETD – Projet

de Territoire. The objectives of this approach are to see what indicators and themes these websites have selected and to compare them with ours. Moreover, it is interesting to list the scientific tools that they have already on line. These projects can also give information about the spatial levels of the available data and the difficulties of gathering indicators. The overall aim is to avoid losing time on work that has already been done elsewhere and to use their experiences to make CAENTI project progress

For the WP4 and WP6 Seminar that took place in Durbuy (Belgium), the 29th and 30th of June 2006. 10 national statistics websites of the European countries were analysed and a first proposition of themes and indicators were presented. For each country, we searched for the presence of the indicators, the lower spatial level for which the indicator is available and the most recent data. All the participants of the seminar received a copy of the proposition and discussions were led to decide which themes and indicators should be retained, rejected, modified or added. The attention was given on the links between the WP4I and the WP6, as the indicators will be used by the WP6 actors. The future steps of the work were determined.

This first proposition was based on

- Availability of data on Eurostat: these data are easier to compare (same indicators, same definitions,…), but they are available only until NUTS 3 level

- Availability of data on national statistics websites

- European questionnaire (made by C. SANCHEZ in the context of the WP6 work)

- Walloon GRD (made by CAENTI Belgium partners, also in the context of WP6 work)

- Context data used by Optima

- Observatory 2004 of Integra

The work was then made for the 27 national statistics websites of the European and CAENTI countries and was presented during the International Conference of Territorial Intelligence hold in Alba Iulia (Romania), the 20th -22nd September 2006. Modifications, suggested during the Durbuy Seminar, were integrated.

All the results are presented in the paper: Territorial information, themes, indicators and sources (WP4I), G. DEVILLET and D. CHEN. We will describe the result in brief here.

The indicators on international websites are various but Eurostat is the only website where regional statistics are present. The reason of the scarcity of data at regional levels certainly comes from the difficulty to compare local territorial units between countries. To remedy this problem at European scale, Eurostat has created the "NUTS" levels (Nomenclature of Territorial Units for Statistics). There are three levels of NUTS: NUTS 1, NUTS 2, NUTS 3. Below these levels, Eurostat has defined the LAU (Local Administrative Units). The two levels of LAU are LAU 1 and LAU 2, also called respectively NUTS 4 and NUTS 5. However, the LAU are not subject to the NUTS regulation. Usually, LAU 2 refers to *communes* (France and Belgium), *Municipios* (Spain)…

During our study on territorial observation websites, we picked out the website of ESPON (European Spatial Planning Observation Network) that shows interesting data for territorial analysis. 4 scientific tools are on line: the Data Navigation, the Data Public Files, the ESPON Hyper Atlas and the ESPON Web-GIS. For France, the website of DIACT – Observatoire des Territoires give a large set of indicators about the country.

Our research on national websites shows that the choice of indicators needs to take account of several parameters. Many difficulties were reported. First, some indicators are not

available. For instance, the personal debt can only be found for Greece (NUTS 0) and Malta (NUTS 3). Data on monthly rent is also often missing. Then, we can note that the spatial levels of indicators vary from NUTS 0 to NUTS 5. Germany has data at NUTS 0 and NUTS 1 levels whereas the data of Denmark are at NUTS 5. We can point out that the NUTS 0 of countries like Germany are very different from the ones of countries like Cyprus. The same comment can be made for the year of data (from 1990 to 2005). Exactly the same indicator is not easy to find, especially for health status. Indeed, some countries use the number of sick persons and injured persons (*e.g.* Germany), some others count the persons with long standing health problems (*e.g.* Austria, Cyprus) and some statistics divide the information into categories: very good, good, acceptable, poor… (*e.g.* Spain, Estonia, Greece). Another important question is the problem of the definition of a term. This occurs with words like *household* or *family nuclei*. Moreover, it is rare to find the same categories for an indicator, for example *the equipments of a household*. And sometimes, indicators are similar but not exactly the same (*e.g* Area of housing _ number of rooms of the dwelling. Finally, we can wonder if our researches will include only raw data or also indicators that need manipulations of data. These remarks led to a major question: which criteria must we take account in first in our choice of indicators: the spatial level, the year of data, the same definition…?

As perspectives, the next step of our researches will include:

- The identification of the conditions of use of data

- The broadening of our researches above the needs of Optima and Integra

- The collection of metadata information about the indicators

- The comparison of our indicators with the UN sustainable development indicators and Agenda 21 contextual indicators

Moreover, the meetings held between the WP teams have led to several thoughts. Above all, they underline the need to work in interactions with WP6 teams. Indeed, WP4 has to search which are the indicators that CAENTI actors need and, on the other side, WP6 have to take account of the availability of the indicators. If some indicators can not be found, it was suggested that the local actors of CAENTI will collect the missing data in the field.

The question of the use of data that need a charge has also been asked. If we accept to pay for some data, until what price CAENTI can spend?

Eventually, we have underlined that the next step of our work should be led with the help of our partners. The creation of a small team next year to go further could deepen the knowledge on partner countries.

In the long run, the inventory is scheduled for 2007 and the final report will be performed in 2008.

As a conclusion, the WP4I presented a state-of-art of the territorial information available on statistical websites. We showed the difficulty to consider at the same time the available data on Internet and the data that the actors of WP6 need. A first problem is to find a common territorial division across Europe that can make able the comparison between countries. This was partly solved by the NUTS division of Eurostat. However, the data available on Eurostat (NUTS 3) are not enough precise, as data at local level (NUTS 5) are more appropriate for the CAENTI project. Thus, a research was done at the national level. Another difficulty underlined is the comparability of the indicators between countries (definition, level of data, year of data, categories of indicators …).

2.4.1.3. Researh coordination group WP4P "Projects" progress

The WP4P working group is linked to the evaluation of the projects that were supported by the European Commission and belong to the territorial intelligence field. It also evaluates the General Directions of the European Commission relevant information that concern territorial intelligence, in addition to those that are published on the official websites.

After the meeting of the WP4 coordination groups leaders in BESANCON in June 2006, a first strategy was defined on CooSpace:

1. Identifying the projects that belong to the territorial intelligence field and dividing them, according to the broad European regions, between the group members, so as they can make a first evaluation report, on the basis of a frame established by the group. These evaluation reports are compared within the group.

2. Asking the general directions to inform us of their information about territorial intelligence that could complete the territorial information that were identified by the WP4I group in the European data bases, especially on Internet.

Consequently, there was a joint coordination meeting of the WP4P and the WP4I in DURBUY at the end of June 2006 so as to reinforce the groups complementarity on the relevant information issue.

In this meeting Amélie BICHET-MINARO also presented the first identification of the research projects made by using a first series of key-words. It proved itself to be too selective. The coordination group debated the opportunity to widen the surveying field to all the funded projects, beyond the research activity. Moreover, WP4P added new key-words so as to identify more projects. The debate insisted on the complexity of the action projects identification. It also concerned the projects evaluation, after they have been selected. The group emphasized the need to contact the projects responsibles, and to meet them.

A projects new selection was presented at the time of the presentation of the WP4 activities and prospects in the International Conference of Territorial Intelligence in ALBA IULIA. Nevertheless, it remained limited; indeed, the inventory of the action programmes was postponed, because it implied to get additional information from the European Commission general directions. We planned to do it at the beginning of the second period. So as to widen the first selection of research projects, we suggested making a new definition of the key-words that are used to identify them. This proposal went together with the proposal of diversification of the research modes, by using the classic search engines on Internet, as well as repertories, data bases and European websites that had already been identified. The direct use of the Internet search engines allows identifying as action projects as research ones. It gives a bonus to the projects that have a good visibility on Internet, without prejudging of their local visibility.

As regards the information that are available at the GDs level, the group decided to wait for the WP4I to have finished the general inventory, before asking the European Commission general directions.

A coordination phone meeting was organized in LIEGE on November 17th, to concretely organize the orientations that were defined in ALBA IULIA. The key-words list was completed and a new protocol of projects selection was programmed, starting from a global research on Internet. This research action and the projects validation would imply a division by countries and by languages. It was decided to make a crossed study between the 17 GDs, the European programmes and the European management of action projects. Then, it will allow deepening the search for research actions through the programmes websites, and

possibly also through contacts with the European management of action projects. If necessary, an archives consultation in Brussels will be made.

At the end of December 2006, a first selection of 45 projects was made by crossing the research modes (repertories and data bases consultation and direct requests on Internet). Nevertheless, all these projects have not been validated yet by the coordination groups members, because of a lack of time.

So members of WP4P will now began to contact the selected projects in order to validate their relevance with territorial field and to select the most relevant in order to organize a seminar with CAENTI actors.

WP4P will also ask the European Commission general directions :

- To complete projects selection with a crossed study between the 17 GDs, the European programmes and the European management of action projects.

- To provide relevant information for territorial intelligence that can complete the the WP4I inventory.

2.4.1.4. Researh coordination group WP4T "Territory" progress

Within the WP4T global framework, five first fundamental questions were made by the CAENTI members (who belong to sociology, education science, information and communication science and geography) at the beginning of the first year, in AIX-EN-PROVENCE meeting, in July 2006. Four of these five questions directly come from the CAENTI global project:

- What is territory? What is territoriality? What is territorialization?

- Are there different disciplinary approaches of territory?

- Is it possible to approach the territory as an interdisciplinary concept?

- Who are the present territory actors?

- What is presently territorial development?

- What are the most relevant territories for sustainable development?

Before this first CAENTI WP4T meeting, the debate has already started between the present CAENTI participants within scientific manifestations from then first seminar of the European Network of Territorial Intelligence in BESANÇON in Septemeber 2003 to the seminar ICT and territories organized by the University of Franche-Comté in June 2006. Initial references have been identified since 2004 in exchange between present WP4T researchers and H. GUMUCHIAN (laboratory "Territoires" UJF-CNRS):

"The word « territory» means two things: either it refers to a legal and administrative reality, as in «national and regional development», or it refers to the concept of «territoriality», which has been very used in the social sciences for twenty years. As much a natural reality as a social reality, territory is not easy to divide. Environment, experiences, representations and social-political-organization are components of a system which parts are interdependent." (GUMUCHIAN, 2001).

A first definition of «territory» in the CAENTI perspective was presented in 2005 by two researchers of the Observatory of Rural Schools (OER) in the RAPPE (Analysis Network of Education Public Policies) seminar of AIX-EN-PROVENCE: "*Places, which are not necessarily adjacent, which are networked, fitted together into changing scales, and that product meaning and identities*" (CHAMPOLLION, POIREY, 2005).

During the CAENTI first year, the comparison between different approaches regarding the territory concept started, within the following four academic disciplines particularly implied in CAENTI : geography, sociology, information and communication science and education science. The results we got are presented in the deliverable n°26.

In the scientific coordination meeting of AIX-EN-PROVENCE (July 2006) a collective thinking allowed identifying five first key-elements concerning the territory concept:

- Territory is a resources whole.
- Territory is a « construction ».
- Territory looks towards future.
- Territory can produce specific effects (« territory effects »).
- On a territory, there are tensions between local and global dynamics and they produce multiple memberships.

The central issue concerns territory and territory specification process ("territorialisation" in French). From "when", i.e. from which organization type and level, a natural or human space becomes a territory? In other words, from which moment the territory specification process is developing?

As adjacent issues, the WP4T identify eight questions;

- Is territory an interdisciplinary concept or only a social science one?
- What are the connections between a specific territory and a country, Europe and the world?
- What are the sustainable development conditions?
- What is the territorial intelligence situation in the territorial sustainable development?
- Is territory necessarily linked to a single community (in this case, we should pay attention to the communitarism danger)?
- Are there connections between territory and inter-culturality?
- Are there multiple identities?
- Is territory a space of projects development built by a community actors?

WP4T will give answers to these questions in 2007. It will allow continuing the scientific inter-disciplinary investigations about territory and territory specification process.

We plan to focus the WP4T future work (in 2007 and 2008) on the study of the territory concept from a trans-disciplinary systemic approach. The variety of the disciplinary references and our first inter-disciplinary thinking already prepared this approach adoption.

In 2007, the WP4T will finish the pluri-disciplinary inventory, by increasing the connections between space and human community through the appropriation, feed-back, project, identity and patrimony concepts. It will also continue the scientific work it led until now about the inter-disciplinary definition of the « territory » concept.

In the general framework of the conference of Huelva preparation, a next meeting of the WP4T will take place in May 2007. It will have four main objectives:

- Completing and making more international the first elements of the scientific bibliography about territory and site specification process.
- Completing the multi-disciplinary approach of "territory" by elements from cultural anthropology, history, political science, ...
- Tuning the first inter-disciplinary definition of "territory" which was started in Aix-en-Provence (2005) and Liège (2005).

- Debating about this definition with the CAENTI territorial actors and with other people, in order the territory concept which was defined by the WP4T researchers can be genuinely usable for sustainable development.

In HUELVA, the territory inter-disciplinary definition will become definitively operational. Consequently, the territory actors will be able to use it for sustainable development.

2.4.1.5. Researh coordination group WP4C "Competitiveness" progress

As regards the WP4C, the main task was to define the competitiveness factors.

- Economic structure (What is the extent of the local economic actors contribution to the region sustainable development and what is its potential to retain population?)

- Innovation (What is the extent of the possible cooperation between local authorities and economic actors to draw the region future?)

- Accessibility (A region development level is broadly determined by its physical-infrastructural and ICT (information and communication technologies) conditions).

- Qualified human resources (The human resources role has been upgraded in the course of the cognitive society expansion and of globalization. Besides, social factors obviously correlate with development potentials in a given area, not so much concerning the active workers number than concerning the training, qualification and professional knowledge, which are presently competitiveness indispensable conditions).

- Cultural and natural environment (how the cultural and natural processes can influence the regions development?)

We evaluated some research actions on this topic in Hungary, as the territory development conceptions of the South Trans-Danubian, Middle Trans-Danubian and West Trans-Danubian Regions, etc.

In 2007 WP4C will continue the analyze of competitiveness factors and indicators, and we will enlarge evaluation of European research actions on territory development.

2.4.3. Workpackage 4 METHODS deviation from the project workprogramme

Some coordination groups like WP4P, WP4T and WP4C are lightly late in their workprogramme, because they did not conclude a general state-of-the-art, but they rather made a CAENTI one. Since they only had 10 months in splite of 12 as it was initially foreseen, and they had to define their internal internal research area and programme, we decided we will evaluate their progress in the second intermediary report.

2.4.4. List of of workpackage 4 METHODS deliverables

Del. n°	Deliverable name	WP n°	Date due	Delivery date	Estim. P/M	Used P/M	Lead contrac-tor
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
					26	31,9	

2.4.5. List of workpackage 4 METHODS next milestones

Del. No	Deliverable name	WP n°	Lead participant	Estimated person months	Nature	Dissemination level	Delivery date
28	Inventory of fundamental methods and tools of spatial analysis and of processing of territorial information within the social sciences and humanities in Europe. map of resources and scientific skills in Europe.	4	UFC	6	O	PU	22
29	Reasoned catalogue of territorial information available on internet and sources in Europe.	4	ULG	5	O	PU	22
30	Report of evaluation on EC relevant projects and DG's information.	4	UFC	7	O	PU	22
31	Report about the concept of territory and the process of ”territorialisation”.	4	UNISA	5	R	PU	22
32	Report about the notion of competitiveness of territory.	4	PTE	6	R	PU	22
33	Final scientific report of synthesis on territorial intelligence.	4	PTE	8	R	PU	36

2.4.6. The workpackage 4 METHODS prospects for next period

The coordination groups of the work package 4 started to draft states-of-the-art and inventories about the multi-disciplinary approach of the territory concept, the generic methods used to study and manage the territory, the territorial information available for researchers and actors in Europe on Internet, the factors and indicators of territories competitiveness, and the European projects belonging to the territorial intelligence field.

Some of these states-of-the-art remain internal to CAENTI and will be widened in the next period. They will be completed by inventories or catalogues, as mentioned in the previous list of milestones.

During the two first periods, each coordination group defined its work program aims as a sub-activity, after their specific issues were jointly determined. Researchers and actors could find his/her place in the WPs. Some collaborations began within the WP4, mainly between WP4P and WP4I coordination groups.

In the prospect of the synthesis of the state-of-the-art planned for 2008, the workpackage coordination will favour the cooperations between coordination groups in 2007. Presently, the WP4T Territory and the WP4M Methods are knoting links. After the WP4P and the WP4C can come closer to the WP4I, because they have common research activities on indicators.

The WP4 starts planning the next WP meetings that will take place in 2007, so as to define tasks and deliverables contents:

A meeting in SALERNO (Italy) will be organized by UNISA on 11-12 of May 2007, we would like to prepare there the second annual conference as far as the WP4 is concerned.

The WP4 is using the opened forums in CooSpace and if it is necessary we will set up new ones. The WP4 will also organize virtual meetings on CooSpace.

Lastly, the WP4 will present its works during the International Conference of Territorial Intelligence of HUELVA, on October 2007.

2.5. Work package 5 [GOVERNANCE PRINCIPLES] Analysis of the application of the principles of governance of sustainable development in territorial research-action. Workpackage leader: Blanca MIEDES-UGARTE, University of HUELVA.

WP5 team's principal commitment is discussion of the ethical and methodological principles which should be observed by the research protocols of Humanities and Social Sciences, in such a way that the results favour the governance of sustainable territorial development. Based on a comparative analysis of the six universities catalogues of experiences, the CAENTI WP5 tries to think about application of the sustainable development governance principles to territorial research-action.

This part presents the workpackage 5 objectives and organization, the progress toward objectives, the deviation for the project workprogramme, the list of deliverable, the list of milestones and the propects for next period.

2.5.1. Workpackage 5 GOVERNANCE objectives and work starting point

This communication summarizes the work and the debates that are being carried out within the WP5: Analysis of the application of the sustainable development governance principles to territorial research-action.

The following researchers contributed to the WP5 works:

Blanca MIEDES UGARTE (UHU)

María José ASENSIO COTO (UHU)

Manuela DE PAZ BAÑEZ (UHU)

Dolores REDONDO TORONJO (UHU)

Laurent AMIOTTE-SUCHET (UFC)

Serge SCHMITZ (ULG)

Csilla FILO (PTE)

Zoltan WILHEM (PTE)

Mihai PASCARU-PAG (UAB)

Emilia PAVEL IVANCU (UAB)

Natale AMMATURO (UNISA)

Tullia SACCHERI (UNISA)

Enrique BARBERO RODRIGUEZ (ACCEM)

Maria Isabel FRANCO LIGENFERT (VALDOCCO)

The WP5 main tasks within the CAENTI framework consists in debating about the ethical and methodological principles that should be respected by research protocols of Humanities Social and Sciences, so as that research results favour territorial governance, and thus the territories sustainable development.

The first scientific coordination meeting of WP5 was held at Huelva University on May, the 5th 2006. This first encounter focused on the coordination activities that could be performed during the first phase of the project (from March to December 2006) and on the debate and agreement on a suitable calendar for the whole project.

Participants agreed to deal with WP5 objectives analyzing and considering their own research practice. In order that each participating university carry out a catalogue of its research projects developed until now.

The main deliverable of this work will be the elaboration in 2007 of a European quality letter of research favouring territorial governance of sustainable development.

During 2008, the practical aspects of the quality letter principles application will particularly be focused on those regarding the use of information and communication technologies in the research processes.

2.5.2. Workpackage 5 GOVERNANCE progress towards objectives

Reaching a consensus about the conceptual framework in which the WP5 debates will take place was an essential aspect. For this reason each research team should include in its catalogue its own point of view relating to the following questions:

Which is the general framework for the relationships between sustainable development, territorial governance principles, research in Humanities and Social Sciences and territorial intelligence?

- How does research-action improve territorial governance favouring sustainable development?
- How do establish principles of well-balanced approach, participation and partnership condition research?
- How do new technologies influence these processes?

The discussion about these topics allowed giving evidence of the multidisciplinary and multidimensional character of the WP5 work. Although all the participants agreed with the general definitions about *sustainable development*, *governance* and *territorial intelligence* summarized in the CAENTI Work Document, an interesting debate about the arose research-action concept.

For practical reasons, in order to address coordinates and to establish the kind of research projects to take in the catalogues of experiences, the group decided to focus on the research-actions experiences that fulfilled both following requirements:

- The research subject should concern territorial development, local governance, sustainable development and/or, territorial intelligence.
- They should have been developed *for* or *with* territorial actors.

Due to the crucial role of the *research-action* concept for the whole CAENTI coordination action, the group agreed with the importance of getting a more precise consensual definition about this last topic in further meetings.

At the end of August 2006, the six draft versions of the experiences catalogues have been addressed to the WP5 leader. WP5 research team members belong to diverse disciplinary fields and take part in different research structures, for that reason they presented different approaches and points of view with the elaboration of their distinctive catalogues. Therefore, members did not understand and answered all the questions in the same way and it generated a remarkable heterogeneity in the answers. Notwithstanding, general guidelines

have been respected and the answers diversity constitutes a good departure point to go deeper on debates which should necessarily take place in later stages.

In the following section we describe some of the points on which the discussions have been focused until now.

2.5.2.1. Research-action concept

The decentralizing policies of the latest decades implied a stronger importance of the regional and the local actors in the definition of the territorial development strategic guidelines and in the projects management and evaluation which have a territorial base. The decentralized territorial entities have a stronger power than in the previous periods. Moreover, public entities try to involve the private actors as broadly and deeply as possible in the design and management of the territorial projects, by giving a more important role to the civil society in these processes.

This proliferation of decision-units on the territory reminds the territorial governance, the rules creation, the processes and practices determining the way the decisions are made on a territory.

Good governance needs a kind of knowledge about the territory generating global visions of the main problems which can affect the sustainable territorial development. Nevertheless, the scientific knowledge about the territory is a such complex knowledge as it is difficult to identify and quantify causal links among lots of potential factors. Moreover, it is an uncertain knowledge because of the scarce information, the measure errors and the undetermined results. Consequently, the knowledge about territory is usually ambiguous and different legitimate interpretations that are based on observations or evaluations of similar data are used to coexist.

In this last case, values have a special importance when we make the results interpretation. To get a knowledge that favours governance, territorial actors, and even actions recipient people, the participation is fairly necessary. Indeed, territorial actors and beneficiaries emphasize different kinds of knowledge and explicitly underline different values systems from which the scientific results can be interpreted.

On the other hand, during the performance of their own actions, the territorial actors can not generate this knowledge set which is necessary for good governance.

The problems complexity, actions sectorialization and urgencies that are linked to the actions requirements usually prevent the actors from generating global visions which are necessary to solve territorial problems and which need scientific knowledge and methods to develop.

The actors and especially those who work at the closest level of the actions recipient people, do not often have the basic tools that are usually used in the scientific field to gather, analyse and rarely share the information used to manage.

In other cases, the information is available but they do not have the theories, methods, instruments, place and time to interpret this one and convert it into useful knowledge for action.

As a consequence of the above described processes, the new challenges of the territorial governance - achieving a more effective adaptation of policies to territorial and citizens' needs and increasing civil society participation in the decision-making processes - require to strengthen the alliance between the scientific world and the territorial action.

CAENTI partners tried to reinforce this alliance in the field of territorial socio-economic development during the past fifteen years. Their research projects have been directly or indirectly linked to development projects on the 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 a scale limit, the grade of the actors' implication can be minimum, which one consists exclusively in demanding the study that will be the basis of the policies or territorial actions design. On the contrary, actors and researchers are part of the same research team and jointly perform the research in the framework of a territorial project.

From one to another side there is a great variety of situations, therefore one of the main challenges of WP5 is to delimitate the participation level from which we can deem a genuine articulation between research and action. In other words, another WP5 objective defines a research-action concept that allows operating the commitment terms between science and society in order to foster territorial governance.

The bibliographical revision performed by the participants of the WP5[14] shows that the research-action concept has been defined in a different way by authors of different disciplines. In addition to this, in the framework of each disciplinary field the concept is already evolving what indicates that, in a certain way, this concept is still under construction.

The debate within the WP5 is not ended up yet, but it reached an initial definition that makes compatible the different points of view. That is why, the research-action is that kind of inquiry which satisfies these two requirements:

- It is carried out in order to achieve simultaneous 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 can mean that, in the widest sense, the research-action is not merely a methodology or a technical specialty, but rather a way of understanding the social science (Wadsworth, 1998) and, more generally, the whole scientific activity.

It is a way of doing research which wonders about the external choices effects that scientists do during their work regarding the outlined questions, the focused problems, the used methods, the involved actors, the recommendations that are made as a consequence of results, etc. This is a focus that implies to explicitly recognize and internalize the ethical issues involved in all research processes.

From this recognition, another main WP5 challenge arises: defining which are the ethical and methodological principles that must be respected in the research-action processes, so that the results of these last ones foster territorial governance.

2.5.2.2. Governance principles of sustainable development

The CAENTI Work Document establishes that during this first year the members of the WP5 will organise a discussion about the principles of the sustainable development governance. The result of this debate should be the framework to analyze which are the ethical and methodological principles that the research-action processes have to respect in

[14] We are grateful to Mihai Pascaru of the University of Alba Iulia for the bibliographical upgrade he has carried out.

order to foster a more effective adaptation of territorial action to inhabitants needs and to boost the participation of actors involved in the decision-making processes.

The following three basic set of principles have been involved in these discussions.

Firstly, just as it was described in the DOW, the CAENTI framework regarding this point described the basic principles that the research-action processes fostering the territorial governance of sustainable development should respect such as the three ones which have been praised by the European Union regarding its programs and communitarian initiatives in the field of the economic and social development:

- Multidimensionality: focussing the research subject using a multidimensional and multisectorial well balanced approach.
- Partnership: fostering and involving territorial partnerships in the research-action processes.
- Participation: assuring that territorial actors' participation is carried out in an effective way.

The second considered set of principles consists in those enunciated by the European Union in 2001 regarding the "good governance"[15]:

- Transparency in the processes of decision-making,
- Citizenship participation,
- Well balanced assignment of responsibility and accountability,
- Coherence of the political measures and actions,
- Coordination of the involved sectors.

Thirdly, the principles relating to the policies of sustainable development enunciated in the Summit of Brussels of June, 2005[16] have been considered:

Promotion and protection of fundamental rights,

Intra and intergenerational solidarity,

Open and democratic society,

Citizenship 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.

The consideration of the second and third set of principles has allowed WP5 to add to the three original ones described in the DOW, five other basic principles that the research-action processes should respect:

[15] COMMISSION DES COMMUNAUTÉS EUROPÉENNES (2001): Gouvernance européenne. Un livre blanc. COM (2001) 428 final.
EUROPEAN COMMUNITIES COMMISSION (2001) : European governance. A white book. COM (2001) 428 final.

[16] See Conclusions de la présidence – Bruxelles, 16 et 17 juin 2005, Conseil Européen, 10255/1/05 REV 1 29, Annexe I.
See Presidency conclusions – Brussels, the 16th and 17th of June, 2005, European Council, 10255/1/05 REV 1 29, Annexe 1.

- Transformation: it is an implicit principle in the research-action concept; it consists in fostering the transformer role that research can perform about social reality.
- Sustainability: it consists in carrying out long-term research processes necessary to obtain a more scalable knowledge, in order to generate sustainable territorial development dynamics.
- Transparency: the research-action processes must lead to a higher transparency of the results regarding both knowledge and policies, facilitating and democratizing the decision-making processes.
- Co-responsibility: the component "action" and the component "research" are equally responsible for the process development.
- Co-learning: the research-action processes must facilitate the cooperative learning of all the participants, what improves the capacity of the territorial system to solve future problems and keep in mind their past experience. In other words, they ought to strengthen the territorial intelligence development.

The application of these principles, in order to be effective, should concern all the research stages: the topics selection, the employed methodology, the pursued results and the diffusion and transfer results systems. Their implementation is complex, and thus it is necessary to analyze the methods and research-action protocols which can facilitate its future development.

The WP5 work for 2007 will firstly consist in completing the list of principles and in defining them in a more precise way; secondly, the main implications of their actual performance should be addressed, including the possible adverse effects; and thirdly another important task will be the design of research-action protocols that can boost the actual application of these principles. The result of this work will be the *European quality letter of research-action favouring the territorial governance of sustainable development*.

2.5.2.3. Limits and potentialities of the research-action processes applicability

Another aspect on which the WP5 has focused is the identification of limits that the effective practical application of these principles imposes to the research processes and the potentialities that the extension of its use can foster.

Regarding the limits, they are basically concentrated on the institutional context in which the research-action processes are performed.

Considering the research side, although the necessity of the multidisciplinary approaches development carried out within a partnership is usually acknowledged, neither the systems of research funding, nor the means of scientific diffusion and the structure of academic merits boost this sort of project, especially in the field of social sciences. On the other hand, participatory methods are, in some cases, unjustifiably considered as suspicious and accused of lacking objectivity.

From the action point of view, there are also several factors limiting the applicability and extension of the research-action practices: the urgency of the territorial necessities which does not allow using time and resources for research, the imposed "management by projects" system which brings as consequence the public policies and actions fragmentation, the variability of actors involved in territorial actions, the capacity of the territorial actors to appropriate and internalize research methods and tools incorporating them to their daily management and, of course, the actors will to generate genuine participatory processes on the long run.

Regarding potentialities, all the WP5 participants have pointed out the absence of systematic evaluations that prevents the impact of the research-action projects on territorial governance from being evaluated in a precise way. However, the analysis of the research-action projects results which has been 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 sort 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. In particular, participatory methods enhance the social capital because they increase transparency and generate confidence between the actors.

Another meaningful expected effect of this kind of research-action processes is the actors' appropriation of scientific methods and tools for analyzing, managing, and evaluating territorial projects, which have been adapted in each case to their own specifics needs. All this can extend an evaluation culture allowing actors a more systematic learning from their experiences. The final consequence of all this effects is actors' empowerment so as the increase of their endeavour capacity.

The benefits for the research are also obvious. This kind of processes provides more pertinent information and it allows 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 advances can be followed by important setbacks having strong adverse effects (institutional confidence failures, for example). This is the reason why it is so important to analyse these processes and study deeply the possible ethical and methodological rules leading to better results.

An unfinished subject of WP5 is the analysis of the potentialities and the limits that information and communication technologies use can provide to these processes.

2.5.3. Workpackage 5 GOVERNANCE deviations from the project workprogramme

The WP5 followed its workprogramme during the first period. Two internal reports were drafted but they were not editable. Nevertheless, the draft provided the useful information for the global report. So we postponed their edition, because the concerned researchers have presently heavy academic charges or missions.

2.5.4. List of workpackage 5 GOVERNANCE deliverables

Del. n°	Deliverable name	WP n°	Date due	Delivery date	Estim. P/M	Used P/M	Lead contrac-tor
34	Report on research context and practice UFC.	5	10	10	2,5	3,5	UFC
35	Report on research context and practice UHU.	5	10	10	2,5	3,5	UHU
36	Report on research context and practice ULG	5	10	10	2,5	1	ULG
37	Report on research context and practice PTE.	5	10	Potsponed 18	2,5	2	PTE
38	Report on research context and practice UAB.	5	10	Potsponed 18	2,5	2	UAB
39	Report on research context and practice UNISA.	5	10	10	2,5	2	UNISA
40	Publication of report: "Application of the sustainable development governance principles to the territorial research-action".	5	10	10	5	7,7	UHU
					20	21,7	

2.5.5. List of workpackage 5 GOVERNANCE next milestones

Del. No	Deliverable name	WP n°	Lead participant	Estimated person months	Nature	Dissemination level	Delivery date
41	Report on evaluation conclusions UFC.	5	UFC	1,5	R	CO	22
42	Report on evaluation conclusions UHU.	5	UHU	1,5	R	CO	22
43	Report on evaluation conclusions ULG	5	ULG	1,5	R	CO	22
44	Report on evaluation conclusions PTE.	5	PTE	1,5	R	CO	22
45	Report on evaluation conclusions UAB.	5	UAB	1,5	R	CO	22
46	Report on evaluation conclusions UNISA.	5	UNISA	1,5	R	CO	22
47	Letter of quality. Research evaluation for territorial intelligence.	5	UHU	7,5	R	PU	22
48	Catalogue of participation research-action methodologies, especially those suitable for territorial intelligence development.	5	UHU	3	R	PU	28
49	Catalogue of technological tools for territorial intelligence development.	5	UHU	3	R	PU	28
40	Video: “Research is at territories intelligence service”.	5	UHU	6	D	PU	31

2.5.6. Prospects of workpackage 5 GOVERNANCE for next period

In 2007, a letter of quality will be jointly elaborated with the whole CAENTI participants. It will establish the main ethical and methodological recommendations for research-action likely to guarantee the respect of the principles of sustainable development governance.

The methodology and work groups will be formed according to the preconizations of the final report. This task will be tackled in a meeting scheduled in Liége on January, the 19th and 20th 2007.

In 2008 the reflection will be focused on technologies favouring these developments. The reflection must contribute to enhance a more general approach to "research-action" concept, methodologies and practices.

2.6. Work package 6 WP6 [TOOLS FOR 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 level 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 are made during the first project period, the progress toward objectives.

- The deviation from the project

- The list of deliverables

- The list of milestones

- The prospects

2.6.1. Workpackage 6 TOOLS objectives, work starting point and organisation.

We will present the WP6 objectives, its starting point and its organization in three separate parts.

2.6.1.1. Objectives

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, valuate and transfer participative projects in 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 is used for several years by most of the CAENTI participants in multi-sector observatories. The latter use similar tools but collect and process different information contents. The WP6 aims at harmonizing the CATALYSE tools and facilitating their access on Internet.

CAENTI considers CATALYSE as a reference, but not as a pattern. The WP6 pays interest to all the tools that are 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” valuates 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 will 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 that are useful for the end actors.

Since the repertory is an online tool, the online IIAF in 2007, and the online EITI in 2008 will allow having all the CATALYSE tools in online version at the end of 2008. However, it also implies different functionalities and new tools, as modules of a global online information system. Beyond the CATALYSE method, the WP6 also aims at identifying and valuating complementary tools of territorial intelligence or new ones.

Studying the feasibility of a **European Observatory of the Elementary School**, EOES, is another WP6 coordination activity. The objectives of this coordination activity are to study the transferability to the other European countries of the method that is experimented in France by the observatory of rural school: 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. It will imply to valuate 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. The Observatory of Rural School uses CATALYSE method and tools.

2.6.1.2. Work starting point

CATALYSE is only a starting point for experienced actors and researchers. WP6 reestablished the method presentation o in order to better explain the articulation of professional tools, methods and governance.

CATALYSE offers to the territorial actors a method and tools to make an inhabitants' needs diagnosis and to evaluate actions that are led to satisfy these needs. Mainly intended for multi-sector development partnership, it is a territorial intelligence method, which uses information technologies and aims at developing, in a sustainable development logic, a global approach, partnership and participation.

Initially designed in the framework of the Model Action "MOSAÏQUE" of the "Third European Programme of Fight against Poverty", CATALYSE method has diffused in Europe since 1994 through territorial diagnosis, evaluations and observatories. These projects were led on the initiative of "development partnerships" generally within European projects, with local universities participation or support.

CATALYSE offers three tools that confront three kinds of information:

1. A multi-sector guide of **diagnosis and evaluation** to gather individual information about people's needs, so as to define and measure **needs** profiles.

2. A **services repertory** to list the existing services on the territory that are open to satisfy the people's and the community groups' needs

3. A **territorial information system** (TIS) that integrates socio-economic **territorial indicators** that are provided by specialized statistic institutions.

Measuring and defining needs and services profiles, then globally and territorially confronting them allow:

- designing services that can satisfy the needs;

- valuating the organizations and actions providing these services at the individual and territorial levels.

The free and friendly software PRAGMA, ANACONDA, NUAGE and SITRA are used for quantitative, qualitative and spatial data analysis so as to measure and compare the importance and localization of needs and services, as well as the main profiles of the territorial community.

The CATALYSE diagnoses, evaluations or observations, are generally initiated by an actors' multi-sector development partnership, to better know the individual and collective needs and to act together in a more efficient way. According to the terminology of the Equal program of the European Social Fund, “development partnership” refers to a multi-sector consortium of territorial actors. They are private, public and associative organizations, professional or voluntaries bodies, which make actions that offer to the inhabitants, services that contribute to their territory sustainable development. The multi-sector approach implies economics, social, environment, culture, etc. It introduces an important diversity of actors at the local level. This diversity is complicated at the European scale, where the corresponding policies often have very different histories.

The partnerships that apply the CATALYSE method are often called “observatories”. They implement the same tools of data analysis, but with different information contents, data analysis protocols and uses.

However, we can define some common mechanisms in CATALYSE observatories. An operational actors group selects the guide questions. Then, it coherently defines the repertory information and the territorial indicators. A technical and communication team processes and animates the data analysis. The operational group ranks the needs profiles. *Ad hoc* workshops deepen the needs analysis and valuate services, so as to make joint projects of new or reestablished services emerging. Project teams elaborate projects.

The **diagnosis and evaluation guide** gathers the individualized information according to a global and multi-sector approach. This guide is structured into themes. Each of theme includes several questions. To facilitate the guide exploitation, each question is written as an open question that allow choosing between several modalities. The data collection is made by several persons groups, in the organizations or actions members of the partnership. PRAGMA is used to digitalize the data, then to join the distributed files in a global database for data processing. PRAGMA is used to make the quantitative treatments and all the coding that data processing need. It particularly prepares the qualitative data analysis, mainly a typology of needs profiles, that ANACONDA makes. NUAGE represents the results of ANACONDA thanks to a 3D animation.

The **services repertory** counts the existing services on the territory thanks to an online form which contents are structured, like the guide, into themes, questions and modalities. The similarity of the guide questions and of the form descriptors allows comparing needs and services. This confrontation between demand and supply aims at valuating the relevance of the available services and at identifying the missing ones, so as to adapt the services supply to satisfy the expressed needs. PRAGMA, ANACONDA and NUAGE software are also used at this level to analyse the services and contextual indicators sets.

The **territorial information system** (TIS) allows integrating **territorial indicators** and socio-economic information with a statistic nature provided by specialized institutions. They concern the territorial and community context,. The TIS draws maps about people’ needs, services and territorial possibilities from the guide data, or the repertory. The TIS also allow confronting the needs territorial location with the services location and, possibly, with the territorial information, so as to locate the services in an optimal way.

Some of the CAENTI members have fifteen-year common experience of the development, the experimentation and the use of the CATALYSE method and tools in various territorial contexts in Europe. Most of the CAENTI consortium actors use the CATALYSE method, with the support of universities, which provided them their territory knowledge and their methodological skills.

For several years, the CATALYSE observatories have had the project to compare their indicators and the data processing they operated. They also planned to digest a CATALYSE Toolkit for new users. This project aimed at doing a cross-synthesis of the indicators and at improving the tools accessibility. This idea runs up against the territories diversity, actor's practices and policies. Each local partnership used its own indicators within the framework of the CATALYSE method, according to its objectives, its representations, its practices, its institutional environment and its regional context. However, the underprivileged populations live situations which global dynamics are often close, even if they are locally expressed with a strong diversity. So the suggested kit aims at:

- offering contents which interest was evaluated by a majority of users;

- defining data analysis protocols of these indicators;

- simplifying and implementing the analysis tools that instrument these protocols

- documenting at the same time the indicators and the tools.

From a synthesis of their experiments, they started defining together the specifications of a “CATALYSE toolkit”.

At the contents level, the synthesis concerned the indicators that are used by most of the actors. It was possible to bring closer many indicators and to homogenize their formulation by focusing on the latest European standards, so as to suggest a European selection that could be used at the local scale. Thus, it allows making comparisons between territories in relation with the European indicators. Each local partnership did not use all the indicators suggested by the European guide. The specific indicators were generally rejected, except when their interest was recognized by most of the other partners.

The contents and tools harmonization took into account the need for confronting the guide data (needs, project) with those of the repertory (services) and with the territorial indicators.

The tools harmonization is based on the contents selection. It must take into account the maintenance, which is linked to the constant evolution of the data-processing technologies and the concern of improving their accessibility by automating the treatment procedures as much as possible. The advantage of operating an indicators selection is to be able to specify their data processing protocol and their editing procedure.

The “CATALYSE Toolkit” will be addressed to the actors who want to carry out together a multi-sector diagnosis of their publics’ needs, then to valuate the relevance, the efficiency and the impact of the actions they implement to satisfy these needs. Its objective is to present an indicators selection within which these actors will be able to operate their own selection.

The interest of each of the suggested contents, protocols and use consists in the following points:

- It is of general use in a multi-sector approach;

- It was defined in a concern of European harmonization;

- It is coherent with the European standards when there are some;

- Its treatment protocol will be described step by step;

- The tools allowing making these treatments will be freely available and easy to use.

It will still be possible for actors without any particular experience to carry out a diagnosis and an evaluation, by using the suggested contents and tools, but the proposal will not be closed, it will remain evolutionary.

2.6.1.3. Organization

As mentioned before, the initial WP6 programming included three annual stages for the full duration of the project:

1. Harmonizing CATALYSE tools at the European level in the "CATALYSE Toolkit", in 2006

2. Defining the specifications of an online "Inclusion Itinerary Accompaniment File" IIAF, in 2007.

3. Designing a specialized portal on European Institutional Territorial Indicators, EITI, that is useful for actors, in 2008.

As territorial intelligence tools are both contents of information and data processing tools, three kind of tasks can be distinguished at every stage: contents selection, technical specifications and guidance notes about the join 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 for a European observatory project.

The WP6 planning presented in the "First periodic management and financial report" illustrates the WP6 global organization of the tasks, with deliverables and milestones.

According to this planning, the WP6 was composed by eight research coordination groups:

WP6C [Contents, led by Celia SANCHEZ LOPEZ, UHU] - Definition of the Catalyse toolkit contents at the European level. This coordination group is in charge of drafting the specifications (themes and questions) with the expiry of June for a European guide of diagnosis and evaluation, by harmonizing the guides that are used by the different CAENTI actors, between them and with the available European standards. Then, they will deepen the guide contents meaning - themes, questions and their modalities - whilst taking into account the different national contexts. The WP6C mainly include actors and academics who are experienced in the use of CATALYSE. It started with the definition of the specifications concerning the contents of the European Guide of Diagnosis and Evaluation. It first selected the questions and modalities of the guide, then defined the information of the services repertory and chose territorial indicators. It had to gather contents among the different CAENTI observatories, to compare them, to select questions, to harmonize their formulation and to define the selected contents from a European point of view.

WP6P [Programming, led by Cyril MASSELOT, UFC] – Technical specifications of CATALYSE tools. This coordination group is in charge of the adaptation of the processing tools PRAGMA, ANACONDA and NUAGE, as well as the 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 who are 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 that are expressed by the users. Conceptual and methodological specifications are useful to adapt the information form to the data analysis and processing conditions. They also draw the framework to define technical specifications that describe and arrange the tasks that are made by the tools. Then, they draw 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 ASENCIO COTO, UHU] - Design of guidance notes for the use of Catalyse tools. It was composed of actors and academics experienced in the use of CATALYSE tools. It aimed at defining the meanings of the contents, the data analysis protocols and the use of the CATALYSE tools in 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 understanding of the contents and the use of the data analysis tools.

WP6F [IIAF Contents, Maria Jose ASENCIO COTO, UHU] - Definition of the contents of the Inclusion Itinerary Accompaniment File (IIAF).

WP6D [IIAF Development, Cyril MASSELOT, UFC] - Specifications for the processing and editorial chain from data to results.

WP6I [Portal Indicators, Guénaël DEVILLET, ULG] - Selection of institutional online indicators at the European level.

WP6S [Portal Indicators, Cyril MASSELOT, UFC] - Specifications for an Internet Territorial Information System to spread these indicators.

WP6E [OES, Yves ALPE, UNISA] - Comparative study of feasibility of a European Observatory of School. Only a coordination group will lead this study for a three-year duration.

In 2006, the researchers who were involved in the WP6C, WP6P and WP6G coordination groups were:

WP6C [Contents] - Specifications of the contents of a European CATALYSE Toolkit

Celia SÁNCHEZ LÓPEZ, UHU, *Leader*

Guénaël DEVILLET, ULG

Julien CHARLIER, ULG

Csilla FILO, PTE

Pilar CARLES BARRIOPEDRO, ACCEM

Isabelle STIEVENART, OPTIMA

Emmanuelle BRUNETTI, OPTIMA

Caroline PASTORELLO, INTEGRA

Jean-Pierre GIMBERT, ADAPEI

Jean-Guy HENCKEL, COCAGNE

Concepción MARTINEZ MARTINEZ, VALDOCCO

WP6P [Programming] - Specifications of the CATALYSE tools

Cyril MASSELOT, UFC, *Leader*

Jérome RENARD, UFC

Antonio MORENO MORENO, UHU

Ioan ILEANA, UAB

Fang-Yie LEU, THU

WP6G [Guidance] - Design of the guidance notes for the use of the CATALYSE tools.

María José ASENSIO COTO, UHU, *Leader*

Jean-Jacques GIRARDOT, UFC

Cyril MASSELOT, UFC

Anne GRIFFOND-BOITIER, UFC

Celia SÁNCHEZ LÓPEZ, UHU

Mihai PASCARU-PAG, UAB

Coralia HANDREA, UAB

Francisco Javier MAHIA CORDERO, ACCEM

Braulio CARLES BARRIOPEDRO, ACCEM

Oscar HERNANDO SANZ, ACCEM

Marisa MARTINEZ GONZALEZ, ACCEM

Raquel PALACIO TORRE, ACCEM

Jean-Marie DELVOYE, OPTIMA

Concetta CUSUMANO, OPTIMA

Christiane MARECHAL-RULOT, INTEGRA

Jean-Pierre GABRIEL, INTEGRA

Anne PERETZ, ADAPEI

Jean Marc RIGOLI, COCAGNE

Concepción MARTINEZ MARTINEZ, VALDOCCO

Gabor PÓLA, BARANYA

Zoltan KÁDÁR, BARANYA

For proximity and linguistic reasons, the wp6c and Wp6g research coordination groups worked with a previous step of regional coordination, from the end users to the workpackage coordination *via* the coordination groups leaders:

- The University of HUELVA, The observatory of employment OLE, the Foundation VALDOCCO and the association ACCEM to harmonize the Spanish tools. In this group, ACCEM, which has growing network from three to six observatories, constituted the very first step.

- The observatories OPTIMA and INTEGRA jointly worked in the “Walloon” group with the University of LIEGE, in Belgium.

- The Association ADAPEI, the Réseau des Jardins de COCAGNE, and the University of Franche-Comté, with the contribution of the EQUAL MEDIACTION project, constituted a French group.

Proximity intermediate coordination allowed restricting to two the number of general meetings so as to adjust the work plan;

- a scientific coordination meeting in DURBUY on June 29th

- workshops within the International Conference of Territorial Intelligence in ALBA IULIA on September 22nd 2006.

Linguistic aspects were very important to associate the partners of CAENTI participants in the local partnerships of the observatories. End users of CATALYSE generally does not understand English.

Another important aspect of the WP6 organization was the tasks linking. The coordination activities concerned the three basic tools of the CATALYSE method: the of diagnosis and evaluation guide, the services repertory and the Territorial Information System.

For each of these tools, specifications and guidance notes concern:

- The contents, that are the questions and modalities of the guide, the information that describe services in the repertory and the territorial indicators.

- The data analysis protocols of these data;

- The tools which instrument the data processing, according to the protocols.

Analysis protocols depend on contents. The data analysis instruments are conditional on both contents. They will control the data gathering and they will work out the data analysis protocols.

The contents and the data analysis protocols are different from an observatory to another one. We need to gather the different contents and protocols that are used by observatories, then to compare them, before doing a synthesis. Differences between data analysis tools are less important.

The guide is the initial and determinant tool of the CATALYSE method because the actors begin to define its contents, before coherently defining the repertory information o and the territorial indicators. Consequently, the first task is the selection of the guide contents. Then, it is possible to make the definition of the repertory contents and the selection of the territorial indicators, the description of the data analysis protocols of the guide data, and the design of the analysis tools.

The definition of all the data analysis protocols can begin when the repertory contents and the territorial indicators, on the one hand, and the data analysis protocols of the guide, on the other hand, are given. Then, it is possible to finalize the tools and to document the guidelines of the whole.

2.6.2. Workpackage 6 TOOLS progress towards objectives

In 2006, the WP6 defined specifications and guidance notes of a CATALYSE Toolkit from CAENTI observatories experiences. It did not aim at doing a turn-key product but at synthesizing experiences in a touchstone.

These specifications and guidance notes are:

- The contents specifications about the information that are collected and analyzed with the tools;

- The conceptual and methodological specifications that are useful for the researchers and the engineers who design the tools;

- The technical data processing specifications for the engineers and techies who implement the tools;

- The guidelines for the end users. They concern the understanding of contents and tools uses.

The word "tools" assigns the used documents to collect the information, as the data processing software.

The WP6C defined contents specifications, mainly of the diagnosis and evaluation guide.

- It compared the diagnosis and evaluation guide that are used by the CAENTI participants to present a European guide in conformity with the existing European standards (deliverable 51, "European contents specification for a CATALYSE guide for diagnosis and evaluation", and updating in the deliverable 56, "Guidance notes for the use of CATALYSE information and tools")

- It detailed the guide questions and modalities meaning (in deliverable 56).

- It suggests an online services repertory, with corresponding information (deliverable 52 "Specifications of an online territorial repertory of services (contents and technical development)").

- It began the selection of territorial indicators from socio-economic European indicators. It needs to achieve this selection with European, national and possibly regional indicators that are available at the local level (deliverable 53, "List of territorial indicators available on internet for comparison with CATALYSE Data").

WP6P progressed much with tools:

- It wrote conceptual, methodological and technical specifications for PRAGMA (deliverable 54, "Specifications for the software PRAGMA of quantitative collection and treatment software"). 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, "Conceptual and methodological specifications for a Community Territorial Information System, including technical specifications for the integration of PRAGMA with the software of qualitative data analysis ANACONDA and NUAGE"). 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).

The WP6G also compares the practices and uses of the CAENTI observatories jointly concerning contents and tools, in order to plan joint recommendations.

- It defined the data analysis and data processing protocols for the European guide (in deliverable 56).

- It compared five observatories and three observation mechanisms, so as to draw recommendations to use the CATALYSE method in a development partnership that respects sustainable development (in deliverable 56).

2.6.2.1. Progress on contents specifications

The WPC coordination group began on March 2006 the indicators selection then the questions formulation and the methods. The comparative research was animated by Celia SANCHEZ LOPEZ on the cooperative workspace COOSPACE in the doctoral practice framework in the Institute of Humanities and Social sciences (MSH) of the University of Franche-Comté. She animated the diagnosis guides comparison and evaluation CATALYSE used by the observatories participating in consortium CAENTI and experienced in individual diagnoses, in various territories from Europe. Other actors were associated to the evaluation of the results. She harmonized the selected indicators by comparing them with the national devices and the European standards.

This work was previously carried out during regional coordination meetings between the University of Franche-Comté on the one hand, and one the followings participants, on the other one.

- The University of HUELVA, OLE (Observatorio Local de Empleo, local observatory of employment), the association ACCEM and the foundation VALDOCCO to harmonize the Spanish guides.

- The observatories OPTIMA and INTEGRA with the University of LIEGE to harmonize the “Walloon” guides.

- The association ADAPEI in France with the help of COCAGNE and the contribution of the EQUAL “MEDIACTION” project.

At the formulation level, Celia SANCHEZ LOPEZ provided an important work of harmonization with the European standards starting from an official European statistical servers study.

A first Spanish digest, called “migrants” guide, was proposed by ACCEM on April 2006 from the guides of the migration observatories Odina (GIGON) and Opasi (SIGÜENZA, GUADALAJARA), with the participation of new observatories in LEON and SEVILLA. It preceded the European guide and allowed a first experimentation in six Spanish observatories of migrations, three experienced ones and three new ones.

Then OPTIMA, INTEGRA and the University of LIEGE proposed in May 2006 a synthetic "Walloon" guide.

From these proposals, a first European guide, joining too the guides used by VALDOCCO (Spain) and ADAPEI (France) observatories, was proposed as "work piece to be broken" at the beginning of June 2006. It was published in three languages: English, French and Spanish, with basic meaning definitions, on the cooperative workspace of the WP6C coordination group to be debated before the research coordination meeting of DURBUY (Belgium).

The European Guide was largely debated in coordination meetings, as the meanings definition of its contents, and evolved much thanks to the exchanges we had on COOSPACE.

A first version was explained in the coordination meeting of DURBUY.

A new proposal of European guide was presented with basic definitions in the deliverable 51 at the end of August 2006.

A new actualized version of the European guide is proposed in deliverable 56. It was strongly inspired by the experimentation first results of the guide "CATALYSE Migrant" within the ACCEM observatories, in particular of technical exploitation constraints. The indicators selection did not evolve much, but the questions formulation was improved.

The guide contents definition made it possible to begin since May 2006 the coordination of three series of research activities, strengthened by WP6 coordination meetings and maintained on COOSPACE.

- The more detailed definition of the information meaning included in the guide, the repertory specifications and the contextual indicators, in coherence with the guide information, so as to allow their confrontations; it was done with the WP6G (deliverable 56).

- Specifications that concern the technical design of the data analysis tools, by WP6P.

- The comparing of the practices concerning, on the one hand, the statistical and spatial treatments in order to draw up a synthetic data processing protocol for the guide and the other information, on the other hand, the tools implementation in the framework of a development partnership, by WP6G.

WP6C and WPCP specified together the information of the services repertory (deliverable 52) 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 such local comparison using the guide data and European level indicators (deliverable 53).

2.6.2.2. Scientific coordination meeting of DURBUY, on June 29th 2006

The scientific coordination meeting of DURBUY, on June 29th 2006, met for the first time all the members of WP6, that represent about 25 people.

Celia SANCHEZ LOPEZ introduced a first version of the European guide for debate.

Cyril MASSELOT presented a first proposal of services repertory prototype.

Jean-Jacques GIRARDOT proposed principles for the choice of the contextual indicators. A link was established with the WP4I group which coordinates research activities on territorial information. It is animated by the University of LIEGE. The day after, the meeting of WP4I established the principle to work jointly on the choice of twenty indicators to compare to important questions of the guide.

The meeting of DURBUY also started the drafting of the CATALYSE guidance notes. Celia SANCHEZ LOPEZ presented a communication about the contents definition that will be followed on a specific forum in COOSPACE.

WP6 started following up the experimentation of "migrants" guide ACCEM.

Jean-Jacques GIRARDOT and Maria Jose ASENSIO COTO introduced the aspects that are linked to the CATALYSE participative uses within a partnership. WP6G agreed on the fact each territorial actor will draft a tools use history and recommendations.

2.6.2.3. WP6 Workshop in the International Conference of Territorial Intelligence in ALBA IULIA (September 22nd 2006)

A specific workshop was dedicated to WP6 in the International Conference of Territorial Intelligence in ALBA IULIA on September 22nd 2006.

Jean-Jacques GIRARDOT introduced a communication on "Activities and prospects of research activities concerning tools of territorial intelligence for sustainable development actors. Work Package 6 Tools for Actors of CAENTI" [GIRARDOT 2006]

Celia SANCHEZ presented the European GUIDE specifications with definitions of meanings "Specifications of the contents of the European Guide of Diagnosis and Evaluation." [SANCHEZ 2006]

Cyril MASSELOT and Maria Jose ASENSION COTO made the point on the activities of the coordination groups WP6P and WP6G respectively.

ACCEM outlined in the workshops for papers "ACCEM observation strategy" [FERNANDEZ 2006].

Jean-Jacques GIRARDOT (UFC), Franscisco Javier MAHIA CORDERO (ACCEM), Mihai PASCARU (UAB), Anne PERETZ (ADAPEI) , Ruey-Ming TSAY and Fang-Yie LEU (THU) presented papers linked with the research activities of WP6.

The WP6 workshop allowed a general discussion, with all CAENTI participants and other conferences researchers of the research activities and of the prospects. Separate meeting of coordination groups planned out further activities. It was mainly decided to join the coordination groups WP6C and WP6G in WP6G to work together at :

- 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.

2.6.2.4. Progress on data processing tools specifications

The WP6P coordination group started working on March 2006 on the adaptation and the integration of the processing tools PRAGMA, ANACONDA in order to use them in a way

that will be conform to the guide specifications. Other objectives were improving their accessibility as microcomputer tools, and then as online tools.

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.

The CATALYSE « Migrants » guide was also a reference for the specifications definition for PRAGMA so as to develop two joined multilingual versions, using free software :

- An online version in PHP/MySQL, epragma, of which a prototype, also limited to the key-in, was coding to implement a first tests series with ACCEM.

- Of a multiplatform version that works on all the systems.

The difficulty was to define specifications of a common database, or at least of bases that can easily communicate, as a computer and an electronic planner. Indeed, in many partnerships, the physical conditions of access to Internet are unequal in space and time. Consequently, it is interesting to be able to jointly use several solutions, provided that the data bases synchronization is transparent for users.

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 CTIS, 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 (deliverable n°52).

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 yet started a research action on a CATALYSE observatory website by using a content manager system and including the repertory as the first Internet service. It's a less ambitious system than the TICS, but it can be a first step to give usual Internet tools, as simple as a blog, to observatories.

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).

2.6.2.5. Progress on guidance notes about CATALYSE uses

In parallel to the gathering of the contents that is carried out by the WP6C group, the WP6G group gathered the uses of the CATALYSE observatories Odina (ACCEM), Opasi(ACCEM), OPTIMA, INTEGRA, ADAPEI and VALDOCCO, which are the most experienced observatories with individual diagnoses, so as to:

1. Precise the data analysis and data processing protocols for the European guide.

2. Compare experiences in implementing the CATALYSE method in development partnerships and the uses of the CATALYSE tools, contents and data analysis instruments.

The WP6G research coordination group began gathering the **data analysis protocols** of these observatories because data analysis protocols, as meanings definition, are directly linked to the information selection.

The protocols harmonization faced more difficulties than the data selection and the meanings definition.

- The protocols notion was clearer for academics than for actors

- Even if the observatories globally executed the same operations, they neither followed the same general steps nor precise steps for each question.

- The same observatory did not use the same protocol in a diagnostic and in the next one. Techies often changed and, even with the same persons, they do not really have a memory of the data processing steps from one time to another.

- The different observatories used different guides, with different questions.

These difficulties were increased by the link between questions selection and protocols. Some questions cannot be selected before knowing their recoding. They are questions that can not be accurately formulated in the same way in every territory, but they can be harmonized at the European level after a recoding. For instance, the types of income are not the same, in number and in formulation, in all the European countries. It is not always possible to find a generic terminology. But all the different lists of incomes can be regrouped in the same categories of incomes for all Europe. For a good comprehension and communication, it is better to present a complete list with the exact local formulations (in the local language) of types of incomes as question modalities. Generally, such lists with more than twenty modalities and with big and marginal ones, cannot be directly statistically treated. They have to be recoded in some categories, according to the European standards. Consequently, even if we cannot harmonize the question at the data collection level, it can have a comparable or a same form at the data analysis level. If such recoding is possible, such questions can be selected.

Theses difficulties were partially resolved during DURBUY meeting with the proposal of a European guide, which can be used as a reference. Among the different guides, the data protocols of the European guide questions are the most interesting. It is a priority because the Inclusion Individual Accompaniment File will include more questions than the guide, so the topics or questions that are not interesting for the guide in 2006, will be able to be interesting in the IIAF, in 2007.

The comparative research activity about protocols help to define methodological rules and protocols general steps: quality control, coding of open questions, recoding of closed questions and characters selection. They were used to define specifications for PRAGMA and helped to criticize its defaults as regards these functions, particularly the impossibility to memorize the steps at the global level and at the question level (deliverable n°54).

In the DURBUY meeting, the WP6G decided to only refer to the latest diagnosis of each observatory. As a consequence, the rules were clearer: referring to the proposal of a European guide, what were the data analysis protocols you used for the similar question in the latest diagnosis you made?

This clarification does not solve every thing. If the protocols description progressed, the comparative research on protocols helped more to make the guide evolve, than to define the meanings of the questions and the technical specifications of the data processing tools.

In the workshop of the Conference of ALBA, the WP6G group established a frame structure to be completed by each observatory, according to the general data analysis protocol which is mentioned above. This framework allowed quickly establishing a synthetic table, after a stable version of the European guide was validated in the same workshop. The WP6G coordination group detailed the main data analysis protocols for all the European guide questions (deliverable n°56). They particularly established:

- All the elements we need to define the technical specifications of the collecting tools

- The basic elements to code and recode, as codes

- Elements concerning the relevance of each question that details its interest in the data analysis

- Guidance notes about the technical aspects of data analysis.

This work will be pursued in 2007 with the data processing of the experimental diagnoses of ACCEM observatories. It will be more efficient to work with the "migrants" guides as it is closer to the European guide than the specific guides of observatories designed with different objectives.

Afterwards, the WP6G will define:

- the protocols for repertory information that do not correspond to the guide questions

- the protocols that are used to confront the guide questions with the repertory information

- the protocols that are used to confront the guide questions with the territorial indicators (once the selection of the later is done).

About the **uses of the CATALYSE Toolkit**, the WP6G group compared five observatories and three observation mechanisms, so as to draw recommendation to use the CATALYSE method in a development partnership whilst respecting sustainable development.

The CATALYSE territorial intelligence tools do their best to respect the principles of sustainable development as a development that "*meets the needs of the present generation without compromising the ability of future generations to meet their needs*" (BRUNDTLAND, 1987). The knowledge of the people's needs prevails in the CATALYSE diagnosis. We compare them with the supplied services so as to satisfy them, as well as with the territorial indicators: it is a fundamental aspect of the evaluation.

The CATALYSE method uses do not only concern the technical use of the data processing tool, but also the f the contents and the method understanding. It is not so usual in the public sector, and even in the associative one, to clearly start from the needs rather than from the actors' skills and to evaluate the services efficiency and the relevance.

The uses also concern the organization of the CATALYSE method and tools implementation in partnerships, i.e. in a non-hierarchical organization. How to design and define multi-sector tools? How to create a common language between sectors and actors?

How to distribute the data collection and to manage the data gathering? How to animate the data analysis in a participative way? How to inform partners and inhabitants? What is the observation impact on the partnership and on the community? All these questions, and other ones, are interested in the CATALYSE method uses.

As a consequence, the uses issue is a far-reaching comparative research activity. In this field, everybody thinks he has special problems to solve, with different mechanisms in a very specific territory. In such context, a multi-sector partnership is difficult to build and maintain. But, if it is true each person has individual problems, it is also true that people have the same global problems, even if it is in a specific way and/or in a specific local context. That is why we have to "globally think and locally act". So, this topic concerns the common uses, the general advantages and the difficulties that everyone, and especially new users, can come across during the CATALYSE implementation and use in a multi-sector local partnership, in order to inscribe its actions in a sustainable development logic.

The WP6G tried to start from the experiences of the partnership observatories that use the CATALYSE method, to specify recommendations for the CATALYSE new users. Every one was aware that uses are a crucial issue. These coordination also use the regional steps, especially in the Walloon region with OPTIMA, INTEGRA and the University of LIEGE, in Spain with the ACCEM observatories and in France with ADAPEI.

It was difficult to quickly extract general recommendations from very specific experiences. But the exchanges were very useful, because each observatory needed to know more about the other experiences, before being able to release the common aspects and the specific evolutions. That is why, in DURBUY, the WP6G group decided that each observatory will draft a short history to present its experience.

Before the Conference of ALBA IULIA, Maria Jose ASENSIO COTO made a research practice in the House of Humanities and Social Sciences (MSH), so as we can make a global fix on the modeling of the CATALYSE experiences. The WP6 suggested a first governance pattern for the development partnership that use the CATALYSE method and it began to list the CATALYSE experiences in Europe, with the information coming from the observatories (deliverable n°56). Maria Jose ASENSIO COTO designed a comparative sheet about data protocols. But it was not possible to harmonize the histories without loosing their main interest: being drafted by the actors.

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 once the guide is defined. Besides, it avoids having any dispersion at the cooperative work spaces level. The WP6G presented a pattern sheet for the data processing and it was validated. The WP6G decided to distinguish two aspects of each of the histories: the observatory presentation, and its observation mechanism.

So, the WP6G coordination group presented in the deliverable 56:

- First recommendations about the information source.

- The examples of five observatories.

- The experiences of three observation mechanisms.

OPTIMA and INTEGRA began a joint comparative history to establish a first recommendations list, as a "work piece to be broken". This first series of advice aims at preparing a common debate and the validation of recommendations for new users.

2.6.2.6. The European Observatory of the Elementary school

The WP6E coordination group started working on the specific objectives of their operation that was re-called : Toward a European Observatory of the Elementary school, feasibility study from the French experience "Observatory of the Rural school".

Since 1999, the Observatory of rural school has studied a 2400-student troop that has gone 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 data base constitution results from surveys that were diffused to the students, their parents, their teachers and on information that were got from the official examinations services. CATALYSE methods and tools are used to process, but also to promote a participative approach. The information gathering work mobilizes ground actors who are the teachers. They are also solicited to interpret the results of the statistic data processing.

A coordination research meeting took place on July the 4th, 2006 in AIX-EN-PROVENCE (France) to exchange about the WP6 issues. Yves ALPE, group leader, presented the WP6E group framing, management proposals and programming. Natale AMMATURO introduced a debate about operating of the joint research team "School and Territories" in Università di SALERNO. The meeting ended with a debate about the WP6E objectives and questionings.

The WP6E fundamental questionings are linked to the relation between the students' life territory and school territory and the school success. It is obvious, beyond the students' socio-cultural belonging , their school success depends on their life projects and on the more or less precise representation they have of their professional future. However, this construction depends on multiple territorial factors: wealth of the local economic network, diversity of the training supply, territorial actors' involvement on the school issues. Consequently, equal opportunities are very different from a territory to another one, for the children who belong to a same socio-professional category. It is interesting to notice that rural environments are not underprivileged in comparison with urban ones, as far as the school success in the elementary school is concerned.

Another questioning concerns the fact school does not operate in a closed environment; and many school structures implement opening devices on their economic, social and cultural environment, which impact should be measured. The latest PISA inquiry shown that success is more important in the European countries where the links are stronger between school, families and territorial authorities . It is also very interesting to measure the paper that school can have in the local development: it is often asserted, but rarely studied in a detailed way.

In the International Conference of Territorial Intelligence in ALBA IULIA, the debate about the WP6E suggested a WP6E provisional programme for the duration of the CAENTI project:

- May 2007: Drafting of the pre-project;
- October 2007: State-of-the-art;
- About April 2008 : Specifications on tools and methods;
- October 2008: Presentation of the programme conditions.

2.6.3. Workpackage 6 TOOLS deviations from the project workprogramme

They were two kinds of deviations : some are negative and other ones are positive.

We faced two negative deviations.

The first one is translation, as we mentionned in part 1.3 about general problems we encountered. It is not possible to work in English with end actors. The linguistic possibilities of our cooperative platform was not sufficient for multi-lingual exchanges at this level. We lose much time to translate information and reports. It provokes a jam at the coordination level, because the translation capacities were insufficient to respect the delay and because many mails are sent to make the control. The intermediary regional coordination was a first solution to organize debates with the partners of each observatory, then the results were presented to actors who have better linguistic skills. All the meetings were organized in three languages : English, Spanish and French and some regional workshop were also organized. As mentioned previously, we also require that each CAENTI participant have translation force to English, in order to get rid of the translations jams at the coordination level. The situation is not perfect yet, but it is already clearly better.

The second negative deviation was a too optimistic planning for this first period. As we mentioned in the mid-term progress report, the contents specifications will require more time than a year, mainly to finish the guidance notes. The comparisons are made one after the other one, whereas we imagined we will make several ones at the same time. Likewise, the European synthesis included mid-term steps because of the quick constitution of national sub-groups. They allowed end actors making a first concrete synthesis, before a more abstract one that implied an more impersonal approach. These steps did not slow down the definition of a first guide, because it is a very concrete issue for the actors. The contents definition harmonization, the description of the data processing protocols modeling and the use recommendations are more technical and abstract operations. They will have to ingrain in the experimentation reality. Comparative research proved itself to be heavy since we firstly had to define a common language, in fields where the national and regional disparities remain important. To find a more efficient organization, we merged the WP6C and WP6G coordination groups during the Conference of ALBA IULIA, in the prospect of the WP6G group. Once the European guide defined many proximities and links between contents, protocols and uses, comparative research implied the same researchers at the coordination level. We also strengthened the regional intermediary levels that were organized in Spain, Belgium and France, to make national harmonizations, before the European harmonization level. In relation with the CAENTI initial ambition, which was to harmonize the three tools contents – guide, repertory and contextual indicators, at the European level during the first period, the objective of harmonizing the guide indicators became a more realist priority. Indeed, the repertory information and the contextual indicators will be determined in articulation with the guide questions. The tools guidelines drafting was postponed to the second period. This task will be more concrete in the context of the «migrants» experimentation.

The actors' and researchers' mobilization is not questioned. The acquired results at the level of the tools and of the contents specifications, especially at the European diagnosis and evaluation level resulted from a deep participation of the CAENTI territorial actors and researchers.

We also faced two positive deviations.

The first one was we fastly progressed in the definition of the specifications of the data processing tools. Once defined the European guide, many computing specifications were

early implemented: PRAGMA, ANACONDA, services repertory and Territorial Information System. We are also in advance as regards the design of the Territorial Intelligence Community System, which offers a global framework for the tasks we planned for the after-2006 : specifications of the online Inclusion Itinerary Accompaniment File in 2007 and design of the European Portal of Territorial Indicators in 2008. It also gives a framework to integrate documents and data analysis modules in an editorial working flow, according to the actors uses. Consequently, we can more clearly determine concrete tasks to be done as modules that are inscribed in the project whole execution.

The second positive deviation is the experimentation of six territorial diagnoses with the "migrants" guide in Spain. It was an excellent opportunity because of the fast development of the CATALYSE migrants observatories, which are supported by ACCEM [FERNANDEZ, 2006]. This experiment is made within a network of six migration observatories in Spain, among which three are experienced, GIGON, SIGUENZA and GUADALARAJA, and three are new ones, OVIEDO, SEVILLA and LEON. As the migrants guide includes an important indicators set of the European guide, it is an indirect experience of the European guide. It gives to the comparative research 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 as 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 collection;

- The data analysis according to local and national levels;

- The tool use in the frameworks of local partnership and national networks.

This experiment gives the occasion to test a "collect" version and a PRAGMA online one. The data processing of the six observatories data will give the possibility to save time. It is true during RP1 we have performed tasks that were planned for the RP2, but we did nor achieve all the tasks that we committed to make during the RP2. Nervertheless, it is sure that these advancement states will balanced and that we will be in time on our plans and on the deliverables list at the end of the RP2.

2.6.4. List of workpackage 6 TOOLS deliverables

Del. n°	Deliverable name	WP n°	Date due	Delivery date	Estim. P/M	Used P/M	Lead contrac-tor
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
61	*Report on feasibility of a European Observatory of the Rural Schools.*	6	36		5	0,75	UNISA
					44,25	43	

2.6.5. List of workpackage 6 TOOLS next milestones

Del. No	Deliverable name	WP n°	Lead participant	Estimated person months	Nature	Dissemination level	Delivery date
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	UFC	16,75	R	PU	22
58	Specifications for the processing and editorial chain from territorial data to results.	6	UFC	8,50	R	PU	22
59	Portal on institutional territorial indicators available on internet in Europe.	6	UFC	20	O	PU	36
60	Specifications for a Territorial Information System.	6	UFC	8,75	R	PU	36
61	Report on feasibility of a European Observatory of the Rural Schools.	6	UNISA	5	R	PU	36

2.6.6. Conclusion and prospects of workpackage 6 TOOLS for next period

The work package 6 made decisive marches, especially with the publication of a European diagnosis and evaluation guide. The harmonization effort of this first proposal should be continued according to our research prospects, for which it is a strong reference. The technical aspect is developing in advance on the forecasts, partly thanks to the opportunity we had to experiment new solutions, as the online tools that were planned for the second period.

The territorial actors participated in the project for two fundamental reasons. The chosen method gives value to the actors' experience. The indicators selection and harmonization were established from the local scale, that is to say from economic and social contexts that are different between them and different from the reality representation, which results from a global analysis.

Then, this research action led the actors to observe the local reality from a European point of view. Establishing the indicators that allow comparing the gathered information at different territorial levels in a country, then between different countries of the European Union, required an interesting abstraction process for the territorial actors.

The researchers were also strongly involved in the coordination of the comparative research action. Celia SANCHEZ LOPEZ of the University of HUELVA made an important work on this topic, but it was also the case of Julien CHARLIER and Di CHEN of the University of LIEGE, Maria José ASENSIO COTO of the University of HUELVA and Cyril MASSELOT of the University of Franche-Comté. The coordination was firstly made at the national scale – some would say at the regional one, at the sub-groups (composed by actors and researchers) level-. These sub-groups appeared with the CAENTI. The actors came with

their experiment and the researchers brought a new look, their documentary competences and their ability of analysis and abstraction. It strongly contributed to the execution of a European synthesis, whereas we started from extremely various local contexts. The actors also cooperated together. OPTIMA and INTEGRA jointly made and drafted some syntheses. The ACCEM observatories, which have a strong individuality, harmonized their diagnosis and evaluation guides and they very quickly implemented the "migrants" synthesized guide. They divided up the first notes between them. Intermediate coordination, which had a linguistic origin, was also linked to differences at the intervention devices and publics level. They were stages that did not handicapped the general synthesis but on the contrary that helped to do it. All the actors and the researchers who are involved in the WP6 participated to this general synthesis, even those who did not belong to any sub-group, and there are strong individualities as VALDOCCO, the University of ALBA or ADAPEI. The latter, COCAGNE, BARANYA, the University of PECS and SAZU ZRC, which more experienced online systems, already prepare the next step. Tunghai University gives a very interesting opening, through the environmental and social impact of the Industrial and Science Parks in Taiwan. The University of SALERNO was implied in the design of the European Observatory of Elementary School. Periodic meetings, which are regular at the sub-groups level and punctual at the work package one, and the cooperative workspace CooSpace played an important role in this dynamic.

We also noticed that transversal collaborations are being implemented between the work packages. They will maybe imply an evolution of the coordination action organization according to cooperation that are being established between the coordination groups.

Several convergences appear between the work package 6 and other work packages. They underline transversal prospects.

The main convergence took place with the work package 4 at two levels. Firstly, with the WP4I coordination group, that makes an inventory of the European territorial information, at the contextual indicators level. The WP4I group cooperates to the selection of contextual indicators to which it will be possible to compare the guide questions. The WP6C group should draft a list of questions that are usually confronted to indicators. The WP4I will study the corresponding territorial information.

Then, the WP6 took contact with the W4T which thinks about the concept of territory, the thematic of the relevant territory or the thematic of the difficulties the multiplicity of sector cuttings creates for the multi-sector partnerships to make a confrontation with the territorial information.

We can also underline a parallel between the histories of the observatories that were created by the actors and the research-action experiments that were made by the researchers in the framework of the WP5 on the governance principles.

Lastly, some actors started wondering about complementary tools or tools that would be different from the CATALYSE ones. OPTIMA started an experiment of community development at the level of a very underprivileged area, by exploring other treatments and tools. ACCEM has experimented the competence trees, in parallel to the CATALYSE tools use.

One the prospects side, most of the specifications for the "CATALYSE Toolkit" are now given : diagnosis and evaluation guide, PRAGMA, ANACONDA, services repertory and Territorial Information System. The main tools, especially the "collect" version of PRAGMA, were worked out. As regards the "migrant" guide, it is still being experimented. The WP6 will

now coordinate the latest specifications and carry out the CATALYSE Toolkit tools and guidelines.

The specifications of the deliverables n° 51, 52, 53, 54, 55 and 56 are sufficient to start the coordination of the working out of the CATALYSE Toolkit and of its guidelines.

We have a first version of the European Guide of Diagnosis and Evaluation. Its contents were debated among the CAENTI participants and with their partners in the observatories. The meanings of the guide topics, questions and modalities are defined. They surely need to be more debated as regards the national and regional specificities. Nevertheless, we can consider we have good bases for this debate (deliverable 51, updated in part 3 of the deliverable 56).

This guide will evolve. Indeed, all the guides in the CATALYSE observatories regularly change, each year at the beginning. The observatories have a protocol to plan the guide changes. The guide changes protocols will be one of the guidelines elements.

The guide will also evolve with its experiment. We took advantage of the opportunity to organize an important experiment with the "migrants" guide, which includes most of the European guide questions. ACCEM is working on the problems that were faced concerning the questions understanding and the guide modalities by end users. Besides, ACCEM observatories will organize discussion groups on this topic.

To enlarge the experiments, we should translate the guide in professional versions that will be written in the end users' languages. The University of HUELVA will edit it in English and Spanish, and the University of LIEGE will do it in French. We will do further translations in other languages, but they are not planned yet.

The services repertory contents were also selected (deliverable n° 52). An important part is based on the guide contents to prepare a comparison between needs and services. Now, we need to complete the definition for other special information.

The territorial indicators were selected too (deliverable n° 53) from a selection of the guide questions. We thought this task would be easier because the guide questions selection was based on the European standards. Nevertheless, the difficulty results from the need to confront the indicators at a local level, which depends on the accessibility of the territorial indicators at this level. The WP4I group, which is in charge of territorial indicators, studied this accessibility (deliverable n° 53). The work package 6 and the WP4I group began to precisely examine the accessibility of the European standards and of compatibles national or regional indicators at the territorial level, before achieving the selection and the gathering of indicators meanings.

A great work was done about the CATALYSE tools of data collection, data analysis and editing.

One part of the research on conceptual and methodological specifications, that is to say putting online the guide as an "Inclusion Itinerary Accompaniment File" in 2007, then designing and making a specialized portal on European institutional indicators that will be useful for actors in 2008, are done with the concept of Community System of Territorial Intelligence (deliverable n° 55). This concept allowed designing in a coherent way :

- The integration of data analysis and spatial analysis tools;

- The integration of the data analysis and processing protocols in a logical chain;

- The integration of all information and documents that are gathered or produced by the cooperative work, from the collection to the edition, through all the steps of data processing and cooperative work, in a coherent documentary and editing chain;

- According to the governance and the social uses of the community, particularly the organization and the animation of the partnership.

The WP6P group defined the conceptual, methodological and technical specifications of PRAGMA, and more globally of the data collecting, coding and analyzing functions, with two options: a standalone multi-platform version and an online version. In every case, these functions will be worked out thanks to free tools; they will also be free tools (deliverable n° 54).

Within this general framework, the WP6 carried out data collecting tools:

- A "collect" version of the current version of PRAGMA, without questionnaire management and data analysis functions, in Spanish, for the "migrants" guide. It will be quickly available in English with the European guide and, if needed for experiments, in other languages.

- An online prototype of the data collecting part of PRAGMA, which will be documented.

The WP6P also began computing specifications for:

- A "collect" standalone multi-platform and multi-language version of PRAGMA;

- A data quantitative analysis standalone multi-platform and multi-language version of PRAGMA, with questionnaire editing functions;

- An online data collecting multi-language version of PRAGMA, with access rights adapted to the partnerships specificities.

These versions will be jointly carried out in 2007, because we want they can jointly work in order to feed a same data basis. The computing specifications for a complete standalone multi-platform and multi-language version will be drawn, in order to carry out a first version in 2007 and to integrate it with ANACONDA and NUAGE.

The WP6P detailed the technical specifications for the PRAGMA integration with the software of qualitative data analysis ANACONDA and NUAGE (deliverable n° 55). A first step will consist in the integration of ANACONDA and NUAGE in a multi-platform and multi-language version.

The technical specifications completed the contents specifications of a services repertory for CATALYSE Toolkit (deliverable n°52). The services repertory will be carried out from theses specifications.

On the basis of the specifications about the services repertory, the WP6P also started a research action concerning the implementation of a CATALYSE observatory website with a popular content management system (CMS). In the entire surveyed observatory, the services repertory was the first Internet service offered by the observatory. The repertory needed the development of a minimal website to be put online. Afterwards, the observatory used this website to add some information services as news, agenda, diagnosis results, workshops activities, etc. Some years ago, it was necessary to code such product, with poor possibility for the users to update data. It is presently possible to make the same product, at a generic level, with a content management software. The user only needs to add graphics and contents. He can easily manage the contents, as in a personal blog. The WP6 project to do such a CATALYSE web site includes the services repertory.

Then, the services repertory will be able to become part of the TICS.

The methodological technical specifications of a Territorial Information System are also given (part four of this report). They are free tools which are useful to draw maps and to make spatial analysis. They could be easily integrated in the TICS, thanks to data analysis tools. For this tool, the specifications are close to the guidelines.

The WP6G group also did an important work of information gathering about the CATALYSE tools uses, to define the data analysis protocols. It also aimed at defining some recommendations for the new users who want to implement CATALYSE tools. The WP6 summarized the data analysis protocols of the guide, question by question (chapter five of the deliverable n°56). Due to the practices specificities, some proposals are presently debated to more precisely define the coding and the recoding. The analysis of the ACCEM migrants guide data in six observatories, and the synthesis into a unique protocol will also enrich the data analysis protocol of the European guide. We will further precise the repertory data analysis protocols and the territorial indicators contents.

The gathering of experiences, uses and practices was very useful to reinforce the coordination work within the CAENTI because it improved the knowledge about the CAENTI observatories. These exchanges showed the actors have common issues and histories. The exchanges about the uses allowed detailing basic elements of the CATALYSE governance, mainly concerning the management and the animation of the development partnership. The WP6G established a list of diagnosis, evaluations, observatories and development partnerships that use the CATALYSE method in Europe (chapter 1 of the deliverable n°56). This list will be completed by a documentary survey to precise the dates, the volume and the data characteristics, the documents and the analysis results, the type of publics, in order to draw a map with the main types of publics and to constitute a data basis.

The WP6G presented five CATALYSE observatories plus three detailed observation mechanisms (chapters 5 and 6 of the deliverable n°56). OPTIMA and INTEGRA have begun a joined comparative history of their experiences. It will be the basis for a comparative research action aiming at underlining the management and communication importance in the CATALYSE implementation in a partnership and to release recommendations for new users.

The technical specifications for the tools of the CATALYSE Toolkit are now given, as we planned. Tools exist presently: PRAGMA collect version, complete PRAGMA version for data analysis, ANACONDA, NUAGE, online services repertory and Territorial Information System. We began to develop more accessible versions, free, multi-platform and multi-language. The achievement of the tools of the CATALYSE Toolkit is coordinated by the Université de Franche-Comté.

In the next future, we will write the guidelines. The meanings definitions for the guide are done. The repertory and territorial indicators ones should be completed. We start gathering the tools guidelines that are drafted by the observatories.

The experiment of six territorial diagnoses with the “migrants” guide in Spain is very useful to achieve the technical guidelines. It is an excellent opportunity due to the fast development of the migrants CATALYSE observatories that are supported by ACCEM [FERNANDEZ, 2006]. This experiment is done within a network of six migration observatories in Spain, three experienced ones, GIGON, SIGUENZA and GUADALARAJA, and three new ones, OVIEDO, SEVILLA and LEON. As the migrants guide includes an important indicators set of the European guide, it was an indirect experience of the European guide. We can study in the same time:

- The contents understanding by the end users and how to create a common language at this basic level, as the first condition to improve data quality;

- The tools use by end users with poor computer skills;

- The quality of the data collection;

- The data analysis according to local and national levels;

- The tool use within the framework of local partnerships and national ones.

ACCEM and the University of HUELA, with the help of VALDOCCO, will be in charge of animating, starting from these guidance notes and from this experience:

- Guidelines for the contents evolution;

- The complete definition of the contents meaning;

- The guidelines of the data analysis tools;

- The data analysis protocols.

The University of Liege, OPTIMA and INTEGRA, starting from the joint recommendations of OPTIMA and INTEGRA, will be in charge of animating the writing of the use recommendations.

The observatories of ACCEM, OPTIMA, INTEGRA, ADAPEI and VALDOCCO will be closely associated to the comparative research, which will lead to the guidelines of the CATALYSE Toolkit.

We also prepared, and sometime began to experiment, online versions, and we also started to design an integrated system. The WP6 will continue, as planned for 2007 and 2008, a prospective research about an online version of the CATALYSE tools. This research activity is already advanced.

In 2007, the WP6D research coordination group will gather a narrow researchers and engineers staff to design the data processing tools. ACCEM, ADAPEI and COCAGNE, which are experienced actors in online tools, will be associated to this research action about contents and uses. These guidance notes include numerous elements about online tools.

The following communications were published after the works of the workpackage 6 TOOLS :

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FERNANDEZ QUINTANILLA Julia, MAHIA CORDERO Javier, CARLES BARRIOPEDRO Braulio, GIRARDOT Jean-Jacques, MASSELOT Cyril, 2006. ACCEM Observation Strategy .

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MAHIA CORDERO Francisco Javier, 2006. ACCEM experience in the implementation of a territorial management system of social and professional skills since immigrant labour insertion and social integration process in Spain.

SANCHEZ LOPEZ Celia, GIRARDOT Jean-Jacques, 2006. Specifications for the guide of diagnosis and evaluation in the CATALYSE method.

SECTION 3 – CONSORTIUM MANAGEMENT

These issues are treated in the deliverable 2, "First periodic management and financial report".

PERIODIC MANAGEMENT REPORT

The Periodic management report is the deliverable 2, as define in the DOW.

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