



CITIZENS AND GOVERNANCE IN A KNOWLEDGE-BASED SOCIETY



caENTI
Coordination action of the
European Network of Territorial Intelligence

www.territorial-intelligence.eu/caenti/

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EXECUTIVE SUMMARY

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

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

- Tools for actors
- Fundamental methods
- Governance principles

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

The WP6 “Tools for actors” carries out the CAENTI objective. Upstream, on the one hand, it is fed by the WP4 “Fundamental methods” that gives it technological solutions that come from research generic tools and, on the other hand, by the WP5 “Governance principles” that evaluates these solutions acceptability by referring to sustainable development.

The CAENTI also aims at making data sets that are applicable for multi-disciplinary research activities and for territorial development.

In this period, the WP6 TOOLS aimed at integrating the CATALYSE tools and facilitating their access on Internet.

The WP4 METHODS objective was to draft states of the art about five topics: territorial information, methods to analyze it, concept of territory, indicators of territories competitiveness, and territorial intelligence projects.

The WP5 PRINCIPLES intended to draft a “CAENTI *Quality Letter* on Action-Research Favouring Territorial Governance of Sustainable Development”

The WP3 PORTAL designed the general restructuring of the territorial intelligence portal, in a dynamic and communicational version, with new services.

The WP2 CONFERENCE planned the conference of HUELVA “Territorial Intelligence and Governance” on October 2007

The WP1 MANAGEMENT aims at getting an efficient and equitable distribution of means.

The WP6 TOOLS 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. It strongly contributes to the CAENTI global objective.

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 elaborating, managing, observing, evaluating and transferring participative projects in multi-sector partnerships.

In 2006, the WP6 defined the specifications of a CATALYSE Toolkit, on the basis of the CATALYSE method. CATALYSE has been used for several years since 1989 by most of the CAENTI participants in multi-sector observatories. The latter ones use similar tools but gather and process different information contents. The toolkit gathers an harmonized guide for diagnosis and evaluation, a service repertory and a selection of territorial indicators with tools for quantitative, qualitative and spatial analysis.

In 2007, in order to integrate the CATALYSE tools and facilitating their access on Internet the WP6 drafted:

- The specifications of the file, an online “Inclusion Itinerary Accompaniment File”
- The specifications for the processing and editorial chain from territorial data to results

It also enlarged its research activities towards:

- The coordination of the CATALYSE Toolkit execution
- A more global survey and experimentations about the uses of territorial tools in development partnerships

After the design of the CATALYSE Toolkit, the WP6 drafted the specifications of the integration of these tools at a upper level, online, in a Territorial Intelligence Community Systeme (TICS) designed from the actors needs and uses. The specifications are those of the TICS, the data processing ones and the ICS ones. The prototype tools are epragma, the CMS CATALYSE and mapping online solutions. The research actions on the TICS modelling concerned:

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

As the technical specifications for the tools of the CATALYSE Toolkit were given, and there were already tools:

- PRAGMA key-in version used by ACCEM Experimentation
- Complete PRAGMA version for quantitative data analysis,
- ANACONDA and NUAGE for qualitative analysis.

The WP6 began here, to develop the specifications for more friendly, free, multi-platform and multi-language versions, for the CATALYSE Toolkit:

- jPRAGMA, java version of PRAGMA
- Integration of the software ANACONDA and NUAGE, in a new version of ANACONDA.

Then, the Wp6d also focused on the online versions in the prospects of the TICS:

- epragma: online version of PRAGMA, to link to jPRAGMA
- eanaconda: online version of java version of ANACONDA and NUAGE
- CATALYSE CMS: web site pattern, including the Territorial Indicators System (see deliverable 56), the repertory (see deliverable 52), a library, and the access to the CATALYSE toolkit.

As a consequence, the CATALYSE Toolkit will offer a complete set of statistical and spatial analysis tools that will be accessible online when the present prototype will be tested; this experimentation is in particular done by ACCEM.

In order to reach the WP4 METHODS objective of drafting states of the art, the coordination group Wp4t Territory started a European comparative survey of the research activities concerning territory and its conceptual approaches. The Wp4m Methods worked on the interpolation methodology, on interactive cartography and focused on observation as a meta-method. Wp4i Information continued its comparative inventory of territorial information available on Internet and sources in Europe and on national statistics websites. Starting from the “Pyramid model” Wp4c defined an indicators system which consists in 30 indicators of the territories competitiveness. Wp4p established, on the one hand, that there are no relevant information for territorial intelligence in the GDs in addition to those that are

published on the EU official websites and, on the other hand, that all the relevant projects funded by the GDs can also be found on CORDIS.

The coordination group Wp4m Methods kept making research activities on the generic methods of territories analysis. After data analysis, spatial modeling and a first approach of GIS, which constitute the fundamental basis, we paid attention to two appended but indispensable techniques. Each of them is located at a boundary of the information processing chain: interpolation of spatial data that is particularly useful for the environmental data management, and dynamic cartography that is efficient in the phase of results presentation of an analysis, a diagnosis or an evaluation. Lastly, an important work started concerning the territories observation, which is considered as a meta-method. We planned to work again about the GIS during the second semester of 2008 (deliverable 28).

The coordination group Wp4i Information was involved in the seeking for indicators on national European and international statistical websites compatible with the CATALYSE file. It updated and extended the selection established for the guide in the previous period. It analyzed in which conditions they are available at the local level and established a correspondence between available indicators on statistical websites and the questions of CATALYSE guide at the lowest spatial level. As an example Wp4i selected 20 indicators suitable for INTEGRA Plus (Belgium) diagnosis (deliverable 29).

The group Wp4p Projects tried to identify projects which object corresponds to the questionings of territorial intelligence among the projects that were supported by EC, and the relevant information for territorial intelligence the GDs of the EC have, in addition to those that are published on the official websites. He tried to answer a suggestion of the CAENTI project evaluators. It firstly made a project selection by using Internet, and then asked the GDs of the EC about such projects and information. They generally advised us to consult CORDIS (deliverable 30).

Then, it drafted an interdisciplinary definition of the territory concept, the Wp4t “Territory” started elaborating an European state-of-the-art about territory based on a multidisciplinary approach. Wp4t group also initiated with OPTIMA (Belgique) an approach of the appropriation of the territory concept by territorial actors. It looked for an operative definition of the territory concept.

The coordination group Wp4c Competitiveness gathered the notion of territorial competitiveness. After a comparative research action it defined the situation of territorial competitiveness within wp4 and CAENTI. Starting from the pyramid model, we defined an indicators system, which consists in 30 data, Wp4c typed the graduations of competitiveness of Hungarian micro-regions. Later, Wp4c will compare this system with the European level. Wp4c also started research actions within territorial intelligence as a comparative research of human resource and labour market problems of small villages (deliverable 32).

Within WP4, the groups Wp6i and Wp6c that both work on territorial information made several joint meetings in order to contribute to the Wp6i. They prepared their integration in the portal of territorial information. In the same way, Wp6t and Wp6m worked together in the prospect of the Territorial Intelligence Community System.

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

The starting point of the WP5 during this period was the document *Application of the governance principles of sustainable development to territorial research-action* (Deliverable 40, published on the CAENTI Website) as the result of the WP5 performance during the first year of the CAENTI Project (from March 2006 to February 2007). Based on the conclusions of this initial work, during the period March 2007 to February 2008 the debate entered in greater depth and the drafting of the action-research protocols inspired by these principles was undertaken.

After two coordination meetings (in Madrid in April and in Huelva in September) a proposal of *Quality Letter* was drafted by a sub-group of the WP5 and it was debated during the International Conference of Huelva in October 24th to 27th by researchers and territorial actors, either member or not of CAENTI.

After the Conference six work-groups led by the six European universities involved in WP5 worked, in collaboration with the territorial actors they usually work with, on evaluating their research-actions process (mainly those included in the 2006 Catalogue) considering the criteria and principles included in the Quality Letter. They wrote in their reports (D41 to 46) the conclusion about this evaluation process.

The result of this participative debate was the *CAENTI Quality Letter on Action-Research Favouring Territorial Governance of Sustainable Development* (Public Deliverable number 47).

The proposal of Quality Letter was complemented by an e-tool to assess the quality letter of a particular project. A first version was presented during the Conference. The work teams were asked to review and complete this instrument. The objective of this tool is to be filled in by the participant of the action-research group in an auto-assessment process. It is available for visitors on the CAENTI Portal on Internet (<http://www.territorial-intelligence.eu/caenti/quality/>) (deliverables 41 to 47).

As a dissemination activity, the WP3 PORTAL strategy is to create a dynamics of intellectual cooperation between people, in creating internal cooperation between teams, entities. This permanent objective is fulfilled with the extranet (Intra-consortium and CooSpace).

During the first six month (March 2007-August 2007) of the concerned period, the general restructuring of the Territorial Intelligence portal implied an important and deep work. A new version of the portal, accompanied by many services, was put online for the scientific community and the general public at the end of September 2007 and was presented during the *International Conference of Territorial Intelligence, Huelva 2007* in October 2007.

During this conference, the steering committee decided that the WP3 will also be in charge of the consortium external communication and of edition.

Activities of the last period will exploit the results of the survey WP3 led (Use study and needs analysis) and cover in live Besançon 2008 through the conference blog.

The WP2 CONFERENCE organized the annual International Conference of Territorial Intelligence “Territorial Intelligence and Governance. Participative research-action applied to territorial developpement” in HUELVA, on October 2007. Final attendance was 132 participants from 11 countries and 55 communications were submitted. The WP2 also edits the acts (deliverable 14)

It also published the advertisement and call for papers of the next conference in BESANÇON on October 2008 (deliverable 15). This conference will pay a special attention to the tools, the generic scientific methods that inspire them, and to the links

between scientific research activity and territorial action. The call for papers suggested three themes:

- The Territorial Intelligence tools for and by the sustainable development actors
- The scientific methods and generic tools of analysis of the spatial and territorial information
- The evolution of the Territorial Intelligence concept

WP1 drafted the financial and scientific periodic report (deliverables 4 and 5) and a first IDM report (deliverables 3 and 6)

General prospects for 2008 and last period are:

In 2008, WP6 TOOLS planned to design a portal on European Territorial Indicators that are useful for the end actors, and to draft the specifications of the TICS according to the uses of end actors. A new coordination group Wp6u will have to organize the inventory of all the territorial intelligence development partnerships and their databases in Europe and to coordinate experimentations.

Main objective of WP5 GOVERNANCE is the integration of the present thinking state and of the results as useful principles for actors. It will focused in the elaboration of:

- A catalogue of participation research-action methodologies, especially those suitable to be applied to territorial intelligence development projects.
- Elaboration of a catalogue of technological tools
- Elaboration of a Video: “Research is at territories intelligence service.”

WP4 METHODS will complete the states of the art and make a synthesis about the territory concept, the territorial information including competitiveness indicators, and the scientific methods and generic tools of territorial information analysis that can be adapted as tools for actors.

WP3 main effort will consist in covering in live Besançon 2008 through the blog of the conference, communicating on caENTI scientific results and in launching a network around formation in the field of Territorial Intelligence.

WP2 will organize the conference in BESANÇON, on October, 16th and 17th, 2008.

WP1 will provide an efficient scientific, financial and IDM management

SECTION 1 – PROJECT OBJECTIVES AND MAJOR ACHIEVEMENTS FROM MARCH 2007, 1ST TO FEBRUARY 2008, 29TH

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

1.1. Overview of CAENTI general objectives

CAENTI activities, like those of all the 6th FP actions, fall under the prospect of the ambitious objectives the Summit of LISBON of 2000 gave to the European Union: becoming the most competitive knowledge-based economy, having a sustainable growth and improving social cohesion.

CAENTI, as a general objective, aims at integrating present research projects on territorial intelligence tools, so as to give them a European dimension. To do so, it works out three activities of comparative research coordination and two activities of dissemination.

The research coordination activities correspond to three “work packages” (WP), according to the denomination of the European programs:

- Tools for actors
- Fundamental methods
- Governance principles

They are articulated according to the following diagram:

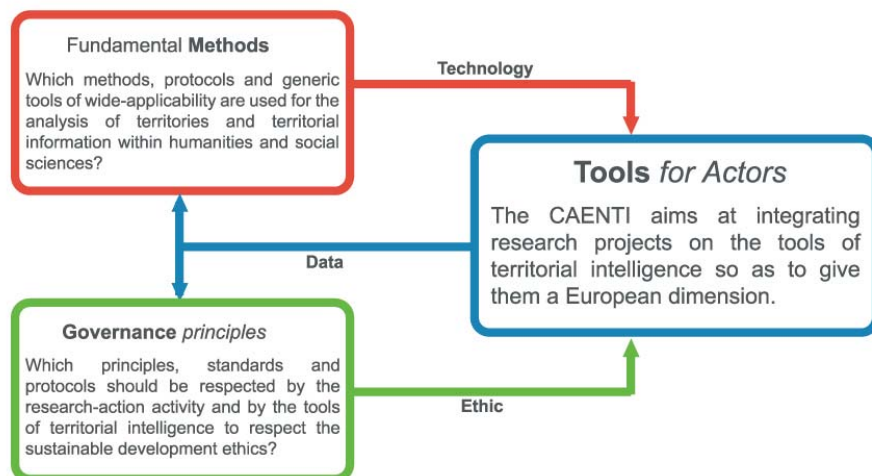


Diagram 1: Research coordination in the CAENTI

The WP6 “Tools for actors” carries out the CAENTI objective. Upstream, on the one hand, it is fed by the WP4 “Fundamental methods” that gives it technological solutions that come from research generic tools and, on the other hand, by the WP5 “Governance principles” that values these solutions acceptability by referring to sustainable development.

The CAENTI also aims at making data sets that are applicable for the multi-disciplinary research and for territorial development.

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

This part presents the objective, the progress of 2007 and the objective for 2008 of each caENTI workpackage.

1.2.1. Tools for actors research activities: WP6 TOOLS

This activity, led by the Université de Franche-Comté (France), designs, makes and disseminates methods and tools of territorial intelligence that are accessible to territorial actors and respect the ethics of sustainable development.

For several years, the European Union has introduced the demand of project management and assessment. Since GOTHENBURG, in 2001, sustainable development has established the principles of good governance: participation, well-balanced approach and partnership. Scientific approaches adapted to these principles are available for experts, but the territorial actors more rarely benefit from simple and cheap tools to draft, manage, observe and value their projects. Such instruments mobilise research, which provides a quality guarantee, and territorial actors that experiment and value them. Consequently, the CAENTI associates research teams and actors to create tools of territorial intelligence.

This coordination activity aims at giving a European dimension to the CATALYSE tools that have been using by the CAENTI participants since 1994 in various territorial contexts and on different publics. The WP6 TOOLS on the one hand makes a synthesis of the indicators and tools that are used, as well as the uses the actors make of them. On the other hand, it brings the indicators closer to the European standards.

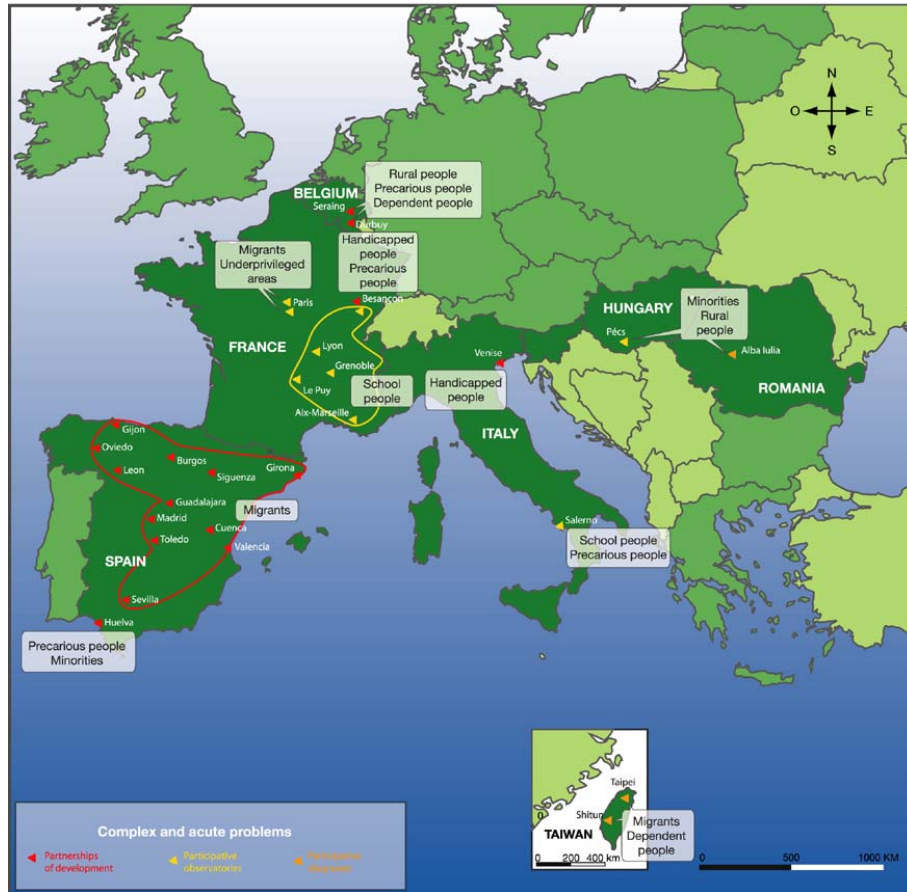


Diagram 2: Use of CATALYSE tools in Europe.

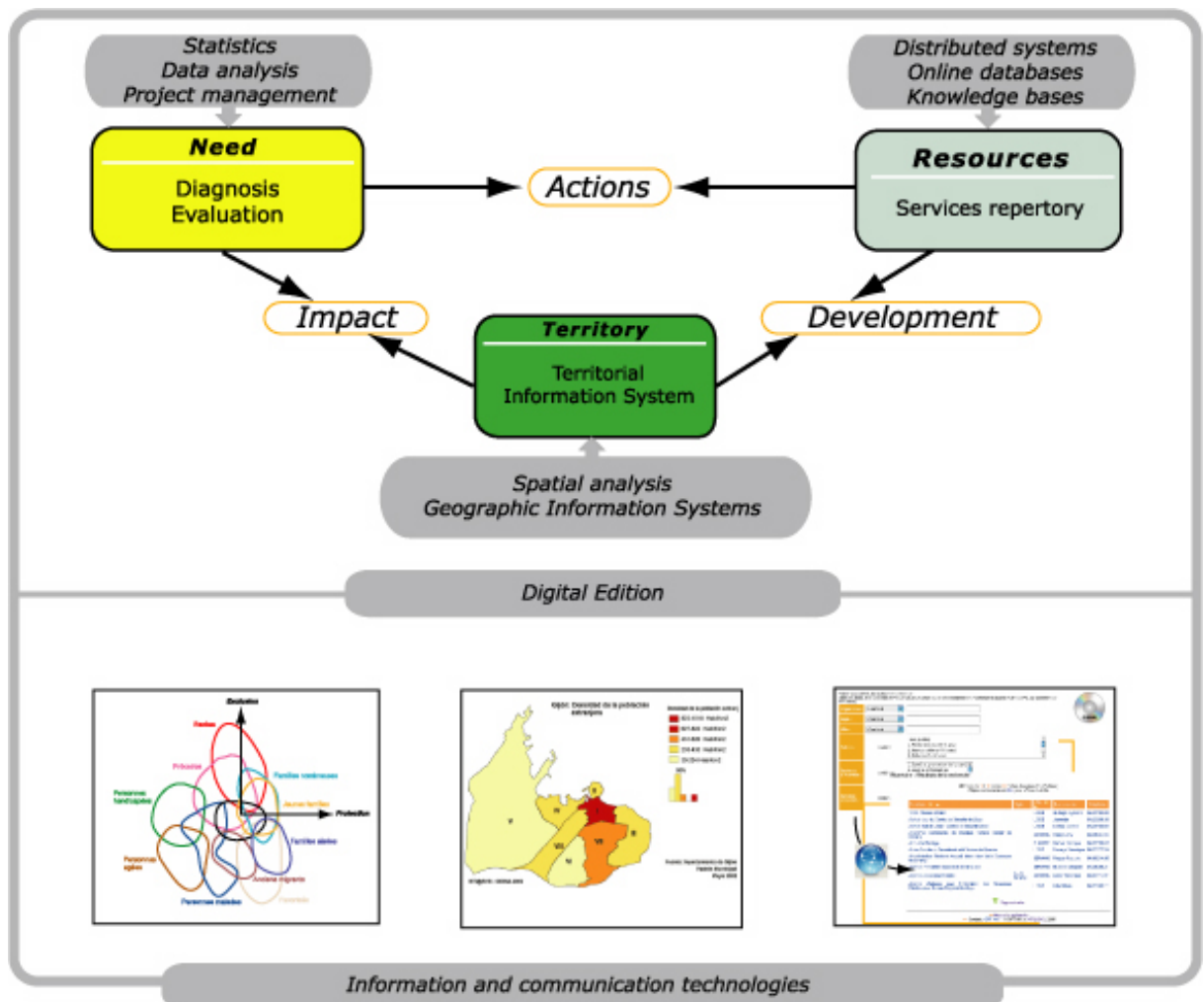


Diagram 3: CATALYSE method and tools.

The WP6 also aims at identifying and evaluating complementary tools (or new tools) of territorial intelligence.

The design of a European Observatory of Elementary School is another activity of the WP6.

In 2006, the WP6 defined the specifications of a CATALYSE Toolkit, on the basis of the CATALYSE method. From the experience of the CATALYSE projects and according to European standards (if they exist), WP6 harmonized the guide for diagnosis and assessment, the services repertory, the territorial information system and the tools.

In 2007, the WP6 worked on the planned research activities, the drafting of:

- The specifications of an online “Inclusion Itinerary Accompaniment File” (IIAF). This file is a broader document than the guide. As digital documents, they will allow a better individual follow-up, an individual project elaboration and the user's inclusion itinerary assessment, by a multi-sector and multi-professional team of stakeholders;
- The specifications for the processing and editorial chain from territorial data to results in order to integrate tools and set them on line.

It also enlarged its research activities towards:

- The coordination of the CATALYSE Toolkit execution;

- A more global survey and experimentations about the uses of territorial tools in development partnerships.

These research activities prepared for 2008 the specifications draft of:

- A European portal of territorial indicators available on line;
- A territorial information system adapted to the development partnership uses, the Territorial Intelligence Community System.

We will suggest in this conference a new research activity on uses and projects of territorial intelligence.

1.2.2. Fundamental methods research activities: WP4 METHODS.

This activity, led by the University of PECS (Hungary) studies the spreading of fundamental methods and research procedures in territorial information analysis within Humanities and Social Sciences. These fundamental methods and the generic tools can provide technologies and tools that are accessible for a professional use. Nevertheless, their use remains limited and unequal according to the disciplines and universities within HSS.

As a consequence, the WP4 METHODS aims at answering two questions:

- What are the methods, protocols and generic tools of wide applicability that are used to analyze the territories and the territorial information within Humanities and Social Sciences?
- How to improve their diffusion within Humanities and Social Sciences?

During the first two years, 2006 and 2007, the WP4 worked on five themes that prepare a final synthesis in 2008.

1. The fundamental methods and generic tools of territorial information analysis (led by the Université de Franche-Comté, France) in Wp6m “Methods”.
2. European territorial information (led by the Université de LIEGE, Belgium) in Wp6i “Information”.
3. The assessment of territorial intelligence projects that are supported by the European Commission (led by the Université de Franche-Comté, France) in Wp6p “Projects”.
4. The concept of territory (led by the Università di SALERNO, Italy) in Wp6t “Territory”.
5. The indicators of territories competitiveness (led by the University of PECS, Hungary) in Wp6c “Competitiveness”.

1.2.3. Governance principles research activities: WP5 GOVERNANCE.

This activity led by the Universidad de HUELVA (Spain) analyses the application of the governance principles of sustainable development to the territorial research-action.

The WP5 GOVERNANCE wonders about two questions:

- What are the best practices in the scientific production that inspire territorial governance whilst respecting sustainable development?
- Which ethic principles, standards and protocols should respect the territorial research-action and the tools of territorial intelligence?

Six universities firstly made “experiences catalogues” on their practices in the field of research-action and on the impacts, potentials, risks and constraints of the governance

principles of sustainable development. Then, a European “letter of quality” was drafted in 2007. Next year, 2008, will be a dissemination period with:

- The identification of the technical constraints that result from the respect of ethical principles;
- The definition of the technological developments that encourage these principles application.

1.2.4. Dissemination activities

The dissemination activities also constitute two work packages:

- Portal of territorial intelligence: <http://territorial-intelligence.eu>
- International annual Conference of territorial intelligence.

The Université de Franche-Comté (France) animates the portal. In addition to its Internet part, it includes an Intra-consortium website that only concerns the CAENTI participants and a cooperative workspace (made by the University of PECS, Hungary).

This annual activity coordinates the scientific committee, the organisational committee and the acts publication. The next international conference will take place in BESANÇON (France), on October, 15th-18th 2008.

1.3 Progress and main achievement

The CAENTI reached notable results. Since the beginning of the second period, the objectives have been organized by WP with a global aim of convergence.

During the first one year and half of the CAENTI, we worked to specify with which meaning we used the concept of territorial intelligence within the European Network of Territorial Intelligence.

Territorial intelligence is an emerging concept. Its definition remains imprecise because it is polysemous and it is not always easy to dissociate it from other close concepts, such as economic intelligence, competitive intelligence, collective intelligence, community development, community health, co-development, decentralised cooperation, etc.

Since 1999, the partners of the CAENTI have referred to *territorial intelligence* to indicate an approach of the territorial development that is characterised by a multi-disciplinary approach, with the introduction of the spatial dimension in the human phenomena study and by the use of the information and communication technologies (ICT).

Nowadays, territorial intelligence could be defined as a community cognitive process that joints data, thoughts and skills related to a territory, to generate relevant and useful information in order to develop the territorial community in a harmonious equitable and sustainable way.

Our synthesis insists on the articulation of the basic research (knowledge), technologic (methods) and applied (tools and governance) levels:

“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-disciplinary and intercultural **knowledge** on territorial structures and dynamics.*

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

*It evaluates the **governance** principles that guarantee a well-balanced taking into account of all the needs, as well as the equitable distribution and lifespan of resources, 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.”*

Territorial intelligence is frequently defined as a kind of economic intelligence. Territorial intelligence uses ICT like economic intelligence. But it is also different:

- Territorial intelligence does not only regard the territory as a geographical space, but also as a system implying a geographical space and one or more human communities;
- It does not only consider information like a tool but also like a vector of development;
- It does not reduce the territorial development to the growth of the economic activity, but recommends a comprehensive approach like the concept of sustainable development;
- It rather bases the development on the partnership than on competition, and also on participation.

One can bring it closer to the concept of community development that “refers to voluntary changes in, by and for community” [SANDU, 2005]. But community development does not refer to ICT, which are a condition of development in territorial intelligence.

The WP2 CONFERENCE organized the International Conference of Territorial Intelligence that took place in HUELVA on October 2007 and which was a major event for the CAENTI consortium in terms of integration and joint action visibility. It also published the acts of the previous conference of Territorial Intelligence of ALBA IULIA (2006).

The WP3 PORTAL essentially aimed at contributing to the visibility and dissemination of all the CAENTI activities and results towards the greatest number. From March to August 2007, it designed a more global portal of territorial intelligence with an editorial vocation that was appreciated during the conference.

After it started defining the concept of territory in the multi-field context of the integrated approach, the WP4 devoted to deepen the study of the relevant methods and information which promote the research protocols and tools of spatial analysis and of territorial information processing within humanities and social sciences. During this period, its global objective was also to finish specific states of the art and to begin the convergence of its five coordination groups:

- Territory that studies the concepts of territory and site specification process;
- Methods that establishes an inventory of the fundamental methods of territorial information;
- Information that makes a comparative inventory of the European territorial information;
- Competitiveness that focuses on the territories competitiveness indicators;
- Projects that are funded by the European Commission and the information of the Directorate General in the field of territorial intelligence.

The main objective of the WP5 was to deliberate on ethic and methodological principles that should be respected by the research protocols of humanities and social sciences, so as the research results favour the territorial governance and the territories

sustainable development. It suggested and debated its Letter of Quality in the conference of HUELVA, on October 2007.

The WP6 enlarged its research activities from the specifications of the Catalyse Toolkit, then it also aimed at integrating the CATALYSE tools and facilitating their access on Internet. It drafted:

- The specifications of the file, an online “Inclusion Itinerary Accompaniment File”, which are described in deliverable 57
- The specifications for the processing and editorial chain from territorial data to results, which are drafted in deliverable 58

It also enlarged its research activities towards:

- The coordination of the CATALYSE Toolkit execution
- A more global survey and experimentations about the uses of territorial tools in development partnerships and their data bases

After the design of the CATALYSE Toolkit, the WP6 drafted the specifications of the integration of these tools at a upper level, online, in a Territorial Intelligence Community System (TICS) designed on the basis of the actors’ needs and uses. The specifications are those of the TICS, the data processing ones and the ICS ones. The prototype tools are epragma, the CMS CATALYSE and mapping online solutions. The research actions on the TICS modelling concerned:

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

In 2008, WP6 planned:

- To design a specialized portal on European Institutional Indicators useful for the end actors.
- To draft the specifications of the TICS

A new coordination group Wp6u will have to organize the inventory of all the territorial intelligence development partnerships and of their data bases in Europe and to coordinate experimentations.

As a consequence, we can consider the WP6 achieved its tasks of the second period, and the tasks it needed other work packages made to be able keeping working are also achieved.

The WPs should globally contemplate the convergence of the WP4 and the WP5 towards the WP6 that corresponds to the CAENTI main objective, and started leading transversal activities in this direction.

1.3. Most important problems encountered during the period.

A major difficulty since the end of 2006 has been our IDM departure. We mobilized the innovation and dissemination services of our universities in order they study our needs and suggest legal solutions to the problems we faced, in particular as regards our tools protection and our knowledge dissemination. In parallel, we look for a director who could coordinate and make a synthesis of these technical reports, whilst privileging a person with experience in the engineering sciences. We had difficulties to find an IDM because they are essentially directed towards industry and local innovation. At the end, we chose a mixed

solution with, on the one hand, Amélie BICHET-MIÑARO for documenting and contacting specialists in intellectual protection and scientific dissemination, and Jean-François RAMON, the general secretary of the Network of the “Maisons des Sciences de l'Homme” to advise and supervise the research activities Amélie BICHET-MIÑARO makes.

We also had an important problem with the drafting of the deliverable 31. Università di Salerno recruited a Phd student to make an Internet survey on the European research activities on territory in the field of Territorial Intelligence and to establish a complete bibliography about the territory definitions. This survey would feed the coordination groups Wp4t Territory and Wp4m to complete their present research activities. This Phd student started drafting a complete documentation with a systematic survey about the notion of territory. She suffered from an important health problem and she was not able to finish her survey nor to indicate where the database and the bibliography were. Due to complications, we need to wait and postpone several times the date she could work again because we can hope she can take back her research activities in a good delay. As it was also a human problem, we hesitated before asking other researchers to make this work, what we finally did. As a consequence, we asked to postpone the deliverable 31 to the third mi-term report, August, 31st 2008.

Although we have a better organisation for the drafting of reports, mainly for translations, we were overbooked by the concentration of work at the time of the reports drafting. It was amplified by important health or personal problems for some persons and by a big academic agenda due to reforms. It is not a problem of research activities progress, but of difficulties to draft report in time. To solve this difficulty and draft all our final reports in the contractual delay, we made a broader distribution of the report tasks. We planned the reports drafting to reduce their volume. We also decide to have meetings of the WP leaders to collectively draft the main reports.

1.4. General prospects of CAENTI for next period

The presentation of the first results in the part devoted to the CAENTI coordination groups at the occasion of the plenary conferences and the debates that followed can question the orientations that were defined at the beginning of the project. During these sessions and the conference of HUELVA on October 2007, the work organisation and the calendar were specified.

The prospects for the end of CAENTI are to prepare and execute the convergence of the CAENTI activities in relation with its main objective by reinforcing the collaborations within the work packages and between them. The CAENTI, which experience mainly concerns the socio-economic sector, also wishes to develop the environmental and energetic dimension.

The WP1 MANAGEMENT will finalise the coordination activities planning until the end of the project in February 2009. It will particularly work on intellectual property protection and diffusion projects:

- European Master's degree of Territorial Intelligence;
- The edition means development with a new international Journal of Territorial Intelligence.

It will plan a project to continue and amplify the CAENTI after February 2009.

The WP2 CONFERENCE will constitute an external scientific committee on the basis of the proposals of the CAENTI participants. This Committee will be in charge of the assessment of the CAENTI results quality, then of the projects preparation allowing making the European Network of Territorial Intelligence perennial to go on and amplify the CAENTI. It will publish the Acts of this conference.

It will prepare the next conference in BESANÇON, which will pay a special attention to these tools, to the generic scientific methods that inspire them, and to the links between scientific research activity and territorial action.

The communications will be divided according to three themes:

- The territorial intelligence tools for and by the sustainable development actors.
- The analysis scientific methods and generic tools of the spatial and territorial information.
- The evolution of the territorial intelligence concept.

The WP3 PORTAL will draft a global communication strategy in relation with the new portal of territorial intelligence. It will integrate all the communication means that are useful to the CAENTI results diffusion, including the annual conference. Besides, it will develop the editorial abilities.

Within the WP4 METHODS, the WP4i “Information” and the WP4C “Competitiveness” get closer on the theme of Territorial Information and Sustainable Development Indicators, in order to contribute to the definition of the Territorial Information contents the WP6 should constitute in 2008. They will pay a special attention to the integration of the environmental indicators.

The WP4t “Territory” and WP4m “Methods” will get closer on the theme of the Territorial Information analysis, so as to contribute to the definition of the specifications of the Territorial Information Community System the WP6 will be in charge in 2008.

The Wp4p “Projects” coordination group that is reduced to the assessment of the projects funded by the European Commission will get closer to a coordination group « uses » on the Territorial Information Tools Uses, which will be constituted within the WP6, with the CATALYSE projects that were studied in the WP6 and other projects of the CAENTI participants identified by the WP5 in the framework of the experience of research-action catalogues.

The WP5 GOVERNANCE will now ensure the diffusion of the Letter of Quality. It will also assess the participation of the research-action methodologies as well as of the technological tools to the territorial intelligence development, thanks to the Letter of Quality.

The WP6 TOOLS will be restructured in relation with three coordination groups, respectively contents, tools and uses.

As we previously announced, a new group called WP6u “Uses” will follow-up the task started by the WP6g in 2006 through a description of the CATALYSE observatories of the CAENTI actors, the modeling of their observation mechanisms and the drafting of recommendations regarding the implementation and the use of the territorial intelligence tools (CATALYSE and other ones) in the framework of Development Partnerships. It will integrate the experiences and the projects that are respectively identified by the WP 5 and 4 so as to execute a Map of European Projects of Territorial Intelligence. The cooperation with the WP5 will allow evaluating these projects by the means of a Letter of Quality. These research activities will allow making an inventory of the territorial intelligence databases

The coordination group Wp6f about contents, which coordinated the updating of the Catalyse Toolkit contents and the definition of online File specifications, will be in charge to update and deepen indicators by defining their meaning and their analysis protocols. Its activity will lead to the definition of the specifications of the European Portal of Territorial Information, jointly with the Wp4i+c group, in the Wp6s coordination group.

In a complementary way, the WP6d group that coordinated the tools execution and integration, within the CATALYSE Toolkit and within an online editorial chain. It will migrate to the Wp6s group so as to adapt them to the contents and to the protocols and to draft their guidance notes. Its activity converges with the Wp4t+m group, towards the deepening of the Territorial Information Community System specifications.

SECTION 2 – WORK PACKAGE PROGRESS OF THE PERIOD

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

All the elements linked to the financial management, include efforts and planning, and to the management of the consortium are drafted in the joint "Second periodic management and financial report", deliverable n° 5

2.2. Work package 2 [CONFERENCE] Annual International Conference of Territorial Intelligence. *Work package leader : Mihai PASCARU-PAG, Universitatea 1 decembrie 1918 ALBA IULIA (Romania)*

The Annual International Conference of Territorial Intelligence is a major event for the CAENTI consortium in terms of integration and joint action visibility. This part presents the work package objectives, the organization evolution, the progress toward objectives, and the prospects for the next period.

2.2.1. Work package 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 work made during the year, have debates, and guarantee the transparency 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 evaluating the efficiency of the organisational devices and of the tools, to share information and make a collaborative work and the publishing devices of the works results.
- Informing the consortium members, and more generally the scientific community that is interested in the project issues.
- 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.

The WP2 manages a Scientific Committee and a general organisational Committee, so as to guarantee the quality of all the CAENTI conferences (see later 2.2.2.4.)

2.2.2 Work package 2 CONFERENCE progress towards objectives

During the second period, CAENTI:

- Organizes the HUELVA conference on October 2007
- Prepares the BESANÇON conference for October 2008 and published the call for papers
- Publishes the acts of HUELVA conference.

2.2.2.1. International Conference of Territorial Intelligence of HUELVA, October, 16th - 17th 2008.

Annual International Conference of Territorial Intelligence of 2007 was entitled “TERRITORIAL INTELLIGENCE AND GOVERNANCE. PARTICIPATIVE RESEARCH-ACTION Y GOVERNANCE APPLIED TO TERRITORIAL DEVELOPMENT.”

This conference was held in HUELVA from 24th to 27th October 2007. It mainly focused on the debate on the topics of WP5 for year 2007 and especially on the participation potentialities and limits and on the difficulties of the implementation of the principles of Multidimensionality, Partnership, Participation, Transformation, Sustainability, Transparency, Co-responsibility and Co-learning in the framework of the territorial research-action activity.

Therefore the conference dealt with three themes which were suggested in the call for papers:

- A. The participative research-action applied to the sustainable territorial development.
- B. Application of the methods and tools of participative research-action to the territorial sustainable development.
- C. Analysis of the participative Research-Action Experiences which are applied to the territorial projects diagnosis, programming, management and evaluation.

Final attendance was 132 participants from 11 countries. 55 communications were submitted and 104 authors took part in the event.

Involved organisers

Organisational Committee in the University of Huelva

Coordinator:

Blanca MIEDES UGARTE, University of Huelva. miedes@uhu.es

University of HUELVA team:

Manuela DE PAZ BAÑEZ, Local Employment Observatory (UHU).
 Dolores REDONDO TORONJO, Local Employment Observatory (UHU).
 María José ASENSIO COTO, Local Employment Observatory (UHU).
 María de la O BARROSO GONZÁLEZ, University of Huelva.
 Celia SÁNCHEZ LÓPEZ, Local Employment Observatory (UHU).
 Olga MINGUEZ MORENO, Local Employment Observatory (UHU).
 Germán PÉREZ MORALES, Local Employment Observatory (UHU).
 Antonio MORENO MORENO, Local Employment Observatory (UHU).
 Víctor M. ROBLES BUSTAMANTE, Local Employment Observatory (UHU).

Margarita FUENTES GARCÍA, Local Employment Observatory (UHU).
 María Isabel FRANCO LIGENFERT, Valdocco Foundation.
 Julia FERNÁNDEZ QUINTANILLA, (ACCEM)
 Estrella GUALDA CABALLERO, Department of Sociology and Social Work (UHU)
 Jesús MONTEAGUDO LOPEZ-MENCHERO, Department of History II (UHU) and International University of Andalucía (UNIA)

Scientific Committee Composition:

President

Moise Ioan ACHIM, University of Alba Iulia, Rumanía.

Coordination Scientific Committee

Jean-Claude DAUMAS, University of Franche-Comté.
 Dolores REDONDO TORONJO, University of Huelva.
 Jean-Jacques GIRARDOT, University of Franche-Comté.
 Mihai PASCARU-PAG, University of Alba Iulia, Rumanía.

Members of the Scientific Committee

François FAVORY, University of Franche-Comté.
 Serge ORMAUX, University of Franche-Comté.
 Luc GRUSON, University of Franche-Comté.
 Blanca MIEDES UGARTE, University of Huelva.
 Manuela DE PAZ BAÑEZ, University of Huelva.
 Guénaël DEVILLET, University of Lieja.
 Bernadette MERENNE-SCHOUMAKER, University of Lieja.
 Serge SCHMITZ, University of Liege.
 Csilla FILO, University of Pécs.
 Zoltan WILHELM, University of Pecs.
 Ioan ILEANA, University of Alba Iulia, Rumanía.
 Natale AMMATURO, University of Salerno.
 Pierre CHAMPOLLION, University of Salerno.
 Yves ALPE, University of Salerno.
 Kristof OSTIR, Scientific Research Centre of the Slovenian Academy of Sciences and Arts.
 Ruey-Ming TSAY, University of Tunghai.
 Julia FERNANDEZ QUINTANILLA, ACCEM.
 Jean-Marie DELVOYE, Observatoire OPTIMA
 Christiane MARECHAL-RULOT, Association INTEGRA Plus.
 Jean-Guy HENCKEL, Association Jardins de Cocagne

Conference Activities and contents:

October, 24th day started with a meeting of the Steering Committee that decided the major orientations of the CAENTI works until the end of the project, in February 2009. Meetings devoted to the CAENTI work packages allowed finalizing the programming of the research activities.

October, the 25th day started with two invited conferences. The first one, “Challenges of World-Wide Governance” by Prof. Dr. Carlos BERZOSA (Rector of the Complutense University of Madrid) and the second one, “Research-Action Applied to Territorial Development” by Dr. Tomás RODRÍGUEZ VILLASANTE (Complutense University of Madrid). The afternoon was dedicated to the CAENTI scientific results, and it ended with the

presentation of the Letter of quality of the territorial research-action that is drafted by the work package 5.

On October, the 26th, the morning was devoted to the communications submitted by the participants. Two debates about participation closed this conference in the afternoon.

In addition to organizational and prospective CAENTI matters, six workshops were developed with the following topics:

- Workshop1: Territorial Intelligence Approaches, whit seven discussed papers.
- Workshop2: Territorial Analysis Tools, with ten discussed papers (two presented orally by their authors and the rest by the moderator)
- Workshop3: Sustainable Territorial Development Studies, whit 16 discussed papers (two presented orally by their authors and the rest by the moderator)
- Workshop4: Reflections on Research Action, whit four discussed papers (two oral presentations)
- Workshop5: Participation and Governance (general issues), with nine discusses papers (two oral communications)
- Workshop6: Participation and Governance (Experiences), with nine discussed papers (all presented by moderator).

The total amount of presented papers was 5. In order to give as much time as possible to the debate, only two oral communications were selected in each workshop, and the moderator summarized the rest of communications, nevertheless the authors had some minutes to make some remarks.

Organizers guaranteed the communication in the three languages in every workshop and all power points appeared in English.

26th afternoon two plenary debates were also celebrated, first called "Universities - Territorial Actors Relationship within the Framework of Research- Action: Potentialities and Limits", moderated by Prof. Dr. Manuela A. De Paz Bañez and second about "New Technologies and Information Treatment within the Framework of Research- Action: Ethical and Organizational Problems" moderated by Dr. C. Masselot. Both were simultaneously translated into Spanish-French and Spanish- English.

During the whole conference, the attendees could visit many posters of different authors and entities, which were exposed in the entry of the Faculty of Business Administration, where the Conference was being held.

At the end of the conference there were gathered satisfaction questionnaire that had been delivered the first day. This questionnaire (ANNEXE) was anonymous and voluntary. Due to the low number of questionnaires delivered by the participants, we haven't realized any analysis of the information obtained.

Pursuance of the debates

The blog Huelva 2007 available in Territorial intelligence Web Site, which covered the conference in real time, remains open until the proceedings publication. There can be found there the scientific presentations, minutes and photos of the events. Visitors of the Blog have the possibility to make comments after each presentation.

2.2.2.2. Call for papers for the International Conference of Territorial Intelligence, BESANÇON, October, 16th - 17th 2008.

The call for paper for the International Conference of Territorial Intelligence, BESANÇON was published on January 31st, 2008, and on the specialised websites.

2.2.2.2.1. General thematic and communications topics

Territorial Intelligence was born within the information society of which it uses technologies and tools. It also shares the concerns of sustainable development of which it pays attention to respect principles, particularly a global approach based on people's current and future needs, partnership and participation. In the knowledge-based society context, territorial intelligence presently emphasizes the link between knowledge production and territorial action, as well as the importance of the human and social capital in the innovation process.

The concept of "Territorial Intelligence" was mainly fed by information and communication sciences and by knowledge management, as a cognitive and organisational process of economics and geography, to analyse the territories structure and dynamic as geographic spaces and as a space of the human communities' project development.

The Territorial Intelligence systems widely mobilize the information technologies to gather, share, analyse and exploit in a cooperative way, and then to diffuse pluri-disciplinary knowledge and multi-sector information. They are data-processing systems that broadly appeal to the geographic information systems, data statistical analysis and projects management and evaluation.

The territorial actors are solicited to suggest projects, to advocate and evaluate the relevance, efficiency and impact, and to implement their principles of global approach, partnership and participation. If methods and scientific tools adapted to these principles are available for the experts, the territorial actors do not have simple, cheap and friendly tools to draft their action projects, then to follow them, observe and evaluate them, whilst respecting the sustainable development principles.

This conference will pay a special attention to these tools, the generic scientific methods that inspire them, and to the links between scientific research activity and territorial action.

The communications are divided according to three themes:

- The Territorial Intelligence tools for and by the sustainable development actors
- The scientific methods and generic tools of analysis of the spatial and territorial information
- The evolution of the Territorial Intelligence concept

A. [Tools] – The tools of Territorial Intelligence for and by actors of sustainable development. Coordination: Jean-Jacques GIRARDOT

This theme aims at presenting research activities and analyses about the design, execution, appropriation and use of territorial intelligence tools, for and by the territorial actors.

It pays interest to the accessibility of the techniques and methods it uses, as to the one of the information contents they use and product, to the appropriation of these techniques and of these contents by the actors, and to the uses the actors make of these tools.

The territorial intelligence tools usually use techniques and methods of space geographic analysis, quantitative and qualitative statistic processing of territorial information, data-processed management of information, communication, projects management and evaluation, to only talk about the main ones, etc.

The pluri-disciplinary and multi-sector character of the information contents is combined with their formal variety (data, indicators, tables, graphs, maps, etc.) to increase their diversity that in exchange implies a rigorous information management (metadata).

The appropriation of these techniques and of these contents implies the actors acquire new skills, thanks to a transfer of expert skills towards the actors and the corollary mutation of the experts' role with a development of the educational function. This transfer is made on the mid-term in the training, but also on the short-term by the projects accompaniment.

The use of these tools within development partnerships and in a participative context concern varied subjects. The information sharing and the data cooperative analysis favour the partnership work. The actors' participation to the indicators choices, to the results interpretation and to the process of projects submission strongly modifies the tools use. The results public restitution, the users' access to the information, their participation to the observation and evaluation activities, more and more imply the tools in the communicational and decision-making process.

This theme will especially values:

- The tools whose use respects the sustainable development principles,
- The analysis of the tools co-construction processes
- The analysis of the experiences linked to EQUAL development partnerships.

B. [Methods] – The scientific methods and the generic tools of spatial observation and of territorial information analysis. Coordination: Serge ORMAUX.

This theme concerns the scientific methods, the research protocols and the generic tools of wide-applicability used to make spatial modelling, to make data processing, to analyse the territorial information and to observe territories.

The Geographic Information Systems (GIS), as well as the Territorial Information Systems (TIS) are particularly concerned within a broad set of methods and tools likely to inspire the professional tools.

The issue of these tools diffusion in the laboratories and during the trainings in humanities and social sciences (HSS), where it remains low and unequal according to the disciplines, is also asked. It refers to the collaboration of the HSS with the nature sciences and with the engineering sciences that usually use these methods.

The emergent questions of territorial information, of scientific and technical information available and accessible to the actors and citizens, of information sharing, of indicators construction, in particular of the indicators of territorial competitiveness, also concern this thematic.

It will especially value the methods, which respect the sustainable development and the democratic governance.

C. [Concept] – The evolution of the "Territorial Intelligence" concept. Coordination: Philippe DUMAS

This theme aims at consolidating the overview of territorial intelligence, confronting the approaches diversity, understanding the concept evaluations, specifying its links with notions and concepts such as economic intelligence, collective intelligence, territory, community, community development, sustainable development, democratic governance.

It also concerns the various existing approaches, as scientific as cultural, at the European and international scale.

A special attention will be paid to the emergent integration of the environmental approach, which balances the importance of the economic, social and cultural approaches.

2.2.2.2.2. Schedule of the call for papers

The communications can be presented in a presentation, a poster or a tools demonstration (in a computer room) form.

The communications propositions should be sent by the means of ConfTool, the tool of online management of the conference, following the procedure available at the following address: <http://www.territorial-intelligence.eu/besancon2008/>

The communication proposals should be sent in the form of a 800- word summary in English (that can be accompanied by a summary in French), indicating at the beginning:

- The title
- The author and his/her professional contact
- The submitted form (presentation, poster or demonstration)
- The concerned theme: A , B or C.

The scientific committee will either accept the submissions as they are, or ask for improvements or suggest a different form.

The scientific committee will be in charge of dividing the presentations in workshops. According to the workshops, the presentations will be either orally presented by the author or synthetically presented by the workshop moderator.

All the accepted communications, in the form of presentation, poster or demonstration will be digitally published when the conference reception will take place. Consequently, the authors will have to provide, in addition to the summary transmitted at the proposition time:

- The text in less than 7 pages and the slides for the presentations
- The poster and an accompaniment text (maximum 4 pages) for the posters
- An accompaniment text (maximum 4 pages) and possibly a poster for the demonstrations.

They will be published in the conference acts (7 pages for the presentations , 4 pages for the posters and demonstrations). It will be possible to complete the texts provided before the conference for communication, according to the debates. The editorial committee of the “International Journal of Territorial Intelligence” will select the best communications.

The communication language is English. All the documents should be provided in English. They could be provided in addition in French and/or in another language so as to favour a better communication. We recommend to draft the « PowerPoint » presentations in two languages, English and French or in the author’s language. The expositions will be authorised in the author’s language if the presentation is composed in English and in the author’s language. All the documents will have to be provided by the author, in all the languages he/she wants, properly written (please do not use online public tools of automatic translation). The conference organization will not provide any translation.

Deadlines to retain

- | | |
|------------------------------------|---|
| January, 31st 08 | Publication of the call for papers |
| April, 30th 08 | Deadline to reply to the call for papers (800 words summary) |
| May-July 08 | Evaluation of submitted communication |

July, 15th 08	Response of the scientific committee to authors
September 1st 08	Deadline to send the selected communications (7 pages maximum) or selected posters
September 08	Evaluation of the modified communications and posters
September 15th 08	Notification to the authors about the modifications requests
September 30th 08	Deadline to receive the modifications Publication of the definitive programme
Oct. 16th-17th 08	INTERNATIONAL CONFERENCE OF TERRITORIAL INTELLIGENCE
November 15th 08	Deadline to submit papers for publication
December 08	Evaluation of the papers for publication
Dec, 31st 08	Acts publication

2.2.2.2.3. Provisional programme

This conference is the sixth annual International Conference of Territorial Intelligence.

It will be the final conference of the Coordination Action of the European Network of Territorial Intelligence, caENTI, which gathers 8 universities and 7 territorial actors, in eight countries, and that is funded under the 6th Framework Programme of Research and Technological Development of the European Union (March 2006 – February 2009). The theme of Tools corresponds to the caENTI general objective that aims at integrating current research projects about tools of territorial intelligence so as to give them a European dimension.

It will put the foundations of a project that will be submitted within the framework of the 7th European research programme. This project is supported by the Université de Franche-Comté and by the CNRS, within the framework of the Institute of Humanities, Social and Environmental sciences Claude Nicolas LEDOUX.

The day that precedes the Conference is traditionnaly devoted to the caENTI management, to the dissemination activities – Conference and Internet portal- and to the research activities organization. This year, it will also be dedicated to the programming of the preparation of the project for the 7th PCRD. It is devoted to the programming of the research activities of the European Network of Territorial Intelligence.

The caENTI scientific results will be globally presented within the conference framework (Thursday, October 16th 2008 at 14 :00). The communications specific to the caENTI work packages and to the coordination groups will be presented within the thematic workshops framework, (general call for communications).

The workshops will be organised into two types.

- In a classic way, with three presentations in each workshop (20 minutes for the presentation, 10 minutes for questions) or

- In a more synthetic form with a thematic presentation by the moderator that underlines the main issues, possibly illustrated by a communication, a brief answering time to the moderators' questions by the authors. This organization aims at giving more importance and time to the debate

It is possible a authors group get organised, so as to suggest conducting a workshop in this latest form.

The plenary sessions will be simultaneously translated. We will make our best to offer supple translation solutions in the workshops. We suggest drafting texts in several languages which will be distributed to the participants during the reception to the conference and preparing the « powerpoint » presentations in English and French.

A regional cultural visit is organised on the Saturday, according to a schedule allowing catching a train to Paris around 17:00.

Wednesday, October 15th

- 09:00** caENTI Steering Committee
- 10:00** General programming of the caENTI final phase
- 11:00** Prospects of the ENTI project (FP7)
- 12:00** Buffet
- 14:00** Editorial Committee (portal, conference, communication)
- 15:00** Programming activities by WP
- 17:00** Programming synthesis
- 18:30** Visit of BESANÇON
- 20:30** Dinner

Thursday, October 16th

- 09:00** Reception
- 09:30** Opening session
- 10:30** Invited conferences: (Tools, methods, concept)
- 12:00** Buffet at the caveau CROUS
- 14:00 – 15:30** The caENTI scientific results
- 16:00 – 17:30** Thematic workshops
- 18:00 - 19:00** Posters and tools presentation (permanently accessible)

Free evening

Friday, October 17th

- 09:00 - 10:30** Thematic workshops
- 11:00 - 12:30** Thematic workshops
- 12:00** Buffet at the caveau CROUS
- 14:00 – 15:30** Thematic workshops
- 16:00** Workshop synthesis
- 17:00** The prospects of the European Network of Territorial Intelligence (ENTI)

Official dinner

Saturday, October 18th

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

12:00 - 14:00 Lunch at the Saline d'Arc-et-Senans

14:00 - 15:30 Visit of the Saline d'Arc et Senans (Return journey for train to PARIS from BESANÇON – departure : 17:04)

2.2.2.2.4. International scientific committee

Coordination scientific committee:

Jean-Claude DAUMAS, professor of contemporary history, deputy director of the MSHE Ledoux USR 3124 CNRS and Université de Franche-Comté, France.

Philippe DUMAS, professor in information and communication sciences, laboratory I3M, "Information, Milieux, Médias, Médiations " EA 3820 of the Université du Sud Toulon Var, France.

François FAVORY, professor of ancient history, directeur de la MSHE Ledoux USR 3124 CNRS and Université de Franche-Comté, France.

Csilla FILO, assistant professor in communication and civilisation, University of Pécs, Hungary.

Jean-Jacques GIRARDOT, lecturer in economics, caENTI scientific coordinator, ThéMA "Théoriser et Modéliser pour Aménager" UMR 6049 CNRS and Université de Franche-Comté, France.

Cyril MASSELOT, lecturer in information and communication science, Laboratory of Semio-Linguistic, Didactic and Computer Science EA 2281 of the Université de Franche-Comté, France.

Blanca MIEDES UGARTE, associate professor of labour economics and active employment policies, University of Huelva, Spain.

Serge ORMAUX, professor of geography, director of the laboratory ThéMA "Théoriser et Modéliser pour Aménager" UMR 6049 CNRS and Université de Franche-Comté, France.

Mihai PASCARU-PAG, lecturer in sociology, University of Alba Iulia, Romania.

Members of the International scientific committee

Luc GRUSON, associated professor of management, ThéMA "Théoriser et Modéliser pour Aménager" UMR 6049 CNRS and Université de Franche-Comté, France.

Manuela DE PAZ BAÑEZ, professor of applied economics, University of Huelva, Spain.

Dolores REDONDO TORONJO, lecturer of applied economics, University of Huelva, Spain.

Guénael DEVILLET, deputy Manager of the SEGEFA, University of Liège, Belgium.

Bernadette MERENNE-SCHOUMAKER, professor of economical geography and didactics of geography, University of Liège, Belgium.

Serge SCHMITZ, doctor in sciences, University of Liège, Belgium.

Zoltan WILHELM, lecturer in geography, University of Pécs, Hungary.

Moise Ioan ACHIM, professor of public services management, University of Alba Iulia, Romania.

Ioan ILEANA, professor of computer science, University of Alba Iulia, Romania.

Natale AMMATURO, professor of general sociology, University of Salerno, Italy.

Pierre CHAMPOLLION, doctor in educational sciences, University of Salerno, Italy.

Yves ALPE, lecturer in sociology, University of Salerno, Italy.

Kristof OSTIR, researcher in the Scientific Research Centre of the Slovenian Academy of Sciences and Arts, Slovenia.

Ruey-Ming TSAY, professor of sociology and vice dean of research and development University of Tunghai, Taiwan.

Julia FERNANDEZ QUINTANILLA, director of the ACCEM, Spain.

Jean-Marie DELVOYE, director of the Network of Observatory Optim@ (Observation, Participation, Territory, Integration, Methods and Action), Belgium.

Christiane MARECHAL-RULOT, director of the Intermunicipal Observatory Intégra, Belgium.

Jean-Guy HENCKEL, director of the Association “Jardins de Cocagne” (Cocagne gardens), France.

Local scientific committee

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

2.2.2.2.5. Organisational committee

Composition

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Responsabilities

Isabelle MOURET : logistical coordination and organisation
 Pascal BÉRIION : workshops organisation
 Marion LANDRÉ : posters exposition
 Amélie BICHET - MINARO: management of the caENTI participants
 Sophie BUI : communication
 Marie GILLET : publications
 Eddy PETIT : digital publishing
 Richard STEPHENSON : Translation and interpreting
 Jérôme VALANCE : Tools demonstration
 Mattieu LATROY : Data processing and video equipment

2.2.2.3. Acts of HUELVA 2007

Authors were asked to send their final papers one month after the conference finalization. A peer review system was organized in order to select the communications to be included in the paper version of the proceedings. Most valuable contributions will be selected to be considered as publishable in the future Journal of Territorial Intelligence.

The acts of HUELVA are joined as deliverable 15.

2.2.3. Work package 2 CONFERENCE deviations from the project work programme

The aim of WP2 is now more ambitious. It initially consisted in the management of the conference and the animation of a scientific committee for the conference. Now WP2 has to constitute a scientific committee for the European Network of Territorial Intelligence that will supervise all the activities of the CAENTI, mainly the final report.

2.2.4. Deliverables of work package 2 CONFERENCE

Del. n°	Deliverable name	WP n°	Date due	Delivery date	Estim. P/M	Used P/M	Lead contractor
14	Acts of the Annual International Conference of Territorial Intelligence HUELVA 2007	2	1	24	4	6,4	UAB
15	Advertisement and call for papers of the Annual International Conference BESANÇON 2008.	2	12	23	3	3,2	UAB
					7	9,6	

2.2.5. List of the work package 2 CONFERENCE next milestones

Next milestone of the WP2 is the International Conference of Territorial Intelligence in BESANÇON on October 2008.

Del. No	Deliverable name	WP n°	Lead participant	Estimated person months	Nature	Dissemination level	Delivery date
16	Acts of the Annual International Conference of Territorial Intelligence BESANÇON 2008.	2	UFC	4	R	PU	36

2.2.6. The prospects of work package 2 CONFERENCE for next period

The prospects of work package 2 for the third period are:

- The drafting of a scientific committee of the European Network of Territorial Intelligence. This committee will lead the scientific evolution of ENTI after the CAENTI.
- The organisation of the next conference in BESANÇON on October and the publishing of its acts.

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

The WP3 main objective is to contribute to the visibility and dissemination of all caENTI activities and results towards the greatest number.

2.3.1. Work package 3 PORTAL objectives and starting point of work

This is the Territorial Intelligence portal (www.territorial-intelligence.eu) vocation, updated and fed in accordance with the decisions of the Steering Committee and under the Editorial Committee authority.

WP3 also provides the caENTI with a protected Extranet (Intra-consortium website) and a cooperative workspace (CooSpace). The Intra-consortium website is reserved to the coordination action participants. It offers a range of services 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.

In October 2007, at the last International Conference of Territorial Intelligence (HUELVA 2007), the Steering Committee decided that the WP3 will also be in charge of all the consortium external communication and of the edition.

Finally, the WP3 will also be in charge of the integration of new Internet services, preparing the final version of the portal.

As a work starting point, 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. The first phase consisted in designing a prototype of a sustainable site for this date. The second phase was devoted to the portal improvement, setting-up new services. Finally, during the last period, the third phase - the general restructuring of the territorial intelligence portal - started an important and deep work.

Regarding the extranet, the Intra-consortium website was worked out and parameterized from March, the 1st to June, the 30th 2006, like it's explained in the report of implementation of the Intra-consortium website (cf. Deliverable D17). The cooperative workspace, CooSpace has been in progress since March 1st, 2006, and evaluated, to be definitively operational before the end of June 2006 (cf. Deliverable D18).

Concerning the **organization of the coordination activities in the WP**, the University de Franche-Comté (UFC, France) is in charge of the general coordination of the portal, the development of Internet services and the communication.

The extranet development task was implemented jointly by UFC and PTE. The animation of the extranet is made by UFC. The extranet requires dedicated time and effort to keep it in good shape. This requires a dedicated team. The Intra-consortium is managed by two extranet managers; the leader of the work package 3 and the leader of contents. This way, the link with the top management, the editorial committee and a good content strategy is ensured.

The definition of the contents digital edition strategy is coordinated by UFC and UNISA in the Editorial Committee witch is also in charge of the evaluation of the portal and tools.

Activities are organized in specific teams witch were reorganized after the *International Conference of Territorial Intelligence, Huelva 2007* to adapt to the present and future needs.

The following researchers are involved in the coordination activities of WP3.

Editorial Committee (Wp3e)

Cyril MASSELOT, UFC, Leader of Wp3

Jean-Jacques GIRARDOT, UFC, caENTI Scientific coordinator, Leader of the WP6

Amélie BICHET-MINARO, UFC, caENTI Manager and Innovation and Dissemination Manager

Eddy PETIT, UFC, Leader of content and Intranet management

Anne PIPONIER, UNISA, Evaluation coordination

Mihai PASCARU-PAG, UAB, Leader of the WP2

Csila FILÓ, PTE, Leader of the WP4

Blanca MIEDES UGARTE, UHU, Leader of the WP5

Phillipe DUMAS, Territorial Intelligence Journal redactor in chief

Communication (Wp3k)

Cyril MASSELOT, UFC, Leader of communication

Isabelle MOURET, UFC

Eddy PETIT, UFC

Sophie BUI, UFC

Contents (Wp3c)

Eddy PETIT, UFC, Leader of contents

Ioan ILEANA, UAB, Publishing of acts

Anne PERETZ, ADAPEI, Events coverage

Maria TEJADA, ACCEM, Events coverage

Amélie MOUTON, OPTIMA, Events coverage

Cristian MATEI, UAB, Events coverage, Video

Iulian JOLDES, UAB, Events coverage, Video

Internet services (WP3I)

Antonio MORENO MORENO, UHU, Leader of programming
 Eddy PETIT, UFC, Intra-consortium management
 Peter ACS, PTE, Coospace management
 Yannick BERTRAND, ULG, Design
 Mattieu LATROY, UFC

2.3.2. Work package 3 PORTAL progress towards objectives

2.3.2.1. Coordination meetings

The editorial committee activity is situated most of the time at distance (with cooperative tools like Coospace and the Intra-consortium); but it is going to increase with the portal now in its editorial phase.

Editorial committee meetings took place on the occasion of meetings organized within caENTI for other WP or in meetings organized by partners. A few coordination meetings also took place in Besançon (UFC, Fr) between the WP3 and the WP1 (one by month in average), especially for the new portal structure validation.

List of meetings in the last period:

- During the WP6 meeting in Madrid (Spain), from 22nd to 24th, March 2007
- During the WP4 meeting in Salerno (Italia), from 9th to 12th, May 2007
- ACCEM in Santa Susana (Spain), from 17th to 19th, May 2007, first organisation of events coverage in the conference of HUELVA 2007
- During the conference "Tic et Territoire" in LYON (France), 13th, June 2007, launch of the though about the Intelligence Territorial review.
- HUELVA 2007 International Conference (Spain), October 2007: Event coverage organization.
- WP2-WP3 meeting in BESANÇON (France), 12th, December 2007: Organization of the publication of acts (configuration of tools) and first organization of the third international conference Besançon 2008.
- WP3 meeting in BESANÇON, from 31st January 2008 to 1st, February 2008: Planning of the questionnaire to evaluate the internal and external communication of the caENTI.
- WP3 meeting in HUELVA, 21st, February 2008: Planning of work for Internet services (Single Sign-On project...)

2.3.2.2. Coospace and other coordination activities

WP3 is of course the main user of Coospace using several forums and publishing a lot of documents.

WP3 also used the WP3 mailing list to organize the event cover in the conference of HUELVA 2007 (on-line video of events, interviews...)

The Intra-consortium was used to upload all final documents in order to make them available to the entire caENTI consortium. WP3 team also used the Wiki application on the Intra-consortium to pursue in a collaborative way the writing of the editorial charter.

The organization of events cover in the conference of HUELVA 2007 (on-line video of events, interviews...) required numerous exchanges at distance.

2.3.2.3. Joint or cross activities with others WP

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

With the WP1: all communication questions (for strategically reasons) and editorial validation.

With the WP2: responsibility to assist the scientific and the organizational committees, with advertisements and call for acts contribution and publication.

The WP3 put in place the communication strategy, is in charge of the edition of acts and their online publication.

With the WP6: preparation of methods and tools on-line publication. WP3 is preparing the final version of the portal with integrated online tools designed by the caENTI (Catalyse Toolkit, see WP6D report).

With the WP4 and WP5 for the on-line publication of states-of-the-art and results.

The cooperative tools like CooSpace and the Intra-consortium website are in the service of the other WP. The WP3 works with them and particularly with the WP's leaders on the definition and on the parameter settings of the necessary services.

2.3.2.4. Coordinated research activities and task worked

Restructuration of the Territorial Intelligence portal (UFC): The Territorial Intelligence portal restructuring intended to make www.territorial-intelligence.eu a reference portal on Territorial Intelligence that puts at the disposal of the different audiences scientific works, editorial contents and services (Tools, links, list of formation in the field of Territorial Intelligence...).

Work on the web portal accessibility (UFC): WP3 launched the work concerning the accessibility of the web portal. Making a Web site accessible can be complex. WP3 started by listing strategies, guidelines, and resources to help make the Web accessible. Web accessibility means that people with disabilities can use the Web. More specifically, Web accessibility means that people with disabilities can perceive, understand, navigate, and interact with the Web, and that they can contribute to the Web. It is essential that the Web be accessible in order to provide equal access and equal opportunity to people with disabilities. An accessible Web can also help people with disabilities more actively participate in society. Indeed, a site on Territorial Intelligence should be accessible.

Editorial activity (UFC): The supply of the Internet portal concerns principally the on-line publishing of the works and results of the caENTI. The portal is also fed with news from the caENTI partners concerning the activity of the actors, the researchers, the caENTI and the watch in the field of the Territorial Intelligence and with monthly editorials.

Huelva 2007 visibility and publication of conferences proceedings (UFC, UHU): The Annual International Territorial Intelligence Conferences aim at widen the visibility of the Territorial Intelligence concept and particularly 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 among researchers and territorial actors. WP3 did its best to promote the HUELVA 2007 conference on the web and in the press. A **dedicated blog** was put in place.

It covered in live the International Conference of Territorial Intelligence. By following this event blog, it was possible to access some of the slides used by speakers during their presentation, access to photos, quotes, the mood of the event... 91 posts were published. The

WP3 made possible the update of the program of Huelva 2007 and of all the information regarding the event in tense stream.

Like in ALBA IULIA (Romania) in 2006, we organised an on-line diffusion of the international conference of Territorial Intelligence in HUELVA (Spain) in October 2007. This activity was led with UAB, in charge of the video transmission. The WP3 improved the diffusion of the conference by the implementation of a **distributed servers system**. A server was making the conferences digitalization in real time and several servers (one in France, one in Romania and one in Taiwan), connected to the first one, broadcasted the video. This system allowed increasing the number of possible visitors at the same time.

Work on the portal editorial charter (UFC): WP3 pursue the work on the redaction of an editorial charter for the caENTI portal in order to attract and to create attractive and readable contents and to keep the site coherent with multiple contributors is in progress.

Catalyse Toolkit (UFC): To make tools that are accessible and useful for actors, Catalyse (WP6s) adapts fundamental methods and generic tools of wide-applicability. WP3 set up the Catalyse blog allowing downloading existing and validated tools.

Territorial Intelligence journal: The brainstorming about the founding of an international scientific journal of Territorial Intelligence, launched in June 2007, came to the constitution of a workgroup on this matter. The work is in progress. The first edition will include the best six contributions of the Fifth Annual International Conference of Territorial Intelligence (Huelva 2007).

Internal Evaluation Report and evolution proposals (Editorial Committee): WP3 published an Internal Evaluation Report of the Territorial Intelligence portal and of the tools that composed it. It gathers the two last Internal Evaluation Report (one every six months) led by Anne PIPONNIER (University of Salerno, external evaluator for the caENTI), covering the period from March 2007 to February 2008.

The evaluation of the Intranet usage by members of the Consortium is made by Peter ACS (PTE) for CooSpace and Eddy PETIT (UFC) for the Intra-consortium. This part is followed by statistics of use of the Territorial Intelligence portal witch are reported by Eddy PETIT.

Use study and needs analysis: launching large scale inquiry (UFC, UNISA): In order to improve the portal's functionalities and the use of its associated tools (collaborative platform CooSpace and Intra-Consortium website) the editorial committee (WP3E) has decided to launch a large scale questionnaire. Prospects were presented in Huelva, (24-27 October 2007).

The main objective of this action is to inquire about the use of ICT tools and of the perception of the new Territorial Intelligence portal in order to have a more precise and detailed view of the needs and communication practices within the caENTI members and to improve the portal device and its effective use.

Intra-consortium website and CooSpace management (UFC and PTE): The Intra-consortium website is the caENTI extranet. At the end of February 2007, we launched an improved version of the Intra-consortium. We use e-groupware , an open source, web-based, collaborative groupware software solution. It is written in PHP and makes use of the MySQL database (See Deliverable D19 for more information)

Sub-activities are, designing the extranet roadmap, accompanying the uses and measuring the extranet use and drafting of guides and policies.

Development of the necessary Internet services (UFC and UHU):

Mailing lists management. We use Mailman, a free software for managing electronic mail discussion. Mailman is integrated with the web, making it easy for users to manage their accounts and for list owners to administer their lists.

Conference management system (ConfTool). It helps to make the management of events easier and much more efficient integrating the submission/review-process as well as the registration of participants and invoicing. The main work in the last period consisted in the conception of guides to help users with the tool.

Newsletter system: After Huelva 2007, we launched a work to set up a newsletter system on the Territorial Intelligence portal. First we did tests and finally chose.

Single Sign-On (SSO) project: 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. A new roadmap was decided after HUELVA 2007. A WP3 coordination meeting took place in HUELVA (Spain) on February, the 21st in order to plan the work.

Implementation of a system of virtual conferences: The idea is to be able to organize virtual conferences in relation with the caENTI thematic and to broadcast them on-line on the territorial intelligence portal.

A WP3 coordination meeting took place in Huelva (Spain) on February, the 21st in order to plan the work. Specification and recommendation will be presented in Besançon, in June during a WP6 meeting.

Put on-line CATALYSE tools based upon an "Inclusion Itinerary Accompaniment File": Since the international conference of HUELVA 2007, the Catalyse toolkit has got along: the software, the methods and the use recommendations evolved. The specifications and the execution in progress of the online version of the tools and accompaniment tools mobilize a dozen of researchers and actors.

After the publication of WP6 results in HUELVA 2007, a space was dedicated to the Catalyse Toolkit (Catalyse blog, <http://www.territorial-intelligence.eu/catalyse/>), to be able on one hand to consult and download the documents, and in the other one to use according to a precise procedure the developed computing tools, in their on-line and standalone versions.

Link and workgroup were established between WP3, WP6i and WP6s. The first tools are available. Next, all documents and tools will be published on the portal. so as to lead to its integration in the portal of territorial intelligence, as well as to a stabilized version of what we call a "Catalyse CMS".

Communication: The main activity regarding internal communication is about marketing the extranet. We actively looked for opportunities where the extranet could assist other activities, or deliver benefits to the organisation. WP3 made an important effort to diffuse documents such *Intranet concept* helping all the members getting aware of this tool potential.

External communication involves ensuring that caENTI activities and Territorial Intelligence notion are known. First, it's about portal indexation for a better visibility. WP3 focused on the creation of a partners' network for exchange of links and logos. It also focused on indexation on others websites: more specifically the regional gateway web-sites (CORDIS Franche-Comté...). It's also about the promotion of activities:

- Valuation of activities through editorial

- Diffusion of caENTI events on scientific websites and agenda (Conftab , Calenda , ISDM, SFIC...)
- Valorisation of the CATALYSE Toolkit with the creation of a blog
- Advertisement of HUELVA 2007 with a blog, diffusion of information in the press, creation of posters
- Advertisement of BESANÇON 2008 with a blog, diffusion of the call for papers, of information in the press, indexation of the event on specialised websites

2.3.2.5. Results

A new Territorial intelligence portal: A new version of the portal was presented to the scientific community and to the general public during the International Conference of Territorial Intelligence (Huelva 2007) in October 2007. In the redesign process, WP3 tried to make the portal a useful tool as well for general public as by the community scientists, journalists or still institutional.

Unlike the former website which was organised around the caENTI, the new portal was established around Territorial Intelligence. In order to accomplish this change, we modified the information architecture which is now composed of 7 sections:

- What's new?
- Projects
- Ongoing research
- Scientific events
- Publications
- Formations
- Tools and links

The new portal allows a presentation more editorial of the information, with an information architecture organized in folders. It's more usable to give access to archives.

The "News and events" feature was improved: The portal allows adding news with a general workflow management. It's now possible to access to all archive.

A new Focus category of content was created (in "What's new" section) allowing to feed the portal with information more often than with editorial (one by month) and in a more complete way than news.

A new information syndication subscription (RSS), 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.

Regarding the navigation, a site map and an internal search engine, essential to support the accessibility of information and documents, were implemented. The transverse circulation was improved and the access to the contents was simplified by combining access modes (textual links, graphics, search engine), by facilitating the identification of links and by working on the relevance of titles. New services such as calendar feature and photos galleries were added.

The architecture of the new portal was designed so as to include the future services that will result from the caENTI works (portal on the caENTI territorial indicators, etc.). The software of contents management ezPublish was chosen to implement this new architecture, because of its configuration and extension possibilities.

Editorial activity: The new version of the portal allows developing the range of the editorial contents proposed by the site. The new portal offers a new content category called

Focus. Three Focus were published, several are in preparation. More than 40 news were published on the portal in three languages.

CAENTI scientific results publishing in the last period: The WP3 published these following deliverables in the documentary base on the portal and inside the Intra-consortium website:

HUELVA 2007: The International Conferences of Territorial Intelligence was covered at direct time through a blog. By accumulating, before, during and after the conference (27 September 2007 – 29 February 2008) the blog received 826 visits with 313 Absolute unique visitors and 4,655 Pageviews (See details in deliverable D20)

Statistics of frequentation and ranking in crawlers: During the period from March 2007 to February 2008 the portal received 15,837 visits with 10,932 absolute unique visitors and 42,927 page viewed.

Regarding ranking in search engine, at the end of February 2008, a research with a meta-search engine (<http://polymeta.com>) with key words “territorial intelligence”, put the portal in the first position in Google, Yahoo, Live Search and Ask (See D20 for more details).

With these results, we can say that the work on the Territorial Intelligence portal indexation worked. The choice of ezPublish as a content management system for the portal was very helpful.

Regarding scientific dissemination we can see that Google Scholar now references the Acts of the International Conference of Territorial Intelligence, ALBA IULIA 2006 in third position with the keywords "territorial intelligence".

2.3.3. Work package 3 PORTAL deviations from the project workprogramme

The delivery of the portal of the territorial intelligence is a deliverable planned for month 36 (in February 2009). The editorial evolution of the portal is a complex process to be realized. That's why the WP3 wanted to start it from now on by restructuring the architecture of the information, preparing this way the future.

The portal of the territorial intelligence that the WP3 presented during HUELVA 2007 is indeed not in its final version but he allows right now enriching the contents by registering more widely the activities connected to the caENTI in the theme of the territorial intelligence.

Daily activities showed that a reorganization of the editorial team is necessary, to be better apprehensive about the transverse field of WP3's services, and to assure the increase in importance of the editorial dynamism necessary for the new portal.

Finally, the structuring of the on-line publication of methods, tools and results of WP4, WP5 and especially WP6, asks an internal coordination (inter WP) which does not seem to have been sufficiently estimated in time and persons.

These dimensions then led to launch a general thought on this reorganization, which saw its outcome during the international conference of HUELVA 2007 (October 2007), and which has been organized for the next period.

2.3.4. List of drafted documents and next work package 3 PORTAL next deliverables

Del. n°	Deliverable name	WP n°	Date due	Delivery date	Estim. P/M	Used P/M	Lead contractor
20	Second periodic portal editorial report	3	24	24	1,5	2,25	UNISA
22	Territorial Intelligence Portal	3	36			15,48	UFC
						17,73	

Draft documents about the new territorial intelligence portal (UFC)
 Project of graphical charter for the new territorial intelligence portal (UFC)
 Draft documents about the Intra-consortium roadmap (UFC)
 Annual report of Coospace usage (PTE)

2.3.5. List of the work package 3 PORTAL next milestones

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

2.3.6. Prospects of the work package 3 PORTAL for next period

The WP3 PORTAL will draft a global communication strategy in relation with the new portal of territorial intelligence. It will integrate all the communication means that are useful to the CAENTI results diffusion, including the annual conference. Besides, it will develop the editorial abilities.

2.4. Work package 4 [FUNDAMENTAL METHODS] The spreading of fundamental methods and research design in territorial information analysis within the Humanities and Social Sciences. Work package leader: Csilla FILO, University of PECS

2.4.1. Work package 4 METHODS objectives, work starting point and organization

The aim of WP4 during this period was to finish the states of the art regarding the concept of territory in the multi-field context of the integrated approach; to select the relevant territorial information on European and national specialized web sites accessible to actors; to promote the relevant methods, the research protocols and the generic tools for spatial analysis and of processing of territorial information within the social sciences and humanities; to select

the indicators of the territories competitiveness and to survey territorial intelligence projects funded by EU and internal information of the DGs of EC concerning territorial intelligence.

As a work starting point, at the end of 2006 the internal groups of WP4 created the state of the arts. Evolving the evaluation of these studies, we started the actual works from it. Proceeding from a wide territory concept we concluded the necessary fundamental methods, shared information and the hierarchy of activities levels to territorial evolution in sustainable development.

Within WP4 there are five groups who independently work and there is a summary and evaluation workgroup. This separate work does not detain the relations of teams. Then, the leaders of each task plans the actual assignments they make, the reports, the works and the coordination actions. Publishing the document, everybody can get this in the Coospace. During this period, the important coordination activity was to determine the relations between the work tasks in WP4 and territorial intelligence.

Eighteen researchers involved in the coordination activities (see management report, deliverable 5 for efforts).

2.4.2. Progress

We will present the synthesis of coordination meetings and cooperative work, then the progress of each coordination group.

2.4.2.1. Coordination meetings and cooperative work

As WP4 is structured into thematic work packages, the coordination meetings and the cooperative work is the most important activity of the work package.

WP had 4 coordinations meetings

2.4.2.1.1. Annual coordination meeting in Salerno May, 11th and 12th 2007

The first important coordination action was the annual meeting of WP4 in Salerno May, 11th and 12th 2007. The detailed program and report of meeting was published in the document: tia070710_wp4_reportmeetingSalerno.doc

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

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

- Coospace and other coordination activities

- Joint or cross activities with others WP
- Coordinated research activities, task worked, participants involved
- Results
- Drafted documents

2.4.2.1.2. Leader meeting in Besancon 8-9 of September 2007

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

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

The aim of this meeting was:

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

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

The presentation described the objectives of WP4. After the five coordination activities was presented with time table and deliverables in 2006 and 2007. Then coordination meetings demonstrated the activities of the work packages. Finally, each group leader presented the works of second year and we discussed the significant details because it needs to clear to our next assignment in 2008. This task would be the Synthesis sub-activity in which we will sum up the five parallel research processes (Wp4s). The last point of meeting was the preparing of next coordination meeting in PECS 2008.

2.1.2.1.4. Coordination meeting in Liege on 16 of February 2008

This coordination meeting aims at:

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

On this meeting the teams leader of WP4 closed the period of separate sub-activities.

2.1.2.1.5. Cooperative work

In the CooSpace more and more documents and presentation are posted. In addition, the members of the work package can see the present bulletin boards, time plans and forums. We present the surface of WP4 on CooSpace.

2.4.1.1. Research coordination group Wp4m “Methods” progress - Group leader Serge ORMAUX (UFC)

Seven researchers of the UFC and ZRC SASU are implied in this coordination group, which 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 better managing their territories. Consequently, the first step of our activities involved a state-of-the-art of the methods types usable within this framework.

We started the state-of-the-art in 2006 and we completed it in 2007. Firstly, we worked about two kinds of methods: methods for analysis and methods for simulation. Secondly, we worked about the information management thanks to a GIS.

The group is organized in a supple way, and many informal contacts took place during this year. Besides, more structured working meetings were organized with the researchers who were solicited by the WP4M leader to deepen some methodological fields. They allowed detailing the expectations, as on the substance and on the form.

The definition of what we call “methods” keeps posing a problem and often cause rather long debates and productive thinking. Lastly, the conference of Salerno gave us the occasion to make a partial balance. We met the leaders of the WPs in Salerno, what allows reporting progress on the groups advancement and understanding the difficulties that are faced by each of them, in particular the WP4T and the WP4I.

Besides, it will be necessary to contemplate a more important coordination with the WP6, which is in charge of “the design and dissemination of territorial intelligence methods and tools accessible to the territorial actors and respectful of the sustainable development ethics”.

This WP activity is located upstream of the WP4 works, and it would be advisable these two WPs work in a retroaction loop way. Indeed, within the WP4, we classified the methods according to a fundamental logic and whilst talking about our representations of territorial actors’ expectations, but it is obvious it would be useful our work could be filtered thanks to the WP6 work.

The works we made during the second reporting period concerned three main themes:

- Interpolation at the service of territorial intelligence
- Interactive cartography
- Observation

About interpolation at the territorial intelligence service, in geography, in economics and in the vast field of territorial intelligence, the information that is available to made maps and spatial models often concern administrative units (collectives, regions,...). The cartography of such data does not pose any problem as it results from the crossing between statistical tables and vectorial images that archive the limits of the filled-in spatial units. In other fields, it is not the case. In the environment field in particular, the information is only available in few measurement points (meteorological stations, contaminants measurement stations) that are far the ones from the others. The cartographic representation mode is the

only valuable one; it consists in superimposing the measurements result on the precise place where they were registered. Nevertheless, with this kind of representations, we do not have any information on what is happening between the observation points. Consequently, interpolation will try to make the spatial area restitution, what creates important difficulties.

Speaking about interactive cartography, cartography is a discipline that evolves simultaneously with the sciences it uses. In a first time, the geometry contributions allowed it representing the physical space with exactness. Then, the statistics allowed the representations of the abstract phenomena, by structuring the information so as to graphically communicate them in an efficient way. Nevertheless, some obstacles remained: a scale determination, the information selection, the visualisation from a particular point of view are choices that should be made by the cartographer and that make a map a fixed *ad hoc* document, which eventually only transmits a part of the information that it could include to valuate a territory situation. Presently, the computer-science and the recent technologies offer new possibilities. They are mainly based on the Geographic Information Systems (GIS) and on the experience of the Exploratory Data Analysis (EDA) or of the Exploratory Spatial Data Analysis (ESDA). Here, the choices do not devolve to the cartographer, that is to say the map designer; they can be made by the map reader, the one who thinks about the geographic space he studies, and who constructs the map he needs as his research hypotheses become more precise and are confirmed. The main characteristics of this cartography, which is necessarily multi-media and interactive, and the possibilities they offer can be presently broadly valorised in the collaborative and pluri-disciplinary studies that are linked to territorial intelligence, as a tool to help thinking and then making a decision.

We recently advanced the most on observation, under the auspices of **Alexandre Moine** and **Marie-Hélène de Sède** who coordinated the draft of a document about **Observation and observatories: towards an interface between reality and knowledge**. Here, we will mainly present a general survey of the conceptual thinking we led.

The observatories development -about territory, sociological phenomena, economics or environment-, is closely related to three phenomena:

- The increasingly large data availability;
- The increasing complexity of the used, arranged and managed actors sets and geographical space;
- The growth of knowledge and the expectations as regards the actions evaluation power.

Thus, from a cognitive point of view, the data availability, coupled to their much easier diffusion thanks to the information made available by the Information and Communication Technologies (ICT), put the observation problems in a context that should be specified.

The cognitive step leads to the knowledge creation, perhaps schematized in the form of a continuum on the reality basis (of which we perceive signals) in order to lead to more than a knowledge, to modelling.

The knowledge acquisition relating to territory, the major objective that prevails over the decision-making can be assimilated to a training operation i.e. a capacity modification to be thought, to represent, to build the study object under the data effect. Research activity in cognitive sciences and data processing suggests the fact that knowledge is the fruit not only of data external to learning, but also of interactions with its environment and finally of tools and internal information with the latter, in particular tools memorials. As underlines Piaget [Piaget, 75] quoted by Noucher [Noucher, 07], *“intelligence is only one more elaborate form of the biological adaptation. Thus, the processes by which learners build their own mental*

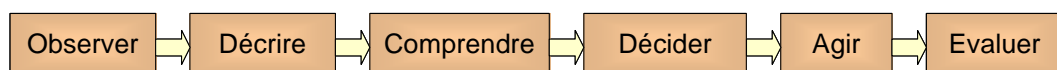
structures are made of interaction with the environment". The observation fits in this knowledge paradigm^[4]. In order to better determine the observation stakes, its relevance within the framework of territorial approaches aiming at the description, the analysis and moreover the decision-making help, it is important to locate it in this continuum. Formally, an observation, considered as a constant attention paid to a subject but also as a "tool of data collection", (National Institute of Telecommunications) is located upstream the process of knowledge generation.

Integrating the signals reception emanating from the real world and the data production, it largely influences the knowledge, because since this first stage it will condition the properties and characters set specific to the data, supplying the decision-making. This evidence however seems very quickly forgotten since the observation projects are formed. In fact, how much they are, decision-makers or more largely in charge of study, technicians, and even researchers to be questioned about this transmutation quality, which makes possible to pass from the felt world to the more formal data's one?

By definition, the observation underlies the description logic. Thereby, in its most current meaning, description consists in gathering the observations made in connection with such or such phenomenon in order to provide a coherent image and as supplement as possible. In fact, within the framework of territorial observatories, it will be a question of representing geographical space in reference to users, developers or managers. Description must lead to a representation as exact as possible of the reality. It is an important phase which proceeds in the observation and prepares for analysis. The quality of the analysis results will depend on the description quality and consequently on the policies implementation or on the implemented management.

However, there is a distortion between observations, such as they are defined and are used by the set of sciences (sociological observation as much as observation of physical or biological phenomena) and the initiated and practiced observation by the territorial actors on the territory object.

- Firstly, this distinction operates on the observation object itself. Whereas the "scientific" observation seems an external step of the object itself, the territorial observation proves to be much more complex, since the "observers" "are also observed". Indeed, many are observatories developed by institutions, local authorities which finally look at themselves, using the changes on the territories, more or less directly initiated!
- In terms of objectives, another distinction is essential. Whereas the scientific observation tends toward a first object decoding in sight of its description, then of its understanding, the territorial observation aims at mutualising the knowledge, providing interpretation keys of complex systems represented by territories. As Christian Estrosi underlines in his short speech of presentation of the DATAR territories observatory (DIACT today), "*By publishing his first report, the territories observatory answers several expectations and in particular the one to better share, from now on, the available knowledge on territories, too often dispersed or only known by specialists*". In this context, it is more a question of knowing for understanding, but especially to know in order to behave, decide, evaluate.



(To observe, to describe, to understand, to decide, to act, to evaluate)

- In terms of methods, presently the observations development does not always respond to the formalized and validated implementation approach. The projects are primarily based on organizational approaches, which objectives consist in supporting the partnerships relating to observation. Then, we can assimilate “the observatory” to an organizational device like a “service study”, divided between various organizations and which objectives consist in regularly producing knowledge on the territory and/or on the interest themes set. In other cases, projects are explicitly based on the placement of a computerized tool, type of shared database, on the base there will be produced a synthetic data set, supporting the territories knowledge. Even though, maybe the observation as it is practiced within instrumented observatories is not assimilated to the information and knowledge creation.

However, in all cases, the objective is to produce together what it would be impossible to produce alone. It is in fact by the integration of multi-source data and multi-sets of themes that the processes and revealing characters of complexity appear. On this point, we can notice the interest of the combination of socio-economic and technical data on the buildings to develop behavioural indicators on the power consumption issue. Another example is the use of a combination of financial data, data on mobility as well as “traditional ” data that characterize the households profile (given of INSEE (National Institute of the Statistics and Economic surveys), which allow to evaluate indicators informing about the cost of the distance for the perish-urban households.

Thus, the observation territories objectives are connected to a certain form of data co-production which mechanisms were identified by Noucher. This “lineage”, between observatory and co-production enables us to specify the conditions favourable to the development of essential participative logics within the framework of such projects (figure 6). As in different socio-cognitive mechanisms, the stake is to understand actors in their cultures and their different professions and often, in their divergent strategies. Thus, the governorship will emerge on the basis of the data and the thinking division on the divided indicators.

2.4.1.2. Research coordination group WP4i “Information” progress. Group leader Guénaél DEVILLET (ULG)

The team Wp4i “Information” of the WP4 is in charge of a comparative inventory of territorial information available on Internet and sources in Europe.

As a work starting point, the group Wp4i made in 2006:

- Research of indicators on national and international statistical websites for “catalyse”, guide for diagnosis and evaluation
- Research of 20 contextual indicators that will be useful for INTEGRA
- Integration between the different groups of WP4 and with the WP6
- Choice of indicators for the portal

In 2007, the Wp4i was involved in these activities:

- Research of indicators on national and international statistical websites for CATALYSE guide for diagnosis and evaluation, as for the file
- Research of indicators suitable for INTEGRA and creation of shape files for INTEGRA experimentation
- Comparison of the selected indicators for the guide and the file CATALYSE and the selected indicators for INTERGRA, as an example.

Wp4i participated to the following internal coordination meetings:

- Coordination meeting in SALERNO of WP4 from 11th to 12th May 2007
- International Conference in HUELVA 23rd to 27th October 2007
- Coordination meeting in LIEGE of WP6 and WP4 from 14th to 16th February 2008

It also had local coordination meeting with OPTIMA and INTEGRA Plus within the framework of WP6: 11/07/07; 12/07/07; 17/07/07; 4/10/07; 5/10/07; 9/10/07; 19/12/07.

The following documents were uploaded on Coospace WP4:

- Correspondence between available indicator on statistical websites and the questions of Catalyse
- Spatial level of indicators for Catalyse

The results of the Wp4i are the following ones:

- Selection of the indicators for CATALYSE Guide and file according to the specifications of the deliverable 57.
- Correspondence between available indicators on statistical websites and the questions of Catalyse at the lowest spatial level
- Updating Research already did for some indicators (research of 2006)
- New research for the others indicators (27 countries)
- Choice of indicators for INTEGRA Plus, as a local example.

2.4.1.3. Research coordination group WP4P “Projects” progress. Group leader Jean-Jacques GIRARDOT (UFC)

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

1. Among the projects that were supported by the European Commission, which of them have an object corresponding to the questionings of the territorial intelligence?
2. Which relevant information for territorial intelligence the General Directions of the European Commission have, in addition to those that are published on the official websites?

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

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

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

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

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

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

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

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

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

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

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

2.4.1.4. Research coordination group Wp4t “Territory” progress. Group leader Pierre CHAMPOLLION (OER/UNISA)

The Wp4t firstly defined two main objectives:

- To elaborate an interdisciplinary definition of the territory concept (from four academic disciplines: education science, geography, ICS and sociology);
- To elaborate an international state-of-the-art about territory based on these four disciplines.

The Wp4t group includes two permanent coordinators who are supported by others members, who especially come from UNISA, OER, UFC and OPTIMA.

The Wp4t first objective was already reached at the end of the first year of work. It was based on a CAENTI internal multidisciplinary state-of-the-art about territory and about the site specification process. It was introduced during the first conference about territorial intelligence of ALBA IULIA (Romania) at the end of September 2006 and definitively presented during the WP4 mid-term internal meeting of Salerno (Italy) at the beginning of May 2007.

Wp4t presently work to reach the second objective. A postgraduate student of the drafted a survey on European research on territory under the supervision of the Wp4t. It is a

European state-of-the-art that includes an international bibliography and a listing of the scientific laboratories which work about the territory issue.

The Wp4t also work on the appropriation of the territory concept by the local actors within the framework of sustainable development. The Wp4t team met with the CAENTI territory actors OPTIMA in SERAING (Belgium) on October 18th-19th 2007. During this meeting, the Wp4t compared its interdisciplinary definition of territory with the real and actual needs of the local actors, so as an operative definition of territory can be elaborated.

During the second conference of territorial intelligence of HUELVA (Spain) on October 24th-26th 2007, the Wp4t leader can not present the first composition of the international state-of-the-art about territory because the health state of the researchers who made the survey on European research about territory don not allow her finishing or giving its partial results to the Wp4t researchers.

Wp4t presented:

- The last state of the internal exchanges about the concept of territory
- The first results of the meeting of SERAING

A report resumed the exchanges about territory between the Wp4t, OER that works about the effect of territory on school and the Belgian social association OPTIMA, which works as actor of territory for the territorial intelligence.

After two meetings, which took place in SERAING (October 2007) and LYON (January 2008) these interdisciplinary exchanges with actors have produced an proposal of operative definition of territory built together by Wp4t, OER and OPTIMA:

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

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

These exchanges with OPTIMA have also produced an scientific paper for the international revue NETCOM (end may 2008). This paper, which has emerged of the collaboration, was already agreed (P. Champollion, J-M Delvoe and A. Piponnier, external evaluator of the WP3). His title is: *Observatoires numériques et pratiques citoyennes : des outils d'intelligence territoriale au service du développement durable ?*

2.4.1.5. Research coordination group WP4C “Competitiveness” progress - Group leader Csilla FILO (PTE)

In 2007, the objectives of the group was to end the state of the art of territorial competitiveness to create the report about the notion of competitiveness of territory. In this term our starting point was the state of the art of territorial competitiveness and our research actions about indicators of territorial competitiveness.

Four researchers and two experts of the universities of Pecs and two territorial actors of BARANYA worked in this coordination group. Everybody contributed and added own practices and expertises. In additional we used the studies of BARANYA county and results of projects.

In this work group the participants and contributors organized the tasks together. Each researcher and experts added the own practices and competences. The research activity of sub - task leader has given PhD degree at University of Pécs. The subject of PhD thesis was the Influencing factors of human resource development in the micro-region of Sellye.

We also were in relation with Blanca MIEDES who is the WP5 leader and she promoted our work some research result and studies. These studies are in the Coospace.

Wp4c organize the next internal meetings :

December, 3rd 2006, PECS University

- Evaluation of coordination actions within wp4 competitiveness
- Evaluation of 1st Annual Conference Alba Iulia
- Evaluation of the state of the art of territorial competitiveness (deliverables)
- Works and news in the Coospace
- Evaluation of indicators of territorial competitiveness on level of national and international
- Define the requirement of notion of territorial competitiveness
- Preparing of Salerno meeting
- Preparing of International Conference TERRITORIAL INTELLIGENCES, REGIONAL IDENTITIES AND SUSTAINABLE DEVELOPMENT Fisciano-Vietri (SA) – May, 9th, 10th and 11th 2007
- Debate of actual publishes
- Discuss of actual research actions

August, 27th 2007

- Short meeting about 2nd Annual International Conference
- Preparing of 2nd Annual International Conference Huelva 2007
- Communications on conference
- Debate of thesis of Sellye regions of human resource development influence factors by Cs. Filo

September, 3rd

- Short meeting about 2nd Annual International Conference
- Preparing of 2nd Annual International Conference Huelva 2007
- New researching actions (Hungarian micro-regions comparative research)
- Preparing the report of WP4 Competitiveness (presentation of 2. A. I. Conference)

September, 28th

- Short meeting about reports of WP4
- Preparing the report of WP4 all (conference presentation of 2. A. I. Conference)
- Intermediate Report of WP4

October, 13th

- Evaluation of final version of intermediate report
- Discussion of conference communication (Cs. Filó: Territorial competitiveness and human factors, Z. Wilhelm: Socio - Economic Structure in Hungary with Special Attention to Southern Great Hungarian Plain Region, P. Ács: Theoretical approach of network communication and collaboration in research)
- Preparing the second coordination meeting (report, prospect and reforming, closing)

November, 26th

- Evaluating of Second Annual International Conference of Territorial Intelligence

December, 12th

- Actualisation of Report about the notion of competitiveness of territory

December, 28th

- Finishing of Report about the notion of competitiveness of territory

January, 4th

- Finishing of Report about the notion of competitiveness of territory

January, 31st

- Preparing of Synthesis

February, 9th

- Preparing of Synthesis
- Coospace and other coordination activities

During this period, we collected the notion of territorial competitiveness. After comparative research actions we define the situation of territorial competitiveness within wp4 and CAENTI. Then, we jointed our results to more sub-tasks within wp4. Our documents we loaded up to Coospace.

The research team of University of Pecs contributed more research project in these years. We are using the methods, tools and protocols of these projects in the CAENTI, therefore we follow with attention the results of WP6.

Wp4c also have started actual research actions within territorial intelligence at University of Pecs:

Comparative research of human resource and labour market problems of small villages

- Specific results

The specific results are drafted into deliverable 32 offers a complete presentation. Starting from the pyramid model we defined indicators systems which consist of 30 indicators. With this we are typing the gradations of competitiveness of Hungarian micro-regions. After we compared this system with European level and we integrated these to our activity.

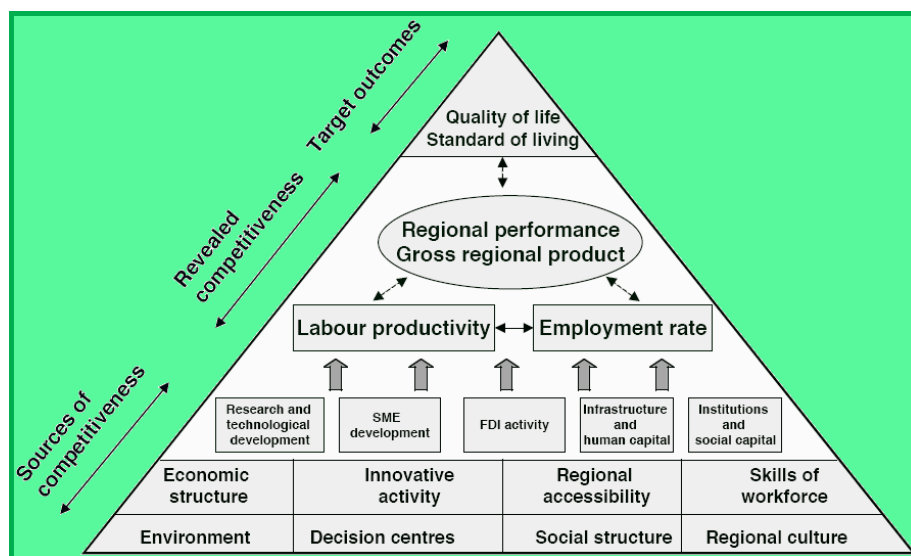


Diagram 4: Pyramid model

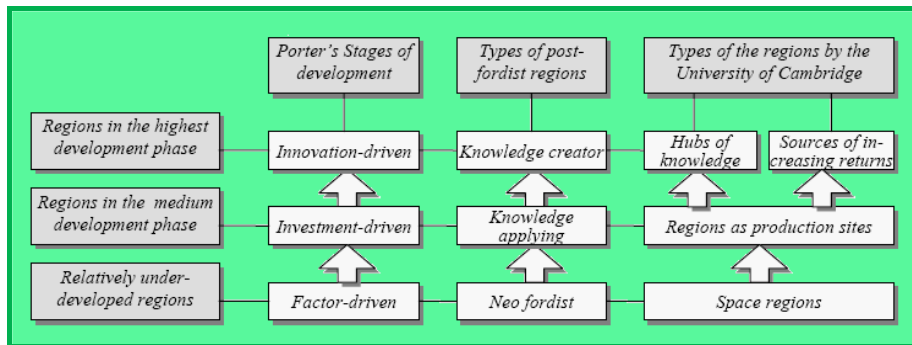


Diagram 5: Comparison of model competitiveness (Hungarian Universities and University of Cambridge)

Wp4c also drafted internal documents:

Filó, Cs – Wilhelm, Z. – Kékkő, O : Indicators of territorial competitiveness

Filó Cs.: Territorial competitiveness and human factors (study)

2.4.3. Work package 4 METHODS deviation from the project workprogramme

Out of the problem we mentioned previously about the survey on territorial intelligence research in Europe, the WP4 did not deviate from the project workprogram. We follow the time table and deadline of deliverables. Although in the WP4 Project sub-activity we required more comparability relevant EC projects and DG's information but regarding our criteria the EC did not support project of this kind.

2.4.4. List of deliverables of work package 4 METHODS

Drafted documents were indicated with the progress of each coordination group.

Del. n°	Deliverable name	WP n°	Date due	Delivery date	Estim. P/M	Used P/M	Lead contractor
28	Inventory of fundamental methods and tools of spatial analysis and of processing of territorial information within the social sciences and humanities in Europe.	4	22	22	6	5,85	UFC
29	Reasoned catalogue of territorial information available on internet and sources in Europe.	4	22	22	5	4,26	ULG
30	Report of evaluation on EC relevant projects and DG's information.	4	22	22	7	2	UFC
31	Report about the concept of territory and the process of "territorialisation".	4	22	22	5	3	UNISA
32	Report about the notion of competitiveness of territory.	4	22	22	6	4,2	PTE
					29	19,31	PTE

2.4.5. List of work package 4 METHODS next deliverables and milestones

Del. No	Deliverable name	WP n°	Lead participant	Estimated person months	Nature	Dissemination level	Delivery date
33	Final scientific report of synthesis on territorial intelligence.	4	PTE	8	R	PU	36

Coordination meeting of the leaders of work packages and coordination group (BESANÇON, April 2008) to discuss the convergence of the work packages and shared the tasks with a new programme.

Coordination meeting of the WP4 in PECS, end May 2008

International Conference of Territorial Intelligence, BESANÇON, October 2008.

2.4.6. The work package 4 METHODS global prospects for next periods

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

It will end the following tasks the thematic coordination groups have started and liked at deepening more:

- The work started by Wp4m in 2006 about the geographic information systems.

- The European state of art about the concept of territory that SALERNO began this state of the art will include an international bibliography and a listing of European laboratories which are working about territory.

It will plan connections:

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

The research coordination group Wp4s “Synthesis” will aim at drafting the final scientific report of synthesis on territorial intelligence from the states of the arts the separate coordination groups have established. Wp4s started on 1 of January 2008. Firstly, the main task in this group is to evaluate the complete documents of WP4 and after harmonizing the research activities between universities.

A first coordination meeting in Liege on 16 of February 2008 planned the activities of Wp4s for the year 2008.

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

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

2.5.1. Work package 5 GOVERNANCE objectives and work starting point

Main general **objective** of CENTI WP5, *Analysis of the application of the governance principles of sustainable development to territorial research-action*, consists on deliberating on ethical and methodological principles that should be respected by research protocols of social and human sciences, so that the results of research favour territorial governance and therefore the sustainable development of territories.

Main deliverable of this work during the period March 2007, 1st to February 2008, 29th has been the elaboration of a *European quality letter of research favouring territorial governance of sustainable development*.

During the following period (March 2008, 1st to February 2009, 28th) the practical aspects of the application of the principles of the quality letter will be focused, in particular those regarding the use of information and communication technologies in the research processes performed in the framework of WP6.

The **work starting point** of CAENTI-WP5 (*Analysis of the application of the governance principles of sustainable development to territorial research-action*) in this period (March 2007, 1st to February 2008, 29th) is the elaboration of the final document,

Application of the governance principles of sustainable development to territorial research-action (Deliverable 40, published on CAENTI Website) as the result of the wp5 performance during the first year of implementation of the CAENTI Project (from March 2006 to February 2007).

During the first phase the group had set itself the objective of performing an analysis of the research experience of the members who make up CAENTI and, based on the assessment of the results of this experience, to discuss which principles are to inspire the practices of the research activity so that this will really contribute to the development of governance.

In order to contextualise this debate, the group set itself the initial objective of reaching a consensus on a basic conceptual framework on the ideas of territorial governance, sustainable development, territorial intelligence and, given the importance of this approach for all the participants, on the concept of *action-research*. Based on the conclusions of this initial work, during the period March 2007 to February 2008 the discussion has been entered into in greater depth and the drawing up of action-research protocols inspired by these principles have been undertaken. The result of this debate has been the *CAENTI Quality Letter on Action-Research Favouring Territorial Governance of Sustainable Development* (Public Deliverable number 47)

Concerning the **organization** of the coordination activities in the WP, during the reported period main objective of CAENTI-WP5 has been the elaboration of the quality letter. It establishes ethical principles and methodological recommendations for action- research processes likely to guarantee the respect to the principles of governance of sustainable development.

First planning of the coordination activities for the whole period, work methodology and work groups had been discussed and agreed in the meeting in Liège in January, the 19th and 20th 2007.

January, 20th to 31st: organization of the work teams.

February, 1st to March, 31st: teams discussions.

April, 1st to 12th: Preparation of WP5 Scientific Coordination Meeting in Madrid.

April, 13th and 14th: Wp5 Scientific Coordination Meeting in Madrid.

April, 15th to May, 31st: end of draft reports of each group (drafts of deliverables D41-D46).

June, 1st to September, 31st: redaction of the proposal of “letter of quality” (small group, five researchers and two actors).

October, 24th-27th: presentation of the proposal of “letter of quality” in the **Second international annual conference of territorial intelligence “TERRITORIAL INTELLIGENCE AND GOVERNANCE. PARTICIPATORY RESEARCH-ACTION AND TERRITORIAL DEVELOPMENT**. In this meeting was planned to hold an internal discussion (CAENTI members) and external (rest of scientific community and territorial actors attending the conference) debate about the contents of the proposal.

November, 1st to 31st: Process of internal validation of Quality Letter.

December, 1st to 20th: preparation of final 2007 deliverables.

In the meeting in Liège the group team agreed in forming three-member work-groups. The task these small groups had to deal with was to define and to go deeper on the discussion about the ethical and methodological principles which must be respected in the

action-research processes in order to foster territorial governance. These groups ought to have presented their provisional conclusions in Madrid meeting in April.

UHU ULG OPTIMA	UFC UHU VALDOCCO	UAB UNISA COCAGNE
PTE UFC ADAPEI	ULG UAB INTEGRA+	UNISA PTE BARANYA
ACCEM + ONE MEMBER FOR TEMM: ELABORATION OF THE QUALITY LETTER		

As it was explained in the third intermediate report (March 2007, 1st to August 2007, 31st), unfortunately the former described dynamic did not worked and the group needed to define a new methodology. The solution was to celebrate these group discussions in Madrid and try to get together the principal elements that ought to be included in CAENTI Action-Research Quality Letter.

These changes implied that, after a discussion in Madrid involving a large number of participants, a small group was working in the elaboration of a proposal of Letter of Quality just to submit it to debate in Huelva (internal and external).

This small group was integrated by Laurent AMIOTTE-SCHUSETT (UFC) and Blanca MIEDES-UGARTE (UHU) who were advised by the territorial actors' representatives María Isabel FANCO-LIGENFERT (VALDOCCO), Julia FERNÁNDEZ-QUINTANILLA (ACCEM).

A new WP5 scientific coordination meeting which have not been initially planned was held in Huelva 27th to 28th of September. This meeting was celebrated taking advance of the fact that many WP5 members were summoned to the Scientific Committee meeting organized in Huelva in order to review the last preparations of the CAENTI Second International Conference in October.

Four universities and two territorial actors attended this meeting and discussed and made their comments and suggestions to the small group's draft in order to improve it to be presented in the Conference as a CAENTI proposal of Action-Research Quality Letter.

The proposal of the Quality Letter was discussed in the International Conference in Huelva by researchers and territorial actors, either member or not members of CAENTI (see results of this discussion below).

In the WP5 coordination meeting celebrated on October, 24th 2007, next steps in the elaboration of the final version of the quality letter were decided. After the Conference six work-groups led by the six European universities involved in WP5 should work, in collaboration with the territorial actors their usually work, on evaluating their research-actions process (mainly those included in 2006 Catalogue) considering the criteria and principles included in the Quality Letter. They should write in their reports (D41 to 46) the conclusion about this evaluation process.

The Deliverable 47: "CAENTI European Quality Letter of Action Research Favoring Territorial Governance of Sustainable Development" is the result of all this participative debate.

WP5 is made up of a multidisciplinary and multi-sectorial single working group with participating representatives from six universities (Alba Iulia University, Franche-Comté

University, Huelva University, Liège University, Pécs University, Salerno University) and CAENTI's seven territorial actors (VALDOCCO, ACCEM, OPTIMA, INTEGRA+, APAPEI, COCAGNE, BARANYA COUNTY).

2.5.2. Work package 5 GOVERNANCE progress towards objectives

The first coordination meeting of this period is WP5 scientific coordination meeting that was held in Madrid April 2007, 13th and 14th in ACCEM offices in Madrid. This meeting had the objective of coordinating the elaboration of the proposal of the quality letter.

The departing point in Madrid will be the principles we have yet agreed in Liège: Multidimensionality, Partnership, Participation, Transformation, Sustainability, Transparency, Co-responsibility, Co-learning.

The work the group dealt with in Madrid consisted of:

1. Completing the list of principles and in defining them in a more precise way.
2. Analysing main implications of their application in real research-action projects (including the possible adverse effects) on:
 - a. Research-action topics to be selected
 - b. Methodologies: main characteristics
 - c Pursued Results: social and scientific impact pursued.
 - d. Use, diffusion and transfer results systems
 - e. Actors' and researchers' role in research-action processes (relationships and responsibilities).
3. As the implementation of these principles is very complex we wanted to specify the methods and **research-action protocols** that can facilitated its application.

The results of this discussion made up the elements for the elaboration of the *European quality letter of research-action favouring the territorial governance of sustainable development*.

Participants in Madrid meeting did a brief presentation summing up their ideas regarding points 1, 2 and 3. The objective of this presentation was to promote a brainstorming session. Each team included in their presentation the elements they consider more interesting or more necessary to be included in the Quality Letter. Main aspects discussed in these sessions were:

- Research-Action Principles:

Regarding the principles they were definitively enunciate as follows:

1. Transformation: it is an implicit principle in the research-action concept; it consists in fostering the transformer role that research can performed on social reality. Social needs as departing point.
2. Multidimensionality: focussing research object using a multidimensional and multisectorial well balanced approach.
3. Partnership: fostering and involving territorial partnerships in the research-action processes.
4. Participation: assuring that territorial actors' participation (those who are directly confronted with territorial problems) is carried out in an effective way.
5. Sustainability: it consists in carrying out long term research processes which are needed to obtain a more evolutionary knowledge in order to generate sustainable territorial development dynamics.

6. Transparency: the research-action processes must lead to a higher transparency of the results regarding to both knowledge and policies, facilitating and democratizing the processes of decisions making.
7. Co-responsibility: the component “action” and the component “research” are equally responsible for the evolution of the process.
8. Co-learning: the research-action processes must facilitate the cooperative learning of all the participants, improving the capacity of the territorial system to look for solutions to the future problems keeping in mind their past experience. In other words, they ought to strengthen the development of the territorial intelligence.

- Concept of a “Quality Letter” :

The group also agreed that we will focus the elaboration of the Quality Letter by means of drawing up a common set of principles inspiring “better practices” FOR FOSTER TERRITORIAL GOUVERNANCE THOROUGH ACTION-RESEARCH. The aim is that this letter can become a referential point for researchers and actors who are involved in a research-action processes related to territorial development.

- Concept of “Quality” in this context:

The group concluded that there are two main aspects when considering “quality” regarding research-action processes applied to territorial development:

- Their results (both scientific and political) must lead to a better understanding of the territorial dynamics and they must enable more adapted solutions to territorial needs.
- The processes of research-action must help to develop territorial research and action capabilities by creating, improving and mobilizing actors and researchers competences.

Both aspects are very important in favoring territorial actor’s empowerment which is the bases for really sustainable territorial development in a knowledge based society.

- Content of the Quality letter:

As result of the debate actors decide the following document structure:

- Context (Aims, theoretical foundations, political implications)
- Method (how has it been established, validation process)
- Guidelines: recommendations, instructions, directions, suggestions, advices; regulations, rules, principles, guiding principles; standards, criterions; procedures... Each of them followed by a short justification-explanation. Topics to be included in this guide lines will be ethical and technical and it will be expressed in terms of principles and protocols. They will include references to the following issues: research-action topics, methodologies, pursued results, diffusion and transfer results systems, actors’ and researchers’ role in research-action processes.

Regarding Legitimacy of CAENTI-WP5 to define a “Quality letter” the group considered that it is justified on the basis of the wide experience in research-action processes which had been compiled in the Catalogue of experiences (Deliverable 40).

Other Elements to be considered: in this point the group gathered some elements regarding particular aspects of CAENTI action research processes that would be useful to

elaborate the quality letter: territorial focus (actors' needs); multidimensionality (sectors, disciplines); mix qualitative and quantitative analysis (methodological rigorousness); TICs more than a single mean, central tools; territorial pedagogy and mobilization of territorial actors' competences; long term projects; participation must involve all levels *not only institutional heads*; balanced relationship researchers-actors; particular aspects of CAENTI research action processes: tray to answer questions as *Action-Research, for what and how?* For CAENTI partners in Action-Research the GOAL is the PROCESS.

The group also considered that the points of the quality letter should be completed with some reflections about the added value of each of them and a special remark about the role that technologies of information and communication can play to foster them.

Departing from all this elements a small group of researchers and territorial actors (UFC, UHU, VALDOCCO and ACCEM) were in charge of the elaboration of a draft of the quality letter to be presented in Huelva Conference.

This draft was debated in the coordination meeting which was held in Huelva 27th and 28th September.

Most important concept arose in these meeting was “Durable collaborative participation”. The group reasserted the concept of quality to be worked out from the point of view of both the results and the process.

On the one hand, from the point of view of the results, the project quality would rest on two complementary aspects. First, the action-research project ability to generate knowledge of territorial dynamics (theories, models, indicators) better adapted to the actual conditions, and its ability to develop research methods that are more suitable for the characteristics and dynamics of the studied object. Second, on the same level of importance, quality would be related to the action-research project ability to generate a more suitable territorial action facing the real needs of the population.

On the other hand, from the point of view of the process, the project quality would be found in its ability to generate a permanent learning and co-learning environment to guarantee mobilisation and mutualisation of competences among the territorial actors involved in the territorial development processes (included the research teams and, of course, the population itself) on the long term, which could be translated into territorial intelligence development. This exchange refers to the researchers making their knowledge (included analysis tools) more accessible to territorial actors and the latter sharing with the former their proximity knowledge, but also, it mainly implies the joint production of both theoretical and applied new knowledge.

In other words, from the procedural perspective the key factor defining quality in an action-research project is their participants' ability to construct a “durable collaborative participation”.

Focusing on this fact, the WP5 work group agreed on what they think are the four pillars supporting the quality of the action-research aimed at promoting sustainable territorial governance and development. These pillars took the previous principles as their basis, and can be summarized as follows:

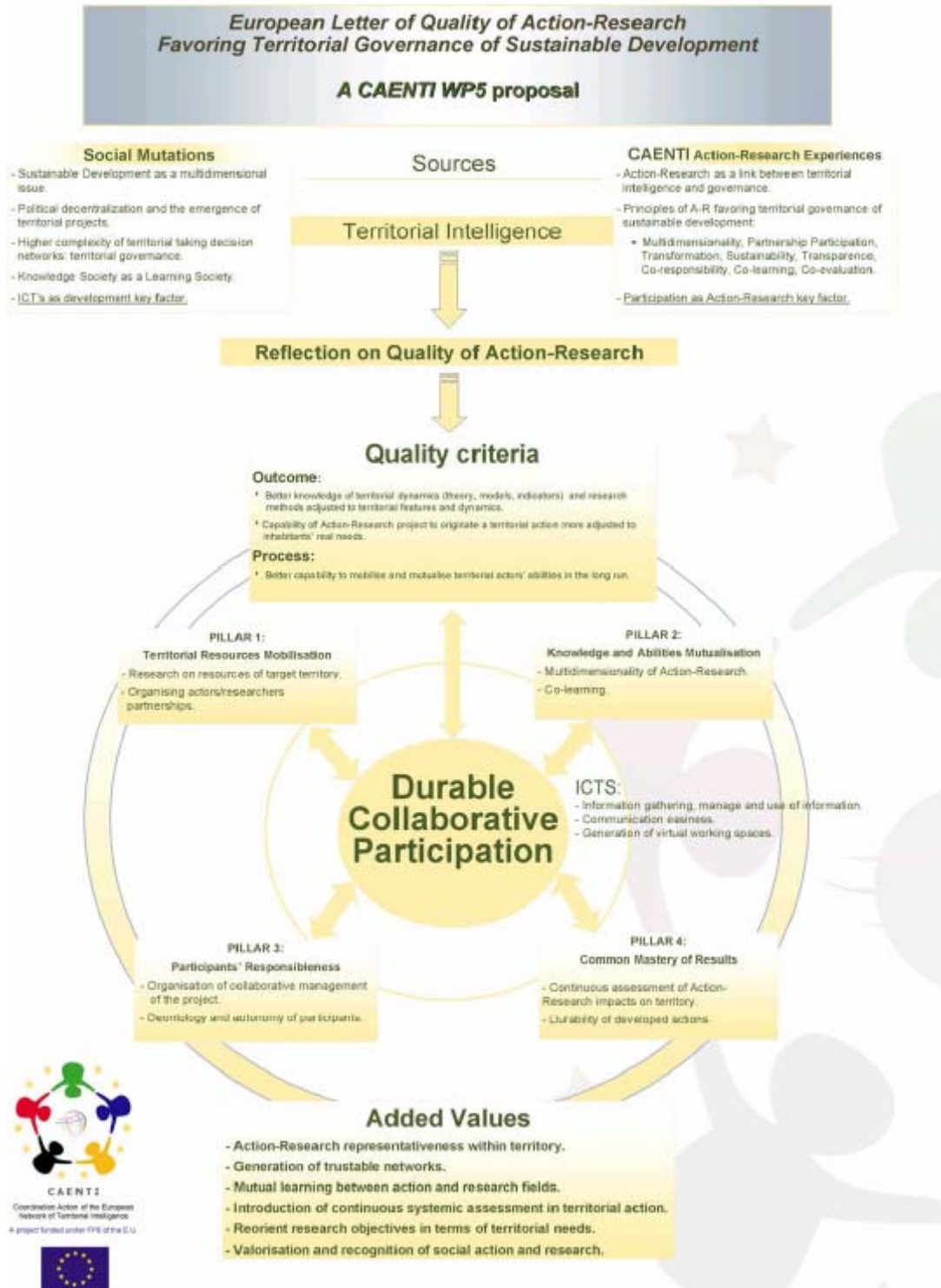
1. Mobilisation of a territory's resources.
2. Mutualisation of knowledge and competences.
3. Responsibility of all the participants.
4. Common property of the results.

In this way, the proposal of the Letter of Quality finally presented to general discussion in a plenary session during the Conference in October 2007, 25th “Proposal of an European letter of Quality on Action-Research Favouring Territorial Governance of Sustainable Development”, included all this reflections declining a couple of objectives to be achieved for each of these four pillars and a number of recommended activities (or means) to help achieve them.

The added values that are thought to justify the choice of the defined objectives and the means to be implemented were also included in the proposal: the increasing of the Action-Research representativeness within territory, the generation of trustable networks, the mutual learning between action and research fields, the introduction of continuous systemic assessment in territorial action; the reorientation of research objectives in terms of territorial needs, the valorisation and recognition of social action and research.

The Quality Letter also emphasizes determining role that Information and Communication Technologies play in the fostering of quality in a participatory territorial action-research project. The new technologies open new possibilities which are still underdeveloped in terms of collaborative project drawing, especially due to the relationship process they imply.

The way in which each of these pillars contributes to the construction of the effective participative collaboration in the long term is summed up in the next figure.



The proposal of Quality Letter was complemented with a tool for assessing the quality letter of a particular project. It was shown during the Conference and I was available for the participants in the CAENTI Portal in Internet.

The e-tool consisted in defining for each of the objectives of the four pillars of the quality letter three possible states of accomplishment of the targets. It was attributed to each

of them a value of 1 to 3. The evaluators are asked to click in each case the situation most likely to that of the evaluated action-research (a response by target). At the end, evaluators get a polar diagram which shows the distance of the outcome of the evaluated project with the ideal type of action-research project.

The tool is just an idea on which WP5 participants are going on working. The initial states of accomplishment of the targets are not yet precisely defined and the scale 1 to 3 are not fine enough. However, the tool has the virtue of being fairly easy to use and very graphic at the time of presenting the results. However, for it to become scientifically worthy it is needed a better definition of the possible scenarios and to refine the assigned punctuations to each state, for example by pondering objectives, increasing the number of possibilities and allowing multiple answers assigning them different values.

The general debate about the Quality Letter during the Conference was focused more in the process of evaluation of the quality than in the defined “content” of this quality. There were not substantial observations regarding the four pillars, but it was discussed the necessity of including a larger development on the quality of results, especially those related to more scientific aspects of the action-research projects. During the session also arose the question of the subject of the evaluation, who is going to be the evaluators of the quality? Are they external or internal? The redactors of the proposal had implicitly assumed that it was an instrument for internal use, a sort of guide to be used for action-research teams who wanted to promote the quality of their interventions, but it was not explicitly expressed on the text. In fact, the CAENTI quality letter is more a list of recommendations to improve quality than a genuine evaluation tool. It sketches an ideal process of participation in an action research process and the idea is to find a way to evaluate how far the actual projects are from this ideal type. It does not pretend to become a tool for institutional not contextualized evaluations, but a practical tool for the long life learning of the participants of the project.

Nevertheless, a better definition of the subjects and procedures of the quality evaluation was strongly recommended. The inclusion of timing and indicators was also suggested in order to improve the proposal.

Another relevant issue was the capability of this quality letter to be adapted to the heterogeneity of action-research projects. The response to this objection is that this Quality Letter is based on real experiences of CAENTI members which are heterogeneous themselves and that the proposal can embrace a very large type of territorial action-research projects, but, of course, it has to be adapted by action-research teams to each circumstance.

In order to go deeper in this criticism in Huelva was decided that the task that each partner might deal with until the end of the period will consist in doing a more deeper “Revision-Evaluation -Validation” of the proposal of the quality letter which was presented during the conference.

The plan was that each university organized a discussion (in a real meeting or in Coospace) with nearest territorial actors about this “Proposal of a European Letter of Quality on Action-Research Favouring Territorial Governance of Sustainable Development”.

In order to make the work as operative as possible, the work teams were made up by researches and territorial actors using a proximity criterion:

UFC + ADAPEI + COCAGNE
UHU + VALDOCCO + ACCEM
ULG + OPTIMA + INTEGRA
UNISA + 2 or 3 territorial actors with whom they usually work.
PTE + BARANYA + 1 territorial actors with whom they usually work.
UAB + 2 or 3 territorial actors with whom they usually work.

This organization should allow the group to have internal and external criticisms on the document.

In addition to this, after the conference, taking as departing point the e-tool linked to the Quality Letter, Laurent AMIOTTE-SUCHET (UFC) and Blanca MIEDES (UHU) were working in an “internal-reflection-grill” in order to construct an instrument action-research teams who are interested in the reflexion about the construction of durable action-research partnership. The work teams were asked to review and complete this instrument so that it can be updated it in the web-site. They were aware the tool is just an internal guide and not an external assessment instrument and people whom it is addressed are the members of teams who are carrying out action-research process. The objective of the grill is it can be jointly fulfilled by the participant of the action-research group in an auto-assessment process.

Each university was responsible of the organization of they own debate and of the writing of a report (Deliverables 41-46) with the following structure:

1. Description of the validation process (if it was held in a seminar, if it was a on-line discussion, email, etc) and description of the participants (who takes part in the debate).
2. Deliberations Results.
 - Revision of the “context” section of the Quality Letter.
 - Remarks about pillars, objectives, and means.
 - Remarks about the proposal of *internal-reflection-grill*.
 - Validation of the Quality-letter.
3. Applicability of the quality letter to the experiences which were described by each university in their experiences catalogue (or to any other action-research experience in which the territorial actors has been involved).

The results of these debates can be read in their corresponding Deliverables (41 to 46). In general, although the conclusions of the debates brought about suggesting and interesting comments they were mainly address to formal and not to the grounds of the Quality Letter. In general it can be said that I was validated by the groups although with some heterogeneous specifics remarks (see Deliverables 41 to 46).

Most enlightening remarks, jointly with meaning comments of the discussion during the conference, have been incorporated to the definitive version of the Quality Letter (Deliverable 47).

In the first phase the work of this group has been more based in direct contacts by email. The reason is that in the preparation of the proposal of letter of quality has been involved a small group of researches and in this case email is a more direct way of interaction.

In the second phase, after the conference, it has been created a new Scene in Coospace named “Quality Letter of Action-Research favouring territorial sustainable development governance”. Its objective was the sharing of main documents regarding the Quality Letter discussion. The workgroups have been led by the Universities of Liège, Huelva, Fanche-Comté, Pécs, Salerno and Alba Iulia and the documents resulting from their discussions have been also uploaded.

During this phase the work of CAENTI-WP5 has been completely link to the preparation of the Second Annual International Conference of Territorial Intelligence that is entitled TERRITORIAL INTELLIGENCE AND GOVERNANCE. PARTICIPATIVE RESEARCH-ACTION Y GOBERNANZATHAT IS APPLIED TO TERRITORIAL DEVELOPMENT. This conference is going to be held in Huelva from 24th to 27th October 2007. It focuses on the discussion on the topics of WP5 for this year and especially on the participation potentialities and limits and on the difficulties of the implementation of the principles of Multidimensionality, Partnership, Participation, Transformation, Sustainability, Transparency, Co-responsibility and Co-learning in the framework of the territorial research-action activity.

The specific thematic areas of the conference are:

- A.** The participative research-action that is applied to the sustainable territorial development.
 - Participative research-action activity vs. Conventional research activity.
 - Analysis and implementation of the principles which sustain the territorial research-action activity: sustainability, multidimensionality, partnership, participation...
 - Participative research-action and territorial governance.
- B.** Application of the methods and tools of participative research-action to the sustainable territorial development.
 - Participative methods for the territorial research-action: potentialities and limits.
 - Instruments and tools that are based on the information and communication technologies and applied to the participative research-action on the sustainable territorial development: potentialities and limits.
- C.** Analysis of Participative Research-Action Experiences which are applied to territorial projects diagnosis, programming, management and evaluation
 - Analytical texts that based on concrete experiences that allow drawing conclusions about the efficiency of the used participative methodologies, as from the knowledge generation point of view as from the solving of the defined problematic one will be privileged.

Most of the group involve in the elaboration of the proposal of the letter of quality is involved in the scientific and technical organization of the conference. The WP5-Leader is the responsible of the local team organizing this conference and several members of this work group are involved in the local scientific committee (see part 2.2.2.1.)

The WP5 activity in this period has resulted in the elaboration of the final version of the Deliverable 40 Application of the governance principles of sustainable development to territorial research-action and the drawing up of five working documents presented at the Madrid scientific coordination meeting that are available in Coospace.

The group has reviewed more than fifty communication regarding the areas of “territorial development studies”, “participation and governance” and “reflections about research action” submitted to the II International Annual Conference.

Internal Deliverables 41 to 46 and Public Deliverable 47: “CAENTI European Quality Letter of Action research Favouring Territorial Governance of Sustainable Development”, are main results of this period.

To sum up, main result of this period is the consensus about the parameters which define a genuine process of action-research applied to sustainable territorial development.

2.5.3. Work package 5 GOVERNANCE deviations from the project workprogramme.

As it was explained in the third report, changes in the workprogramme during this period involved methodology but they had no consequences (lack of quality or delays) regarding the final products of the WP5.

However, due to the necessity of integrate the whole CAENTI project in particular the WP5 with the WP6u and the WP6s its preview that the Deliverables 48 and 49 to be ready the month 32 (to be presented in the conference of Besançon) in spite of month 28 as it was initially preview. Main reason of this is that due to agenda circumstances the WP5 scientific coordination meeting for this period will be in Huelva in June 2008 (month 28), thus it seems coherent that the discussions and debates in this meeting can modify some aspects of the catalogues drafts. The group will need more time in order to incorporate the conclusions of this debate. As the target is to present the catalogues in Besançon Conference the delay does not change main WP5 objectives for this period.

2.5.4. List of drafted documents and next deliverables of work package 5 GOVERNANCE

Deliverables for the current period are:

Del. n°	Deliverable name	WP n°	Date due	Delivery date	Estim. P/M	Used P/M	Lead contractor
41	Report on evaluation conclusions UFC	5	22	22	1,5	1	UFC
42	Report on evaluation conclusions UHU	5	22	22	1,5	1,5	UHU
43	Report on evaluation conclusions ULG	5	22	22	1,5	1,37	ULG
44	Report on evaluation conclusions PTE.	5	22	22	1,5	0,4	PTE
45	Report on evaluation conclusions UAB.	5	22	22	1,5	1	UAB
46	Report on evaluation conclusions UNISA.	5	22	22	1,5	1	UNISA
47	Letter of quality. Research evaluation for territorial intelligence.	5	22	22	7,5	6,2	UHU
					16,5	12,47	

Other drafted documents :

It has been produced a preliminary draft of the European quality letter of research favouring territorial governance of sustainable development.

The poster “European Letter of Quality of Action-Research Favoring Territorial Governance of Sustainable Development”.

The internal-thinking-grid for action-research teams.

The document “Quality Letter Timing Indicators” written by Orsolya Kékkő of University of Pécs.

The drafts of SALERNO and LIEGE deliverables.

2.5.5. List of work package 5 GOVERNANCE next milestones

Del. No	Deliverable name	WP n°	Lead participant	Estimated person months	Nature	Dissemination level	Delivery date
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

Milestone	Delivery date (due)	Delivery date (actual/foreseen)
Scientific Coordination Meeting in Huelva June 2008, 13 th and 14 th .		28
Catalogue of participation research-action methodologies, especially those suitable to be applied to territorial intelligence development projects	28	32
Catalogue of technological tools, especially those suitable to be applied to territorial intelligence development projects	28	32
Elaboration of a Video: “Research is at territories intelligence service.” This video shall include educational contents focus on citizens, showing main conclusions achieved by WP5. It will be subtitled in English and French.	28	32
Third Annual International Conference of Territorial Intelligence.	32	32

2.5.6. Prospects of work package 5 GOVERNANCE for next period

Main objective of this work program will be the integration of WP5 reflections, objectives, and reflections with WP6, especially WP6u and WP6s and WP4t activities.

In coordination with the former mentioned workgroups and taking in account the contents of the final version of the Quality Letter, during next period WP5 will be focused in the next task:

- Elaboration of a Catalogue of participation research-action methodologies, especially those suitable to be applied to territorial intelligence development projects (month 32).
- Elaboration of a Catalogue of technological tools, especially those suitable to be applied to territorial intelligence development projects (month 32).
- Elaboration of a Video: “Research is at territories intelligence service.” This video shall include educational contents focus on citizens, showing main conclusions achieved by WP5. It will be subtitled in English and French. (Month 32).
- Presentation of this deliverables (catalogues e video) in the 2008 Annual International Conference in BESANÇON, France (month 32).

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 part presents the global objectives and organisation of WP6 Tools. Then it details its progress for 2007 with the main coordination groups. At last it will suggest its prospects for 2008.

2.6.1. Work package 6 TOOLS objectives, work starting point and organisation.

Firstly we will present the specific objectives of the work package 6, then its starting point at the beginning of the year 2007 and its organisation during the year 2007.

2.6.1.1. Objectives of the work package 6

The WP6 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.

It strongly contributes to the CAENTI global objective.

According to the EU policies, the WP6 aims at designing and coordinating the implementation and the documentation of friendly tools, so as to help the actors of territorial sustainable development to elaborate, manage, observe, evaluate and transfer participative projects in multi-sector partnerships.

In 2006, the WP6 defined the specifications of a CATALYSE Toolkit, on the basis of the CATALYSE method. CATALYSE has been used for several years since 1989 by most of the CAENTI participants in multi-sector observatories. The latter ones use similar tools but collect and process different information contents.

In 2007, the WP6 aimed at integrating the CATALYSE tools and facilitating their access on Internet.

- Our first operational objective was to define the specifications of a broader document than the European diagnosis and evaluation guide for gathering individual information on the users of human services, an online individualised Inclusion Itinerary Accompaniment File, that we will call the “file” for the sake of simplification. As digital documents, the file will allow a better individual follow-up, the individual project elaboration and the user's inclusion itinerary evaluation, by a multi-sector and multi-professional team of stakeholders.
- A second operational objective is the drafting of the specifications for the processing and editorial chain from territorial data to results. This research activity was engaged in 2006 with a first definition of the Territorial Intelligence Community System, the TICS.

These two objectives prepared the specifications for a Territorial Information System, which will be the complete modelling of the TICS, for the next period. It will include a prototype of a portal on institutional territorial indicators available on Internet in Europe,

from the results of the Wp4i coordination group on territorial information accessible on European portal and national statistical socio-economic web sites.

Studying the feasibility of a *European Observatory of the Elementary School*, EOES is another WP6 coordination activity.

2.6.1.1. Starting point of the work package 6

In 2006 the WP6 suggested a modelling of the CATALYSE method and tools and of the CATALYSE governance. On these bases it defined the specifications of the CATALYSE contents and tools, and then it drafted their guidance notes according to their use by development partnerships.

CATALYSE is a method of territorial intelligence that puts the territorial analysis and the information technologies at the service of the territorial development actors, whilst respecting the sustainable development principles of global/integrated approach, partnership and participation.

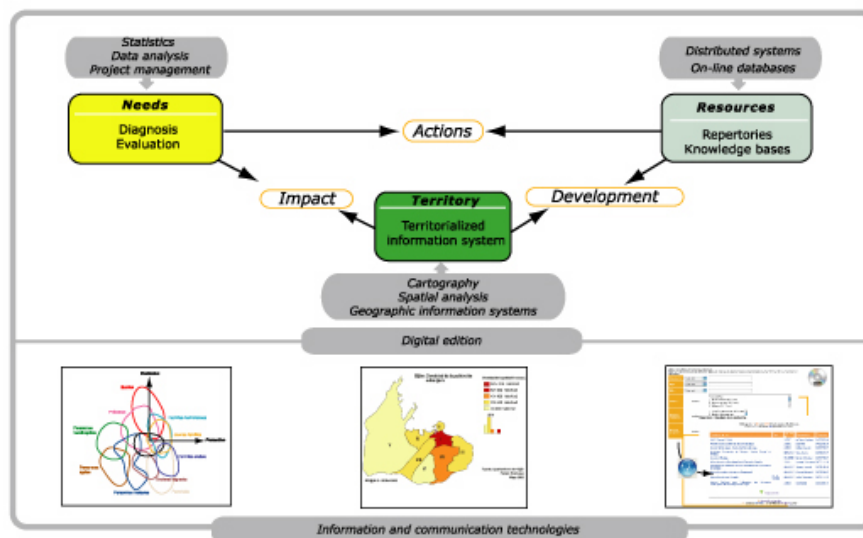


Diagram 6: Design of the CATALYSE method and tools

CATALYSE offers three tools that confront three kinds of information:

1. A multi-sector **guide for diagnosis and evaluation** gathers individual information about people's needs, so as to define and measure needs profiles. We will call it the "guide" for the sake of simplification
2. A **services repertory** lists the existing services on the territory that are able to satisfy the people's and the community groups' needs.
3. A **territorial indicators system (TIS)** that integrates territorial indicators that are provided by specialized statistic institutions.

In the grey zones of the previous diagram, there are the generic tools surveyed by the Wp4m coordination group on statistics and spatial methods of data analysis. They provide the technological modules for the professional tools like the needs' typologies and profiles, the online service repertory and maps.

Territorial indicators are selected according to the territorial information that is surveyed by the Wp4i coordination group and the indicators of competitiveness recommended by the Wp4c group.

WP6 made in 2006 a first modelling of the governance of the CATALYSE observatories, according to the use of the CATALYSE method and tools in the framework of territorial development partnership, which are multi –sector networks mixing public, private and non profit services.

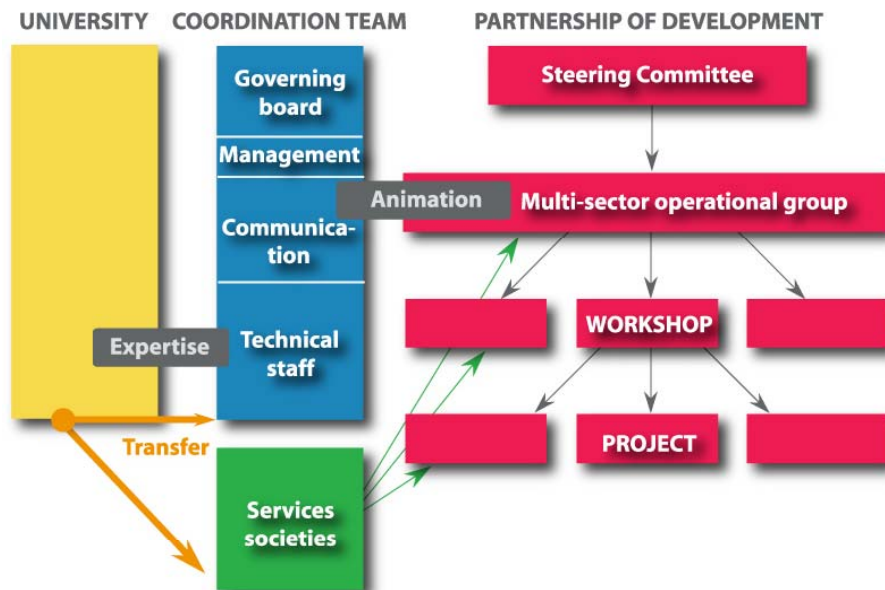


Diagram 7: Modelling of the CATALYSE governance

The actors who take part in the development partnership are gathered in an **operational group**. It defines all the useful data, supervises the analyses and interprets the results. It drafts the multi-sector guide of diagnosis and evaluation, the services repertory and makes the selection of the territorial indicators that are coherent with the guide. It regularly updates the documents or the databases. The partners gather the data and share them for the analysis. A qualitative diagnosis identifies the main needs profiles whereas the quantitative sorting estimates the importance of the corresponding persons groups.

Then, the actors participate to the results interpretation within thematic **workshops** that are defined and constituted according to the needs profiles. The workshops confront the needs that were underlined by the diagnosis with the services repertory to identify the deficiencies and non-adaptations of the offered services with respect to the needs. They also compare the needs territorial distribution to the services one. They confront the results to the territorial indicators to exploit the territory potentialities and to take into account its constraints.

This observation step generates projects that are drafted within the **project groups**. Then, it allows regularly evaluating the led actions.

On these bases, WP6 firstly defined the **contents** specifications:

- European guide for diagnosis and evaluation (deliverables 51 and 56)
- Services repertory (deliverable 53)
- Territorial indicators (deliverable 52)

Then, for the data analysis **tools**:

- PRAGMA for quantitative analysis (deliverable 54)
- ANACONDA and NUAGE for qualitative analysis (deliverable 55)
- Territorial indicators system (deliverable 56)

It also started studying the **uses** of the territorial intelligence tools within the development partnerships (deliverable 56):

- Data processing protocols
- Description of the CAENTI observatories
- Description of their observation mechanism
- Recommendations for use (first draft by OPTIMA and INTEGRA Plus)

As planned, more:

- An important experiment of the new documents and tools was initiated within the Spanish red of migration local observatories animated by ACCEM. We will call it the “ACCEM experimentation” for the sake of simplification.
- The concept of Territorial Intelligence Community System, TICS, offers a global framework to integrate data analysis modules and territorial information in an editorial workflow, according to the actors’ uses.

2.6.1.2. Organisation of the work package 6

In 2006, the WP6 was divided into three coordination groups:

- Wp6c drafted the contents specifications
- Wp6p concerning the tools specifications
- Wp6g about the guidance notes.

In 2007, we planned two coordination groups:

- Wp6f aims at drafting the contents specifications of the file
- Wp6d whose objective was the definition of the tools specifications in the prospects of their integration within an editorial chain from data to results.

In reality also survived the phantom of the Wp6g, as a coordination group for uses of contents and tools in the ground projects and experiments. So we had to create this coordination group that was made during the conference of HUELVA, in October. Until this date, Wp6f and Wp6d assumes jointly the follow up of the coordination of the CATALYSE Toolkit execution and ACCEM experiment.

The effort of the WP6 is detailed in the management and financial report (deliverable 5)

Thirty-two researchers collaborated in Wp6f and twelve in Wp6p. At the beginning these groups jointly animated the other activities of the WP6: CATALYSE Toolkit and follow up of ACCEM Experimentation.

Also survived the regional and linguistic organisation for the harmonization process from experiences thanks to regional steps:

- The University of HUELVA, ACCEM and VALDOCCO to harmonize the Spanish contents. For the guide, a first Spanish digest, called “guion” or “migrant's guide”, was suggested by ACCEM.
- OPTIMA and INTEGRA harmonized the “Walloon” guides with the University of LIEGE.
- ADAPEI and COCAGNE in France, with the University of Franche-Comté and the contribution of the EQUAL “MEDIATION” project.

The harmonization was also made with the standards of the official European servers.

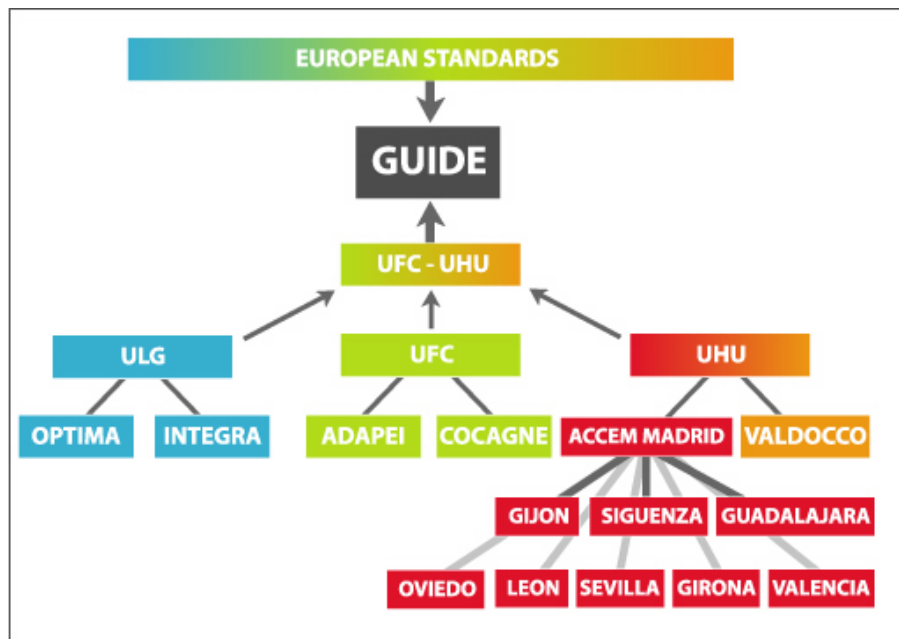


Diagram 8: European harmonization of the CATALYSE tools

We also inherit of the organisation of the network of the Spanish migrants observatories animated by ACCEM to experiment CATALYSE Toolkit (see the later part 2.6.2.4.1.)

This network coordination was made with regional coordination meetings:

- A global coordination meeting in MADRID (Spain), from 22nd to 23rd, March 2007
- Specific workshops and coordination meetings during the International Conference of Territorial Intelligence in HULVA, from 24th to 26th, October 2007
- A coordination meeting about uses in LIEGE (Belgium), from 14th to 15th, February 2008

2.6.2. Work package 6 TOOLS progress towards objectives

In 2007, the WP6 worked on the planned research activities, the drafting of :

- The specifications of an online “Inclusion Itinerary Accompaniment File” (IIAF)
- The specifications for the processing and editorial chain from territorial data to results

It also enlarged its research activities towards:

- The coordination of the CATALYSE Toolkit execution
- A more global survey and experimentations about the uses of territorial tools in development partnerships

2.6.2.1. Progress on specifications for an European on-line Inclusion Itinerary Accompaniment File (IIAF, Wp6f) - Group leaders: Jean-Jacques GIRARDOT (UFC) and Celia SANCHEZ (UHU)

Thirty-two researchers of all the participants of the CAENTI participated in work package Wp6f and drafted the “Specifications for an European on-line Inclusion Itinerary Accompaniment File”.

Researches led with the wp4i group about the territorial information, showed that the territorial indicators identified during the first period in deliverable 53 constituted a set difficult to extend, which generally satisfy contextual surveys led by the actors.

With this territorial indicators set, and service indicators of the repertory (see deliverable 52), the file that contains individual indicators is at the origin of the modelling of the TICS. The specifications of the latter are one of the wp6 research subject for the next period (Wp6s).

As a multidimensional tool for accompaniment, the file has acquired an important extension in comparison with our initial project. This part shows the main specifications of the file, and its structure to manage the individual follow-up, on the one hand, and global diagnosis and evaluation with structured indicators, on the other hand. In the file, the guide is always useful; it gathers the individual multi-sector indicators needed for territorial observation. So, we distinguished permanent specifications inherited from the guide from its particular specifications linked to its digital form.

The deliverable 57 updated the basic definitions of the contents and protocols of the guide from deliverables 51, 53, 54 and 56. It enlarged in the file structure, from the diagnosis and evaluation guide, with more personal information useful for the individual accompaniment. It compared the specificities of the file to the guide (see deliverables 51 and 56) in relation with their place in the CATALYSE method and in the TICS.

2.6.2.1.1. The file is an important support for human services adapted to the new context of the territorial governance and powered by ICT.

The file is a traditional support for human service, in sanitary and social institutions, inclusion or insertion institutions, reception and migrant's integration services, for actors in the fight against poverty and vulnerability, etc. It interests the public administration, as associative or private local actors, who both work more and more often in multi-sector territorial networks and are stimulated by ICT possibilities.

Stimulations happen within the framework of the governance development that is linked to economic and political trends of the economic and social crisis that began in the 70's. It has caused at an economic and social level, the stop of the industrial growth, mass unemployment, the fragilisation of social protection systems, the increasing of poverty, precariousness and marginalization. It marginalized social groups and some regions were affected by the industrial recession. Unemployed people, households with insufficient resources, homeless persons, alone people, handicapped, diseased and aged persons without resources were called "new poor persons", or "fourth world". They make the number of persons dependent on social and charity aids quickly grow up. Assistance plans and intervention methods evolve what involve a transformation of the file, which must be adapted to the description of more complex and diversified situations.

The crisis led to the change of governance methods, characterized by the decentralization of decision-making processes. Within this context, the accompaniment file, which is traditionally a document used for collecting and preserving information necessary to accompaniment, knew a renewal of interest, what strengthened the CAENTI project for determining the specifications of this file based on its partners backgrounds and the new issues that this document involves. Since several years, some CAENTI partners have developed computerization projects for the file in order to facilitate its use by stakeholders coming from many sectors: PARADA, then the OSUA system, implemented by ADAPEI since 1997, GORION system developed by ACCEM that recently cooperate to the national project SIRIA. VALDOCCO and COCAGNE also experimented such systems. So, to define

the specifications of the file we followed the same synthesis process we used in the first period for the CATALYSE guide.

During the coordination meeting in MADRID, on April 2007, the WP6 decided that the guide would be the file core.

2.6.2.1.2. A structure to adapt a traditional tool according to ICT: file, guide and observation form.

Thanks to the ICT, the file should be the support of multi and interdisciplinary, multi-sector and multi-professional practices.

Four types of considerations generally surround the file, that are detailed in the deliverable 57:

- The improvement of the human service quality, which implies a symmetric relationship between the accompaniment team and the person.
- The respect for the human right and the private life; the law generally asserts the user's right to access to all information and documents concerning him.
- The information sharing between accompanying agents that is subjected to professional secret.
- The using of the file for the evaluation by the development partnerships and for territorial diagnosis, which can be done only in an anonymous form and respecting the law about digital database.

The online file suggests more ambitious objectives than the guide, as for individual use, as for global one.

It is a *digital document*, which is liberated from the constraints imposed by a paper support such as for the guide. Its size is more limited by the capability to *construct a common language* than by the time. The *arborescent structure* of the file allows another time management *for optimizing the time of gathering* in comparison with the linear structure of the guide. It also resolves the data repetition by *the management of iterations*.

At last, the file feeds a *unique shared database* that allows *real-time control and processing*. The online file is really a cooperative tool, which can be simultaneously fed between many distant users. It allows a regular collective user's *paths follow-up*.

As so as the guide, the file that is originally a tool for individual diagnosis and evaluation can be used for global diagnosis and evaluation. Files can be grouped for global diagnosis and evaluation at various levels. Nevertheless, all the individual information can not be extracted from the file and it is not useful for a global use. It is necessary to implement in the file an "observation form" which gathers useful individual indicators for the achievement of diagnostics and evaluations on various lots of users.

This form has the same purpose as the guide but it contains more information. These individual indicators have to be structured, documented and kept in a form, which allows mobilizing and analyzing them easily. Useful information for the analysis of projects relevance and usefulness and of actions efficiency, effectiveness, cohesiveness and impacts, must be present in this form, like indicators required by the projects funds.

Finally, the **guide** gathers a minimal set of multi-sector indicators necessary for the diagnosis and evaluation at **territorial** level.

The **form** refers to a broader set of indicators, and deepens beyond the guide indicators specific to a **service**, a theme or a public.

2.6.2.1.3. Permanent specifications inherited from the guide

The file includes common specifications of the guide that were updated from the deliverable 56. Within the file information, the form, which includes the guide, is a space of structuring and formalisation for individual indicators intended for global observation. They both depend on constraints inherent in the data quality, the processing, the data analysis and the spatial analysis. The experimentations led with the CAENTI observatories allowed determining recommendations for the evolution of the guide. Wp6f updated the specifications concerning the indicators of the form from the deliverable 54 and from the experiment of OSUA and SIRIA systems, respectively by ADAPEI and ACCEM.

The structure of the guide is not modified after its inclusion as core of the form. Some changes characterize the guide:

- The guide can be reduced to the indicators of territorial interest
- The file now gathers the personal information for the management of identification, the individualized diagnosis and the evaluation of the individual path.
- The services useful for the person should constitute a part in order to be compared with services repertory for the territorial evaluation of human services, in terms of relevance and localization.
- The same indicators, considered from the point of view of accomplishments should also be determined in the section evaluation.
- Because of the guide territorial orientation, the individual indicators comparable to territorial contextual indicators must also be gathered in the guide.

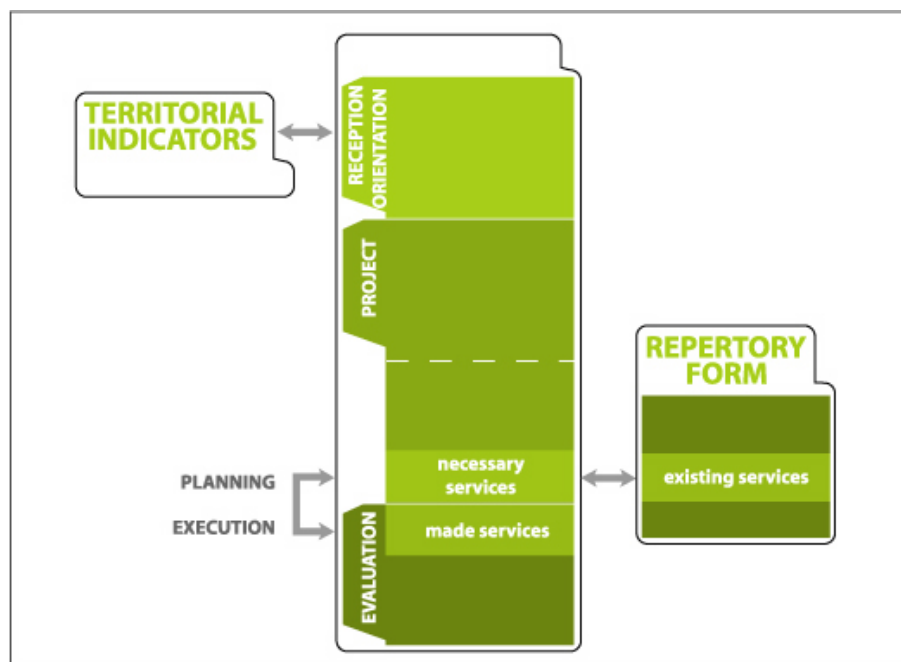


Diagram 9: contents articulation of the guide in the file

The form completes these indicators with a series of specialized blocks according to the main categories of human services.

2.6.2.1.4. Particular specifications of the file

The specifications particular to the file result from, on one hand, the fact that the file concentrates personal information protected by the professional secret and, on the other hand, new possibilities offered by the digital characteristic of the file.

- The management of access rights protect the personal information
- An intervention form makes distinct the file from the guide.
- Synthesis variables are important elements for the modeling of processing protocols.
- Iterative loops repeat a series of questions as many as necessary
- The arborescent structure where only relevant and useful questions related to the situation of the person are asked.
- These two last specificities are related to blocks of questions.

The form is composed of thematic blocks. However, the block notion does not involve a thematic reference.

2.6.2.1.5. Conclusion

The accompaniment file is a tool used to improve the quality of human services. Information it contains must be useful for the person's multi-sector accompaniment, by many accompanying stakeholders. It involves the participation and the agreement of the person about information gathered, completed and updated throughout the person's accompaniment. The content, the access conditions and the accompaniment file use must respect the law in effect.

The file management is made by an information system. We will now study the functions that are linked to the file processing in the Territorial Information Community System. The file structure will help you to manage the functions of individual accompaniment, and the ones of global diagnosis and evaluation involving the gathering of individual indicators about users' groups in an anonymous form, at service or thematic level with the form, at territorial level with the guide.

These whole specifications, which most part aims at improving the automation of individual indicators analysis, will be developed by the wp6s coordination group whose objective is the modelling of territorial intelligence community systems.

2.6.2.3. Progress on data processing tools specifications (WP6D) - Group leader Cyril MASSELOT (UFC)

In 2007, the Wp6d research coordination group organizes a narrow researchers and engineers staff of twelve persons to design the *specifications for the processing and editorial chain from data to results*.

The data-processing and technical specifications established in 2006 allowed quickly initiating the execution of the tools that were useful for the ACCEM experimentation. ADAPEI, INTEGRA and COCAGNE, which are experienced actors in online tools, were also associated to this research action, as about contents, guidance notes and uses. All members of caENTI will try the new online Tools by a specific inquiry (cf. WP3 report, communication part).

As specific starting point, the activity of this group follows the work of the Wp6p group: after the specifications of Catalyse tools, we need to describe how this tools can work online. The Wp6p group defined the conceptual, methodological and technical specifications of PRAGMA, and more globally of the data gathering, 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). The specifications are available in the deliverables 51, 52, 53, 54, 55 and 56.

Cyril MASSELOT (leader and ICT specifications), Jean-Jacques GIRARDOT (TICS specifications), Sylvie DAMY and Bénédicte HERRMANN (computer sciences modelling),

Ahmed HAMMAD (database modelling), Ahmed HOUSNI and Rémi THOMAS (ePragma), Jonathan BENILAN (Anaconda 2.0 and jPragma), coordinated the main tasks.

More of coordination meeting of WP6, Wp6d had particular internal coordination meetings:

- Besançon (France), September 2007, 9th
- Besançon (France), December 2007, 7th
- Besançon (France), December 2007, 10th
- Besançon (France), December 2007, 19th
- Besançon (France), January 2008, 12th

It developed in Coospace a WP6D Specific scene, with a bulletin board for Wp6d news and three specific forums (Anaconda 2.0 new versions, tests and results - jPRAGMA (java version) MCD specification - epragma (online version) : MCD specification) and a specific mailing list: wp6d@msh.univ-fcomte.fr

As cross activities with the others groups of the WP, the Wp6d group had:

- To include the results of the activity of the WP6C: the objective was to describe in the specification of tools how to include the Guide, the form of the repertory, and all contents of the Catalyse toolkit (cf. deliverable 52 and 56).
- To articulate his specification with the investigation of the WP6F, by the specification of the on-line help (manual and dictionary of contents). The point is to prepare the Catalyse toolkit to organize a guidance way inside the tools.
- To follow the work of the WP4I, to be prepared for the inclusion of the portal of indicators into the Catalyse CMS.

At least, because of the online objective of all of this, we linked with the WP3 team, to attempt articulate the access of the Catalyse toolkit with the IT portal.

As the technical specifications for the tools of the CATALYSE Toolkit were given, and first tools existed:

- PRAGMA collect version,
- Complete PRAGMA version for data analysis,
- ANACONDA and NUAGE.

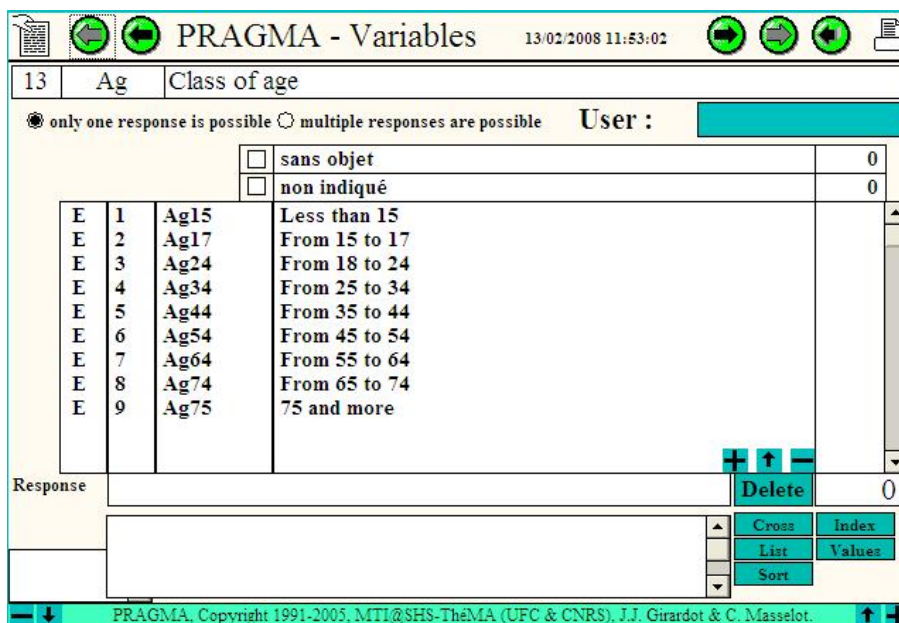


Diagram 10 : Pragma classic, page of a question

The WP6d began here, to develop the specifications for more friendly, free, multi-platform and multi-language versions, for the CATALYSE Toolkit:

- jPRAGMA, java version of PRAGMA
- Integration of the software ANACONDA and NUAGE, in a new version of ANACONDA.

Then, the Wp6d also focused its activity on conceptual specifications of the TICS, the on-line versions in the prospects of the TICS:

- epragma: online version of PRAGMA, to link to jPRAGMA
- eanaconda: online version of java version of ANACONDA and NUAGE
- CATALYSE CMS: web site pattern, including the Territorial Indicators System (see deliverable 56), the repertory (see deliverable 52), a library, and the access to the CATALYSE toolkit.

2.6.2.3.1. Integration of the Catalyse tools in the Catalyse Toolkit.

The coordination of the execution of the Catalyse Toolkit following the integration design that was showed in ALBAC conference in 2005 (GIRARDOT, 2005)

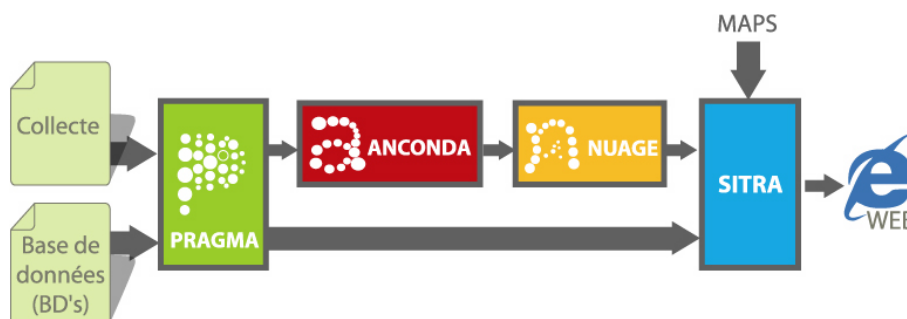


Diagram 11: Integration of the CATALYSE tools

Thus, at the end of 2006 and at the beginning of 2007 were executed:

- The execution of a PRAGMA version limited to the key-in. It is limited to the data gathering (adding, modification, suppression error: individuals deactivation,

questionnaires import if empty, import-export of individuals, balance and table for the data-analysis), so as to reduce the risks of manipulation or intrusion errors. This “gathering” version is provided with the European guide. It will be enriched by synthesis questions.

- The development of jPRAGMA, the Java version of PRAGMA.
- The integration of the ANACONDA and NUAGE software, in a new ANACONDA 2.0 version.

2.6.2.3.1.1. jPRAGMA.

jPRAGMA is a standalone, cross platform et multi-language version of PRAGMA in JAVA. It is directly usable on a personal computer, independent from the kind of personal computer and from the exploitation system. It is able to work on free systems. It uses again the general architecture of the PRAGMA Toolbook version. It can be use on every actually versions of operating systems supporting Java (Windows Vista, or XP, Linux, MacOS

The jPRAGMA standalone version is presently developed:

- in a “key-in” version limited to the data gathering operations
- in a “treatment” version, the complete one

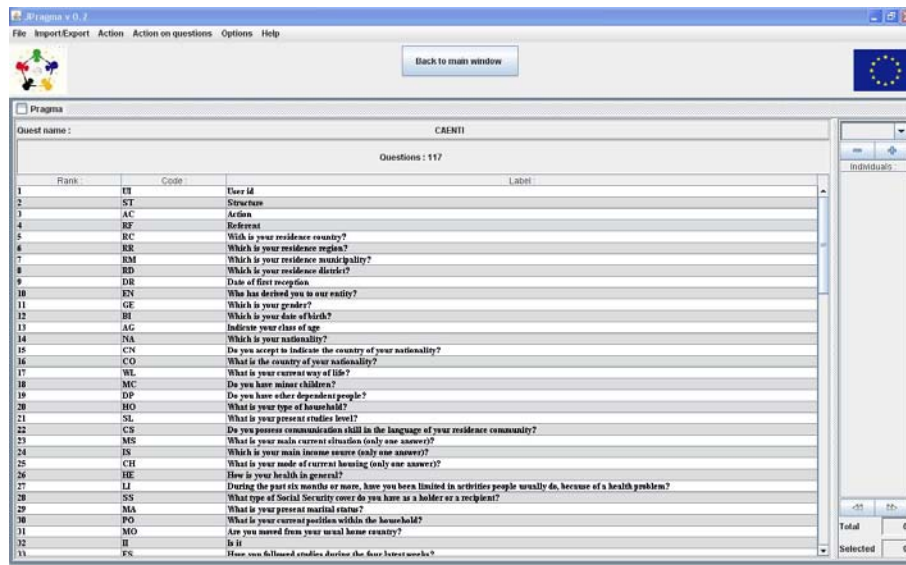


Diagram 12: PRAGMA multi-platform gathering version (Prototype)

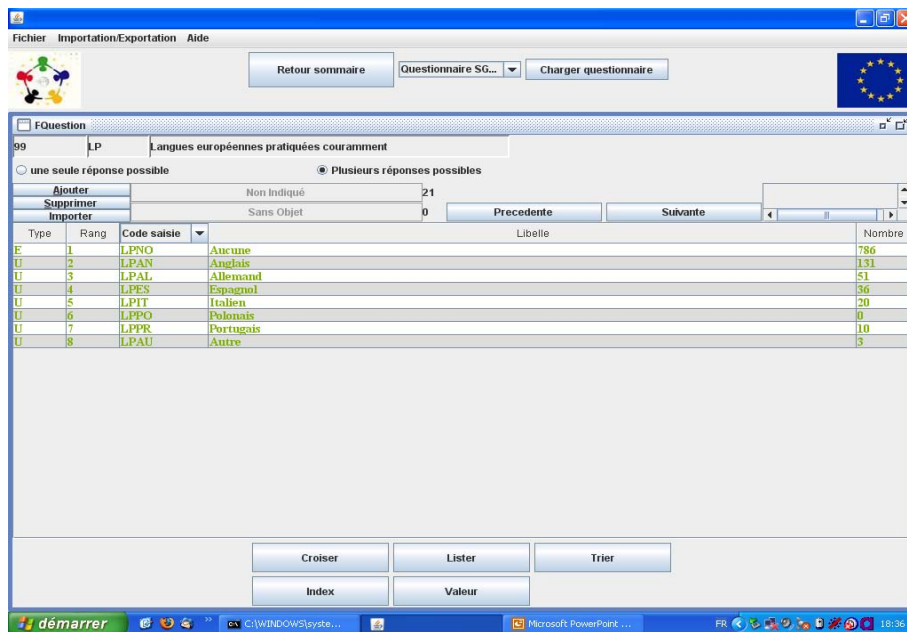


Diagram 13: Screen of PRAGMA key-in (Prototype)

2.6.2.3.1.2. ANACONDA 2.0

The qualitative analysis software ANACONDA and NUAGE, which particularly allow calculating needs (and services) profiles are presently integrated, what improves the results interpretation. They constitute a new multi-platform version ANACONDA 2.0.

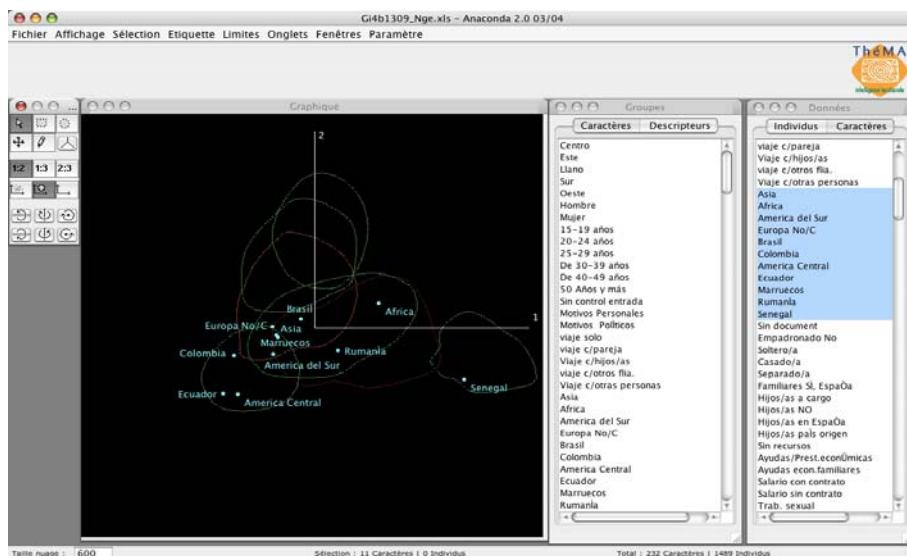


Diagram 14: Integration of ANACONDA and NUAGE

Like jPRAMA, ANACONDA 2.0 version is also standalone, cross platform and multi-language

That allows initiating the integration of PRAGMA and ANACONDA. It will improve the interactivity between the quantitative treatments and the qualitative analysis.

2.6.2.3.1.3. Free mapping tools adaptation

The Wp6d coordination group also works to adapt free and friendly cartography software that manages territorial indicators.

We also experiment with ACCEM and INTEGRA PhilCarto software.

As a consequence, the CATALYSE Toolkit will offer a complete set of statistical and spatial analysis tools that will be accessible on line when the actual prototype will be tested what is done in ACCEM experimentation in particular.

2.6.2.3.2. Integration of on-line CATALYSE tools in the prospects of the TICS.

WP6p draft three specifications of the integration of these tools at an upper level, online, in the TICS. Some prototypes are also experimented.

The specifications are those of the TICS, the data processing ones and the ICS ones. The prototype tools are epragma, the CMS CATALYSE and mapping online solutions.

2.6.2.3.2.1. TICS specifications

The definition of the SCIT concept very quickly started the following steps, specifications for the online file, territorial intelligence system that will integrate a portal of territorial intelligence indicators in 2008. When a territorial information system integrates technical functions, generally for experts, the Territorial Intelligence Community System is at the service of a community for and with territorial actors of sustainable development (GIRARDOT 2007).

2.6.2.3.2.1.1. TICS Modelling

According to the following diagram, the research actions on the TICS modelling will concern:

1. The integration of the statistical and spatial analysis functions (in blue in the next diagram)
2. The analysis protocols modeling (red)
3. The specifications of the documentary and editorial chain (green)
4. The integration of the social uses (orange)

Diagram 15: Territorial Intelligence Community System

The **integration of the statistical and spatial analysis functions** followed the diagram of integration of the CATALYSE tools (see part 2.6.2.3.1). Then we worked out online versions as it will be showed in this part. We began integrating software, but we prefer to talk on functions, because it is clear now that the definition of the modules of the software will finally depend on the uses.

The **modelling of the protocols of statistical and spatial analysis** yet depends on the sequences of software, on the one hand, and on the global phases of the processing, on the other hand. We cut it into six phases in order to identify the internal steps of each one : data gathering, coding and recoding, quantitative analysis, qualitative analysis, spatial analysis and publishing of results on line. Appendixes E and G of deliverable 57 showed detailed protocols.

Concerning **documents and editorial chain**, TICS gather a large variety of documents from the most usual to data tables, statistical tables, histograms, maps, factorial spaces, classification trees, and so on. We engaged the harmonisation of documents with the integration of software and the definition of protocols. We definitively choose Dublin Core for the metadata. We also have now to identify units of information in the documents to attach the metadata. We also have to define a process for the automatic definition of the metadata of the documents that are work out by the system and for the update of the metadata of the used documents. With epragma we draft a first editorial chain including, with the access rights, other rights to manage and edit documents.

We suggested a first **modelling of the uses** on the base of the CATALYSE governance according to the participative functioning of the development partnerships (see 2611 diagram of development partnership governance). They were deepened on the base of the communicational approach (see part 2.6.2.3.2.1.3).

2.6.2.3.2.1.2. Computer sciences TICS design specification

The cooperation with computer sciences specialist was necessary to complete the data statistical analysis with tools of spatial analysis and cartography, then to update the specifications and to make the basic software of data statistical and spatial analysis evolve towards cross platform versions within the framework of networks and Internet.

Computer sciences researchers also began drafting specifications for a deep evolution of the territorial information systems. The basic specifications were suggested in a communication during the conference of HUELVA, in October 2007 (DAMY, 2007).

PRAGMA and ANACONDA, the fundamental analysis modules of the TIS were initially developed as complementary software. These software programs were principally used by faraway partners belonging to different entities and networking. The need to integrate these software programs then make them accessible from a distance was quickly expressed.

Following the Internet development, the users wished have an online TIS because Internet introduced at the same time as the use from a distance, a stronger cooperation between actors. This latter led to TIS fundamental evolution towards the TICS devised according to actors uses.

The integration of TIS basic modules started with the strengthening of their portability and their usability and the development of solutions for multi-user access. Present research is about the online access to basic modules.

The TIS should be usable on computers of potential users and could be installed as it is without involving particular tools or configurations. The basic modules have been progressively rewritten in Java in order to integrate them in cross-platform TIS, based on free solutions, that could be installed and used as easy as possible. This rewriting is made from the specifications of deliverables 54 and 55 and beforehand delimited technical computer specifications. It also allows reorganizing the data storage and the production line of information.

The NUAGE software has been rewritten in Java to provide the same functionalities as the MacSpin software which had become obsolete. ANACONDA has been rewritten in Java and parameterized. The rewriting of PRAGMA in Java is the occasion to plan a three-tier architecture, to streamline the operative line around a global database. In a first step, the ANACONDA and NUAGE modules have been united.

The TIS can be used within the framework of cooperation on a same computer or on line. This introduces a TIS **multi-user access**, which poses traditional problems about data confidentiality, secured access to the TIS and concurrent access to data. Traditional computer science notions such as privileges and users groups have been introduced according to a user-group-administrator traditional hierarchic logic by experimenting the transverse notion of partnership. The database reorganisation allows delegating to adequate tools, the Database Management Systems (DMS) and problems about concurrent access to data.

The **TIS on-lining** requires the conception of web pages. The TIS main part concerned by its onlining is the PRAGMA software. Two main versions of the TIS coexist, an online version usable from a distance and a version locally usable. A modelling work is in progress in order to plan a TIS unique model allowing in the future the conjoint development of these both versions. Eventually, the objective is to offer to users a TIS accessible from a distance without any local installation.

The TIS use causes the production of an important number of documents for which a description by a metadata set of the Dublin Core kind was suggested.

2.6.2.3.2.1.3. ICS specification

Social actors involved in the territorial observatories adhere to the necessity to produce quantified and qualified information in order to guide their actions according to populations needs. In reference to the communication cycle of MUCCHIELLI (2003), the CATALYSE method is firstly interested in two times very specific to notions brought up by the SIC:

- The sense production, which occurs during the data processing into information
- The communication elaboration strictly speaking, according to initial data and produced information.

It is advisable to structure these steps in a communicational aim without neglecting the scope of uses.

The first step, so-called sense production, is thought according to the different required communications: internal communications in the team leading the project and in the operational group; external communications (public publication). We have to go beyond the mission of traditional observatories, which organize their intervention as an external expertise to the project. CATALYSE method completed by the TICS scheme modifies this approach to incorporate it in an informational process that makes a vital governance factor. Actors describe on their own indicators allowing them to lead the territorial intervention, actions to implement, to redefine or to requalify. Experts have a role of scientific accompaniment but also a role of transfer, thus a role of training. They are not external anymore to the approach, but really involved in the different observation times.

The conceptual analysis of every communication product involves some number of considerations that it is advisable to lead to produce the link between the information made and the actors of the reception. The identification of target publics and the consideration of the issues diversity should give a clear frame of the communication act complexity as of the communication objectives and purposes. The specificity of the TICS communicational approach is mainly about the fundamental function of transfer and training, related to the

innovation of the territorial systemic approach and its constituents. The deepening of expectations horizons and the development of meaning networks complete the production of the link which is then co-built between actors of the transmission and actors of the reception underlining the reality of a project community, important condition for the approach appropriation.

The whole issue of the communication comes true in the practices they are made with, in the **consumption of both dimensions** about the product sense (information) and the created link (communication). Practices of the produced information include many stacked processes, each one adding by definition a new value to the modified object, from facts to data, from data to information and from information processing to knowledge.

The last part of the communication cycle aims at **rebuilding the sense** of observed facts, data, created information and developed links, after the diffused results and so the consumed results. According to durability of observation this scheme does not have sense if it is thought according to a bad temporality, that is to say from a linear view and not from a cyclic view.

2.6.2.3.2.2. Onlining software

2.6.2.3.2.2.1. epragma

The group Wp6p coordinated the development of the online version of PRAGMA, epragma. A first version is available for tests. It suggests the following functions with the corresponding rights management:

- To create and manage partnerships. A partnership is a specific object that gathers several structures. Structures have a hierarchical organisation, but not the partnership.
- To create and manage projects in a partnership
- To organize in a project several questionnaires for data gathering and quantitative treatment
- To digitalize the diagnosis and evaluation guide in a questionnaire
- To organize the collective work in a questionnaire (manage users)
- To organize the data key-in, by users, in a questionnaire (add, modify, delete)
- To manage the quantitative treatments (to calculate, to publish)
- To structure the data table in a standard format for the qualitative processing in ANACONDA.

This version was tested with Spanish migrants observatories, then for a real enquiry concerning 1000 persons.

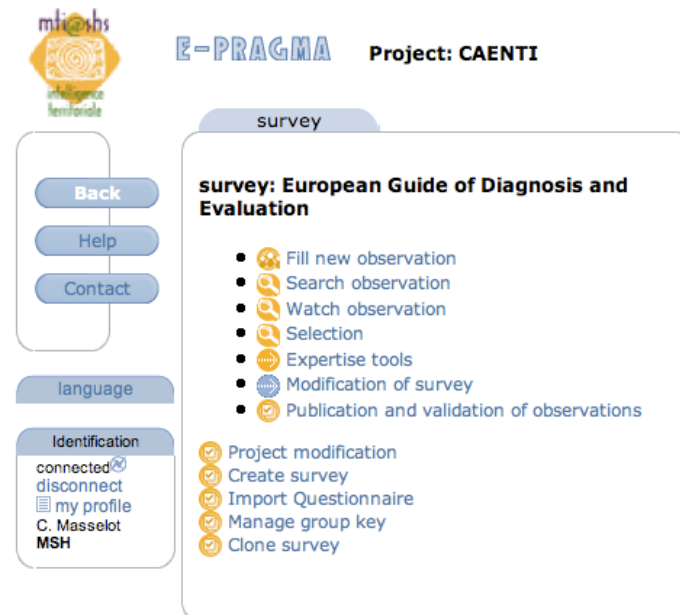


Diagram 16: Screen of PRAGMA online key-in (Prototype)

Four PRAGMA versions are presently available:

- a classic "key-in" version, whose functions are limited to key-in.
- a classic "treatment" complete version
- jPRAGMA, the standalone cross platform version in JAVA.
- epragma online version, that is recently developed in a "key-in" version

All these versions are compatible. They exchange questionnaires and data. JPRAGMA and epragma feed the same data basis that can later be analyzed with a « treatment » standalone version, classic or jPRAGMA. Thus, they can be jointly used. The partnerships can evolve as they decide. In a partnership, each actor can use them to key-in the version he/she can or want, according to his/her computer, system manager, skills or preferences.

Wp6d, also began to design the specifications for a complete online version of PRAGMA, with dedicated guidance notes.

2.6.2.3.2.2.2. Territorial indicators mapping.

We also updated the free cartographic tool to map the information of the Territorial Indicator System (TIS).

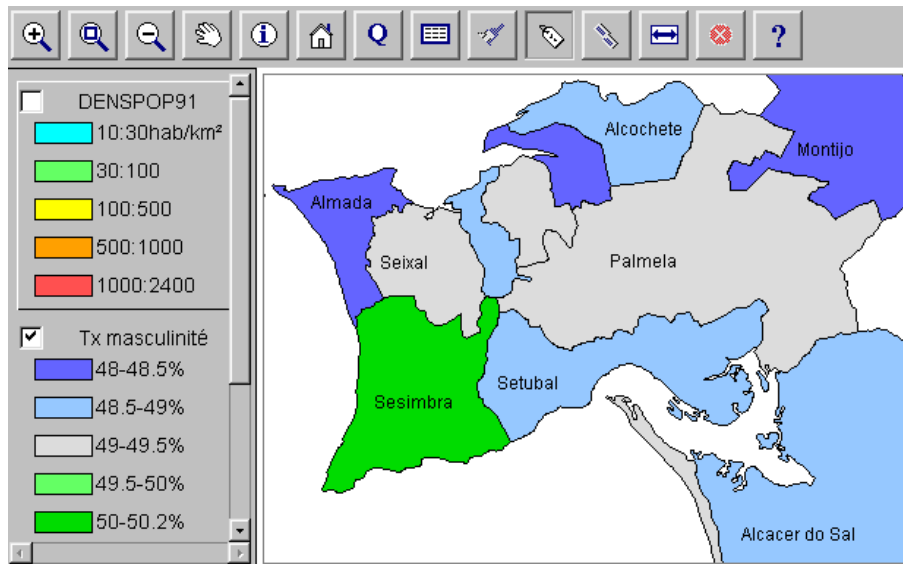


Diagram 17: Territorial Indicators Cartography

2.6.2.3.2.2.3. CATALYSE content manager system

More than planned, a CATALYSE Content Management System (CMS) was also worked out. It is a website whose contents can be directly managed. It integrates the services repertory, that was the first online CATALYSE toll (see deliverable 52), and a document base. The idea is to organize the access to all the information about a Catalyse Observatory (official presentation, work in progress, results, data, maps and clouds of needs profiles (profiles?)) and at the same time the access to the Catalyse online tools, in an intranet part: ePragma, eAnaconda, 3D representation of results, and dynamics maps (see deliverable 56 part 2).

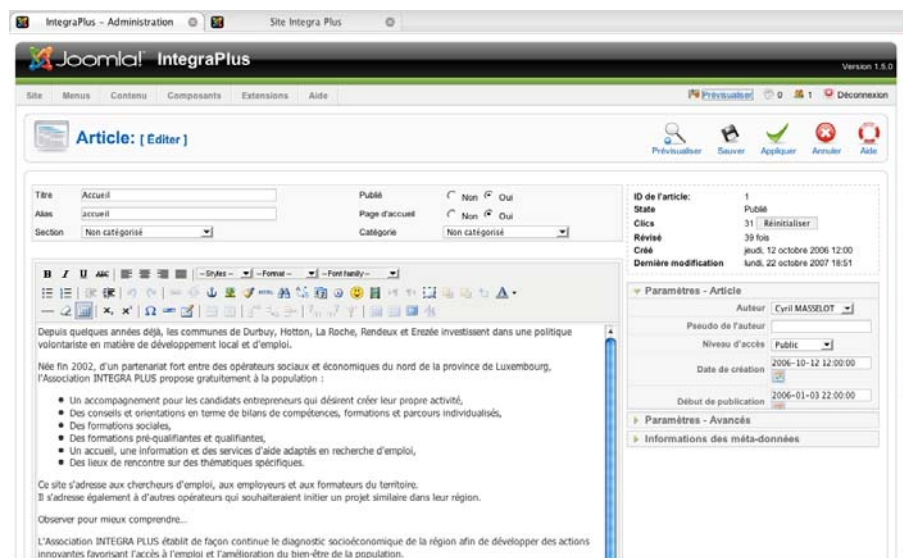


Diagram 18: CMS CATALYSE integrates the Services Repertory

Specifications of the CATALYSE CMS were initiated with the base of an existent CMS called “Joomla” after an analysis of this kind of tools. It is an open source solution (free and under a GNU General Public Licence), multilingual, easy to use for a non informatics administrator, and easy to install and to manage, especially with the new 1.5 version.

The CATALYSE CMS is an empty web site with the most usual service you need in a territorial observatory. It was experimented with the transfer of the contents of the INTEGRA

web site from a static structure to a dynamic management. It will be also used to renew the joint web site ODINA of the migrants' observatories of Gijon and Oviedo, located in the province of Asturias in Spain.

This CMS is also a basic solution for the CATALYSE toolkit and to develop the territorial intelligence community system, as these project evolved in a good complementarity.

2.6.2.3.3. Results of the Wp6p coordination group

The wp6p updated the specifications of the CATALYSE tools and the TICS, concerning the integration of tools from data to online edition. It began conceptual information in computer sciences, and in communication sciences for the design of the TICS, which is a task of the third period.

Wp6p also coordinates the drafting of technical specification and, more than planned, started the working out of the software. Concerning software development, we can summarize the situation for the end of the second period as listed below.

A key-in version of “**classic**” **PRAGMA**, with guidance notes for the data key-in in Spanish, was work out through the ACCEM experimentation (see appendix of the deliverable 57). A complete version of classic PRAGMA in English and in French, including the European guide in its English version, is also made.

The specifications of **jPRAGMA** for a complete java PRAGMA version were drafted. A data key in an English version, including the European guide in its English version, with guidance notes, was worked out. Then the technical specifications for a complete new java version of PRAGMA in a multilingual version, English and French, were defined. New modules are now tested and available: questionnaire digitalisation, data key-in, data import-export, global sorting and date table (for qualitative analysis) export.

The technical specifications of **ePragma** were drafted. The basic modules were developed: questionnaire digitalisation, data key-in, global sorting and data table export, in conformity with jPRAGMA (same steps and same documents). Particular specifications like the management of access rights, at partnership and project levels, were improved. Epragma was experimented in several different situations and contexts (online enquiries, classic telephone survey, CATALYSE diagnosis ...)

Wp6p also coordinated the drafting of specifications for compatible import and export modules between all the versions of PRAGMA. It designed and worked out a joint database for jPRAGMA and epragma. It wrote the technical specifications for the integration of epragma into the CATALYSE CMS

The integration of ANACONDA and NUAGE in ANCONDA 2.0 Java version was finalized, with technical guidance notes. Some functions were improved as interfaces, results files, real 3D representation and the possibility of showing the data linked to a point.

The technical specifications of eAnaconda were wrote for the online version of Anaconda, including the 3D representation module called Nuage, as for its integration into the CATALYSE CMS.

The technical specifications for the integration of PRAGMA and ANACONDA are defined.

The basic functions of the CATALYSE CMS are available but they have to be tested. The same services, as on the initial observatories web sites, are available and can be easily manage by the users. The CMS is organized in order to progressively integrate the

CATALYSE tools with the users' rights to access to the tools and their data. The CATALYSE CMS will gather standalone and online versions of the tool because the users argued on their complementarity. They asked for standalone and online versions cooperate together or at different situation and times.

A first simulation of what can be done is given by the dedicated CATALYSE blog <http://www.territorial-intelligence.eu/catalyse/>, which allows now downloading the nearest version of each validated tool, and being notified when a new version is on line.

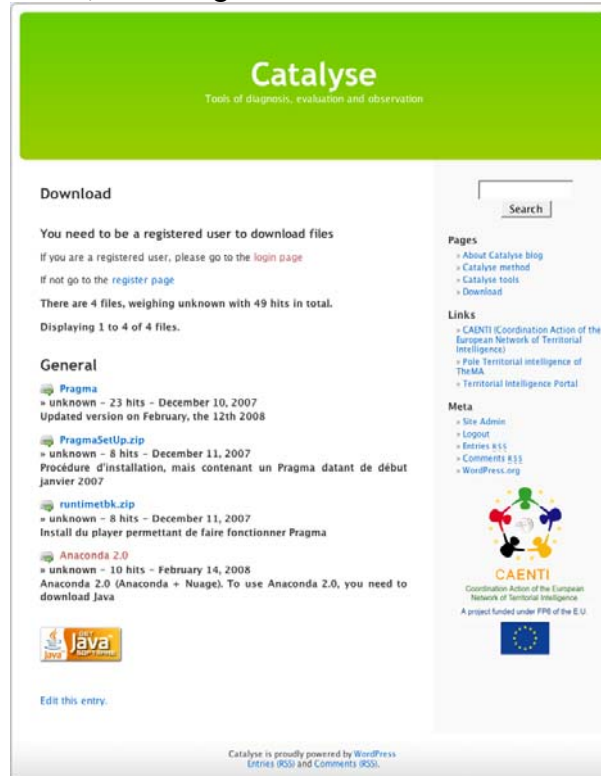


Diagram 19: Catalyse blog

2.6.2.4. Progress on the execution of CATALYSE Toolkit.

This activity is more involved in the coordination of the CATALYSE toolkit execution, than in this execution that is also accomplished with particular funds. It was made in the coordination groups Wp6f and Wp6p, respectively for contents or tools.

The coordination meeting of MADRID on April allowed establishing the outlines of the CATALYSE toolkit:

- European Guide of Diagnosis and Evaluation (whose mock-up is in English, French and Spanish)
- Definitions of the questions and modalities
- Protocols of processing, statistical analysis and cartography.
- Gathering software PRAGMA
- Quantitative processing software PRAGMA
- Qualitative analysis software ANACONDA, which integrated the NUAGE software
- Content management system CATALYSE which integrates a services repertory
- Map software
- Handbooks of the PRAGMA, ANACONDA, repertory and map software. The mock-up of the contents in English and Spanish was started by the Universidad

de HUELVA. The mock-up of the contents in French is made by the Université de LIEGE.

- Recommendations of implementation of the CATALYSE method on the basis of the document jointly established by OPTIMA and INTEGRA.

The specifications of the European diagnosis and evaluation guide are published in English in the deliverable 56, part 1. Three operational versions with page setting were established in English, Spanish and French were elaborated. They are progressively integrated in the different versions of PRAGMA, because it implied the software programs are also translated. The translation of the contents, tools and guidance notes is a long activity.

The definitions of the guide questions published in the deliverable 56 were debated again and completed, as the protocols. The contents articulation between the guide, the repertory and the territorial indicators was carefully checked. The updated documents are joined as appendix to the deliverable 57 on the file.

As the specifications of the file showed the utility of conserving the guide as core of the file, in order to make diagnosis and evaluation at territorial level, we need to reorganize the contents of the guide. The deliverable 57 gave some recommendations. The principal one is to organize in the guide the comparisons between:

- The needed service (project part of the guide), the available services (repertory) and the used services (evaluation part of the guide)
- The individual indicators (guide) and the territorial indicators (territorial indicator system then portal of territorial indicators)

A good articulation between the guide and the file is a general demand of the local actors, which are firstly afraid of the diversity of documents. Partnerships are interested in the possibility of using the file that is perceived as a professional heavy document and the guide. Some observatories, which use the guide, think it is not possible that all the partners evolve together from the guide to the file.

We saw the standalone tools and the online tools will be very linked in the CATALYSE CMS. On the contents side, as the guide, alone or within the file, is oriented towards territorial diagnosis and evaluation, it will be particularly implied in the design of the TICS. The file is more globally implied in the modelling of the SCIT as a information source (with the territorial indicators) and a first line document.

At last, the WP6s can be the good place to coordinate the TICS and the CATALYSE toolkit.

2.6.2.4. From Wp6g to the creation of a Wp6u coordination group about uses.

The lack of coordination about the uses of territorial intelligence appears progressively during the second period. Firstly to coordinate ACCEM experimentation, then to harmonize the approach of ground territorial intelligence projects.

2.6.2.4.1. Follow-up of experimentations

The ACCEM experimentation was a new experimentation in CATALYSE observatories. It was followed up by the Wp6f for the contents and by the Wp6d for the tools. It worked hard on these two points during the first semester. Then it needs more discussion than internal evaluation about uses.

At the end of the first period, OPTIMA and INTEGRA have began a joint draft of recommendation for the use of CATALYSE method and tools in development partnership. These recommendations were listed as a piece of the CATALYSE Toolkit in the MADRID

coordination meeting, on April 2007. In HUELVA conference, on October 2007, the concerned actors asked for an evaluation of the use of CATALYSE Method before rewriting the recommendations they wanted to summarize for discussion.

In HUELVA conference, on October 2007, OPTIMA evocated the possibility to make another experimentation in CHAPELLE-LEZ-HAIRLAIMONT (Belgium).

2.6.2.4.1.1. ACCEM Experimentation

This experimentation concerns a network of nine Spanish migration local observatories coordinated by ACCEM. Four are former ones: MADRID, GIJON, SIGUENZA and GUADALAJARA. Five are new ones: OVIEDO, LEON, SEVILLA, GIRONA and VALENCIA. These observatories are developed within the framework of local development partnerships and they are integrated in a national network at the ACCEM level.



Diagram 20: ACCEM Experimentation

This experimentation began within the local migration observatories animated by ACCEM in Spain, by using the ACCEM migrant's guide that is close to the European guide. The ACCEM migrants guide constituted a first synthesis of the ACCEM guides (ODINA and OPASI) and it has been operational since April 2006.

As most of the European guide indicators that are also part of the migrant's guide, it is an indirect experimentation of the European guide. It gives to the comparative research activity a very concrete reference that allows jointly studying:

- The contents understanding by the end users and how to create a common language at this basic level, because it is the first condition to improve the data quality;
- The tools use by the end users with poor computer skills;
- The quality of the data gathering;
- The data analysis according to the local and national levels;
- The tools uses within the framework of local partnerships and national networks.

Six territorial diagnoses were made by the six ACCEM observatories, three former ones and three new ones, in 2006. They allowed testing the contents accessibility, understanding and quality. Their processing in 2007 allowed confronting the protocols of data statistical and spatial analysis in various partnership and territorial contexts. First changes were made at the end of 2007. Consequent modifications in meanings and protocols are in progress within the ACCEM.

2.6.2.4.1.2. CHAPELLE-LEZ-HERLAIMONT Experimentation

OPTIMA came in HUELVA conference with two representatives of the village of CHAPELLE-LEZ-HERLAIMONT, to study the possibility to implement a new territorial observatory in this rural commune, as an experimentation of CAENTI. OPTIMA was in charge of elaborating the project.

In the LIEGE coordination meeting, on February 2008, the project was in progress with the development partnership.

2.6.2.4.2. Harmonizing the approaches of ground territorial intelligence projects

The study of the CATALYSE method implementation and uses in the development partnerships began in the first period by describing the CATALYSE observatories and their observation approaches (see deliverable 56, part 3).

During the coordination meeting of MADRID, we decided to complete the descriptions of the CAENTI development partnerships, as well as the descriptions of their observation device. The objective is not to fill in forms, but rather to establish an editorial canvas that allows making a homogeneous presentation, but not a uniform one. Thus, their redaction could be used again, from descriptions established by the concerned actors and with the concerned actors, in a journalistic spirit. To do so, we would have to complete the descriptions by scientific analyses. The use recommendations jointly drafted by OPTIMA and INTEGRA can provide a canvas for this evaluative study.

During the HUELVA conference we suggested unifying and widening this step because CAENTI worked out many approaches about territorial intelligence projects, in different but complementary ways:

- Within the Wp4p, in which we wished to identify projects in the territorial intelligence field funded by the European Union, and which were external to the CAENTI.
- Within the WP5, universities analysed research-actions, which constituted territorial intelligence projects achieved in the CAENTI universities, but which were not development partnerships using the CATALYSE method.
- Within the Wp6g, five Catalyse development partnerships were studied. Three of them were the subject of a more deepened analysis about their observation methods.

More descriptions of actors involved in the CAENTI and articles suggested for the focus of the territorial intelligence portal.

Because they were not considered from the same point of view, these projects were, of course, neither described nor analyzed from the same grid in these different approaches. Each approach used its grid, complementary but different from the other ones.

The Wp6u coordination group was created in HUELVA conference to make a large survey on territorial intelligence projects in Europe starting from CAENTI and from CATALYSE projects.

A first task to perform was to analyse and to evaluate the uses of CATALYSE method and tools within CAENTI observatories for the LIEGE coordination group, on February 2008. That was done. On this basis OPTIMA and INTEGRA Plus will redraft their

recommendations for the use of CATALYSE. It will be discuss in CAENTI coordination meeting on June 2008.

Wp6u will establish a grid to describe, analyse and evaluate territorial intelligence projects in order, then it will make the survey of projects.

2.6.2.5. The European Observatory of the Elementary school (WP6E) - Group leader Yves ALPE (OER/UNISA)

The European Observatory of School uses again the general principles that have guided the work of the Observatory of Rural School for more than ten years: multi-discipline research team (geography, sociology, education sciences, psychology..) and multi-category one (researchers and ground actors) and network functioning on remote sites, under the scientific responsibility of the Laboratory ThÉMA/CNRS of the University of Franche-Comté.

The WP6E works examine the feasibility of the extension of such an observatory to several European countries within a network framework. The research problematic concerns the identification of the main parameters that influence the school success and the pupils' orientation of the first and second grade, in perspective with the different types of life territories and the action of the different types of actors of the school life.

The methodology is based on the analysis and interpretation of the school follow-up of significant samples of pupils from different types of geographical environments. The information come from surveys made with the pupils, their parents and their teachers their entire curriculum long. Other information with a contextual nature are gathered, especially on the opening strategies that are implemented by the schools, on the pupils' life territory, on the cultural practices...

All these information feed a database that is made and processed according to the CATALYSE methodology and with its tools.

This methodology implies a permanent link between the ground actors who help to gather information and the researchers who transform them into data and process them. The actors are solicited to participate to the interpretation of the data processing results and at the end of the chain they are information of the results that can influence their practical use.

During the second period, the Wp6e had the following meetings:

2.6.2.5.1. Conference of SALERNO, the 11th and the 12th of May 2007

This conference firstly concerned a critical examination of the Observatory of Rural School experience:

- The Observatory interests and limits
- The contributions of the Catalyse tools

Then, the thinking work concerned a European Observatory of School and the necessary information to develop it :

- General data
- School and territory
- School and community

Lastly, the organisational modalities were defined

- the actors: teams and persons in charge

- the database: forward-looking structure, group's follow-up or comparison according to ages and teaching levels (10 years to completed 15 years – end of the obligatory schooling)
- the users: researchers, institutions, local actors, others.
- the information sources: students, families, staff, schools

2.6.2.5.2. International Conference about Education and territories: contexts, organisations and school trajectory, DIGNE-les-BAINS, 29th and 30th of November 2007.

Once the follow-up of a group composed of 2400 pupils during the secondary school period (panel selected in 6 districts located in the south-eastern France) leading to the creation of an important database and its processing was complete, the OER members wished organize this conference in order to compare their results with studies led in other locations, especially abroad.

The conference gathered 82 attendees including 16 foreign attendees. 31 oral communications were divided into 4 thematic structures :

1. School trajectories and territories
2. European and international comparative approaches
3. Territories as social and cultural contexts for education
4. Territories and contexts: didactical methods and school organisations

It deepened the thinking about territorial contexts. The foreign researchers' mobilisation considerably improved exchanges. It allowed a link with the European Union "Eurosocietal" education. The OER will take part in the Meeting of Barcelona (from the 16th to the 20th of June, 2008) about the training of teachers coming from rural environments.

2.6.2.5.3. National Meeting in VESOUL, the 11th and 12th of December, 2007.

The thematic structure of this meeting about « **Educational policies and rural territories** » corresponds to the research focus that is developed by the OER for ten years:

- Geographical disparities in school success
- Rural environments specificities concerning education and schooling
- Territorial impact of education and school questions

It also corresponds to the CAENTI objectives:

- Research results diffusion to a large public in order to broaden the present network
- Implementation of the tendency "return on actors" of the CATALYSE method
- Taking of important information for the implementation of the Wp6e objectives

The meetings gathered 179 attendees. They consisted of 2 conferences: « What can we learn of 15-20 years of experiences about education policies led in a rural environment ? » and "challenges for the cultural open-mindedness", 10 workshops dedicated to the different facets of the teaching in rural environment about organisation, mobilisation of the different actors, 2 round-table conferences : "Public actors : position, means, competences" and "Public actors, education policies and rural territories : what is gained, how strengthen it, how improve it, what is still to accomplish ?" and a final synthesis provided by a researcher of the INRP.

These days allowed deepening an aspect often neglected about the functioning of the rural school, the one about the action of different actors and about its territorial anchorage.

2.6.3. Deviations from the project work programme

The delay to draft the report will be solved by a delegation of the coordination and redaction tasks.

We noted in the midterm report a difference between the progression rhythms of the coordination groups, which emphasized a tension between researchers and actors. It is now solved. The creation of the coordination group Wp6u solved the problem. We also applied the solution to increase the coordination meetings within the WP6, there the actors will be able to exchange and debate in a deepened way, with the coordination meeting in LIEGE, in February 2008.

2.6.4. List of drafted documents and deliverables of work package 6 TOOLS

Del. n°	Deliverable name	WP n°	Date due	Delivery date	Estim. P/M	Used P/M	Lead contractor
57	European on-line Inclusion Itinerary Accompaniment File with Guidance notes and list of territorial indicators available on internet for comparison with the on-line file data.	6	22	22	16,75	27,58	UFC
58	Specifications for the processing and editorial chain from territorial data to results.	6	22	22	8,50	15,75	UFC
61	Report on feasibility of a European Observatory of the Rural Schools.	6	36		5	1,75	UNISA
						45,08	

Wp6f drafts internal documents which are in appendix of the deliverable n° 57 “Specifications for a European online Inclusion Itinerary Accompaniment File”.

Updated definition of the questions and modalities meanings from the territorial basic information of the Guide within European online Inclusion Itinerary Accompaniment File.

Updated protocols of data analysis for the Guide within European online Inclusion Itinerary Accompaniment File.

ACCEM Experimentation ‘GUION’, document for diagnosis and assessment, with meanings.

ACCEM Data processing and personal data analysis protocols in ACCEM Experimentation.

SIRIA Information system for refugees, migrants and asylum seekers.

Synthesis of the CATALYSE individual documents for diagnosis and assessment of two Belgian territorial observatories: OPTIMA in SERAING and INTEGRA Plus in DURBUY.

Information and indicators organized by blocks in the accompaniment file of ADAPEI and managed by the OSUA system.

Quality recommendations of the "Jardins de COCAGNE" network.

Assessment documents of the "Jardins de COCAGNE" network.

CATALYSE: Manual de Uso para el tratamiento de Datos, ACCEM, diciembre 2006.

GIRARDOT J.-J. (Ed), 2006: “Diagnostic croisé Bistrita (Roumanie) Besançon (France)”, MSHE C. N. LEDOUX.

PASCARU M., 2006: A compared territorial diagnosis BISTRITA – BESANÇON. Methodology, Actors and Results of the CCDT Team

GIRARDOT J.-J. (Ed.), 2006: **Diagnostic de territoire** de la commune rurale de DOUROULA au Burkina Faso, MSHE C. N. LEDOUX

Wp6s drafts technical internal documents used later to write the deliverable n°58 “Specifications for the processing and editorial chain from territorial data to results”:

tia6d080214-OnLineTools-En.ppt

ePragma-070420-MCDphoto.jpg

epragma070827-manuel.pdf

EpragmaRapport.pdf 07/01/08

ePragma-Notice.doc 02/02/08

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jPragma-Problème importation.doc (09/07/07)

Pragma Java_fat.jar (10/02/08)

Pragma.script (10/02/08)

Anaconda

Anaconda 2.0.jar

2.6.5. List of work package 6 next deliverables and milestones

Del. No	Deliverable name	WP n°	Lead participant	Estimated person months	Nature	Dissemination level	Delivery date
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

Next milestones:

- Coordination meeting of the leaders of Work packages and coordination groups, end April 2008, BESANÇON (France)
- Coordination meeting of WP4, with Wp6i and Wp6s, end May, PECS (Hungary)
- Coordination meeting of WP6, end June 2008, BESANÇON (France)
- Coordination meeting of WP6, beginning of September 2008
- Intelligence Conference in BESANÇON, October 2008.

2.6.6. Conclusion and prospects of work package 6 TOOLS for next period

According to the EU policies, the WP6 aims at designing and coordinating the implementation and the documentation of friendly tools, so as to help the actors of territorial sustainable development to elaborate, manage, observe, evaluate and transfer participative projects in multi-sector partnerships. It 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, strongly contributes to the CAENTI global objective.

In 2006, the WP6 defined the specifications of a CATALYSE Toolkit, on the basis of the CATALYSE method. CATALYSE has been using for several years since 1989 by most of the CAENTI participants in multi-sector observatories. The latter ones use similar tools but they collect and process different information contents. The toolkit gathers a harmonize guide for diagnosis and assessment, a service repertory and a selection of territorial indicators with tools for quantitative, qualitative and spatial analysis.

In 2007, the WP6 initiated many projects and technical developments that leded to products. It began to integrate the CATALYSE tools and make their access on Internet easier. It drafted:

- The specifications of the file, an online “Inclusion Itinerary Accompaniment File”.
- The specifications for the processing and editorial chain from territorial data to results.

It also enlarged its research activities towards:

- The coordination of the CATALYSE Toolkit execution.
- A more global survey and experimentations about the uses of territorial tools in development partnerships.

After the design of the CATALYSE Toolkit, the WP6 drafted the specifications of these tools integration at an upper level, online, in a TICS designed from the actors needs and uses. It started writing the specifications for more friendly, free, multi-platform and multi-language versions, and it focused its activity on the online versions in the prospects of the TICS.

As a consequence, the CATALYSE toolkit and the SCIT will offer a complete set of statistical and spatial analysis tools that will be accessible online when the actual prototype will be tested, what is done in ACCEM experimentation in particular.

In 2008, WP6 planned

- To design a specialized portal on European Institutional Indicators which are useful for the end actors, in Wp6i;
- To integrate them with analysis tools in the Territorial Intelligence Community Systems, in Wp6s.

The new coordination group Wp6u will have to organize the inventory of all the territorial intelligence development partnerships in Europe and to coordinate experimentations.

WP6 will be the convergence point for all the activities developed by the CAENTI from its beginning in March 2006.

Wp6i will concretise the research activities of the coordination groups Wp4i on territorial information and Wp4c on competitiveness indicators.

In Wp6s, the TICS modelling will be made according to four axes. It allows jointly designing:

- The integration of the analysis functions of the territorial information from Wp6d in relation with the Wp4m on scientific methods and Wp4t about territory;
- The modelling of the territorial information analysis protocol, according to the documents specification drafted by the Wp6d (guide, service repertory) with Wp4i (territorial indicators) and by the Wp6f (file). We need to update the guide according to file specifications and the results of experimentations. It also depends on the integration and tools lining.
- The specifications of the editorial and documentary chain will implicate the specifications of the latter documents and information, as well as the modelling of the territorial community uses (Wp6u = Wp6d + WP4p + WP5). It will be the convergence place of the CAENTI activities.
- The Portal of Territorial Indicators integration.

Wp6s will program an online version of ANACONDA, eanaconda.

Tool by tool, there are the specific prospects we have for this year to come:

jPRAGMA:

- Database stabilization (compatibility with ePragma);
- To finalise the integration with Anaconda-Nuage;
- To finalise the multilingual management;
- Complex quantitative calculation;
- Specific functions (synthesis variable);
- To improve the interfaces and proceedings;
- To develop an automatic set up module;
- To write the final documentation.

Epragma:

- Database stabilization (jPragma compatibility);
- Integration with Anaconda-Nuage;
- Multilingual management;
- Easy and complex quantitative calculation;
- Specific functions (synthesis variable);
- Interfaces and proceedings;
- Imports and exports to validate;
- Integration into a CMS (Content Management System);
- Automatic set up module.

Anaconda:

- To continue the interface improvement;
- To product several files in a stand-alone version;
- To transform the classification tree (cluster) in an interactive way;
- Integration with jPragma.

Catalyse CMS:

- To organise the link with wp6i and wp6s;
- To rewrite the first specifications in order to elaborate the integration into a CMS (link with wp3);
- To develop the integration of each tool in a new way to think about the activity of an observatory in a real SCIT.

Catalyse CMS will integrate more online services:

- A website based on Catalyse experiment, and actors' specification;
- A repertory of territorial actors and service;

- A thematic library;
- A territorial information system with an access to the portal of European indicator;
- A specific ePragma including the European guide;
- A transparent integration of the treatment tools: eAnaconda and Nuage into one online global tool.

A download area will get the complete access to the Catalyse toolkit outline: Pragma in java version, Anaconda, the European guide, the manuals and the documentation (modelling of our current Catalyse blog).

The new coordination group “Wp6u” suggests:

- Enlarging the study of the CAENTI projects;
- Joining to this study the survey of the projects funded by the EU and which are relevant in the territorial intelligence field identified by Wp4p;
- Joining too the research actions experiences the WP5 studied within the framework of the catalogues of experience.

This new coordination group will draw a panorama of the territorial intelligence uses in the development partnerships, in coordination with other WP that will analyse the data the Wp6u will gather, according to their particular aim and topic.

The Wp6u will draw a European map of the territorial intelligence actions. It will establish a specific description grid for the diagnosis actions, the maps, the observatories and the development partnerships, from technical and governance points of view.

Wp6u will also coordinate:

- The progress of the CATALYSE Toolkit that will be integrated into the CATALYSE CMS.
- The experimentations in Spain with ACCEM and in CHAPELLE-LES-HERLAIMONT.

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