

TERRITORIAL APPROACH TO DEVELOPMENT AND ITS SOCIAL DIMENSION: Methodological Proposal for Measurement

<http://dx.doi.org/10.21527/2237-6453.2023.59.14532>

Received: 24/5/2023

Accepted: 1/7/2023

Aurea Andrade Viana de Andrade,¹ Edeimar Rotta,²
Tiago Roberto Alves Teixeira,³ Maria das Mercês Cabrita de Mendonça Covas,⁴
Diomar Augusto de Quadros,⁵ Vinicius Tiago Schmitt⁶

ABSTRACT

The social dimension encompasses the different relationships and structures formed by human beings in the interactions they establish among themselves and with nature. In this article, the aim is to deepen discussions about the social dimension, based on a territorial approach to development. The theoretical-methodological assumptions guiding the reflection on the central components of the social dimension are presented: labor relations and access to goods and services produced in societies; the forms of organization and interaction that characterize various specific societies; and the values, norms, and social structures of societies. The text is organized into two sections: in the first, the components are detailed, the variables capable of demonstrating the basic aspects of each component are delimited, and the instruments proposed for the data collection on each chosen variable are indicated; in the second, the scale of measurement for the activation of territorial heritage is presented, as well as the Social Dimension Index. Reflection on the social dimension in studies focused on territorial heritage highlights the need to work with large components and variables, using an interdisciplinary, multidimensional, and multi-scalar approach, attentive to the major transformations in global societies and able to perceive the manifestations of different actors and the design of various scenarios.

Keywords: Territorial heritage. Social dimension. Methodology. Social Dimension Index.

ABORDAGEM TERRITORIAL DO DESENVOLVIMENTO E SUA DIMENSÃO SOCIAL: PROPOSTA METODOLÓGICA PARA MENSURAÇÃO

RESUMO

A dimensão social compreende as diferentes relações e estruturas constituídas pelos seres humanos nas interações que estabelecem entre si e com a natureza. No artigo busca-se aprofundar as discussões sobre a dimensão social, a partir da abordagem territorial do desenvolvimento. Apresenta-se os pressupostos teórico-metodológicos que orientam a reflexão em relação aos componentes centrais da dimensão social: as relações de trabalho e acesso aos bens e serviços produzidos nas sociedades; as formas de organização e interação que marcam as diversas sociedades específicas e os valores, normas e estruturas sociais das sociedades. O texto está organizado em duas seções: na primeira, busca-se detalhar os componentes, delimitar as variáveis que são capazes de demonstrar os aspectos básicos de cada componente e indicar os instrumentos propostos para a coleta dos dados a respeito de cada variável escolhida; na segunda, apresenta-se a escala de mensuração da ativação do patrimônio territorial, bem como o Índice da Dimensão Social. A reflexão sobre a dimensão social, em estudos centrados no patrimônio territorial, evidencia a necessidade de se trabalhar com grandes componentes e variáveis, a partir de uma abordagem interdisciplinar, multidimensional e multiescalar, atenta às grandes transformações nas sociedades mundiais e capaz de perceber as manifestações dos diferentes atores e o desenho dos diversos cenários.

Palavras-chave: Patrimônio territorial. Dimensão social. Metodologia. Índice da Dimensão Social.

¹ Corresponding Author: Universidade Estadual do Paraná. Campo Mourão/PR, Brasil. <http://lattes.cnpq.br/2843549171290076>. <https://orcid.org/0000-0003-3550-5933>. aureavgeo@yahoo.com.br

² Universidade Federal da Fronteira Sul – UFFS. Cerro Largo/RS, Brasil. <http://lattes.cnpq.br/9661112584933921>. <https://orcid.org/0000-0003-1608-7078>

³ Northumbria University. Newcastle, Reino Unido. <https://orcid.org/0000-0003-3920-2921>

⁴ Universidade do Algarve – Ualg, Portugal. <http://orcid.org/0000-0002-3531-8444>

⁵ Universidade Federal do Paraná – UFPR. Matinhos/PR, Brasil. <http://lattes.cnpq.br/7835112618739825>. <https://orcid.org/0000-0003-0714-4077>

⁶ Universidade Federal da Fronteira Sul – UFFS. Cerro Largo/RS, Brasil. <http://lattes.cnpq.br/7601086165945884>. <https://orcid.org/0009-0001-9401-1522>

INTRODUCTION

When we talk about the social dimension, we are talking about the elements that characterize the relationships and structures constituted by human beings in the interactions they establish with each other and with nature. Costa Pinto (1986), when reflecting on the object of study of sociology, gives us an important clue as to what the social dimension is. He refers to the concern with formation (how societies are born and in what context they are established), organization (how individuals create relationships, establish rules and norms of coexistence, shape customs, organize institutions, manage conflicts and contradictions), and the transformation (the permanent process of living the tensions, contradictions, conflicts, changes) of different societies. Bourdieu (2007), when reflecting on habitus, one of the central elements of his theory of action, gives us another important indication for understanding the social dimension, pointing to not only objective but also symbolic aspects that build and shape “structured structures” that tend to function as “structuring structures”.

It is necessary to make it clear, at the beginning of this article, that reflection on the social dimension of the territory does not mean that it can be isolated from the totality, but rather that it can be scrutinized, with due scientific rigor, in the sense of better understanding it. Understanding the totality is what gives meaning to its multiple dimensions and scales. However, the totality cannot be understood without an analytical look, with the magnifying glass of science, in the sense of explaining its constitutive characteristics. As Edgar Morin (2005, p. 75) rightly states: “I cannot conceive the whole without the parts and I cannot conceive the parts without the whole [...]; that what is acquired in the knowledge of the parts turns on the whole”; and that “one can enrich the knowledge of the parts by the whole and of the whole by the parts, in the same movement that produces knowledge”.

Based on this understanding and the ontological, epistemological, theoretical, and methodological assumptions that guide the research project (DALLABRIDA, 2020; DALLABRIDA, ROTA, BÜTTENBENDER, 2021; DALLABRIDA et al., 2021) on which we are working, the group of researchers involved with the study of the social dimension understands that it should be characterized from three essential components: (i) labor relations and access to goods and services produced in societies; (ii) the forms of organization and interaction that mark the different specific societies; and (iii) the values, norms and social structures that “shape” and give consistency to different societies. The potentialities and limits of this option are kept in mind, but science is also made of options, which are never closed, but rather open to criticism and new elaborations.

This article aims to clarify what is meant by the social dimension within the scope of the proposal for studies on the territorial approach to development, namely: (i) detailing the components that the study group on the social dimension considers to be essential for its explanation; (ii) delimiting the variables that are able to demonstrate the basic aspects of each component; (iii) indicating the proposed instruments for data collection regarding each chosen variable; and (iv) proposing a scale for measuring the activation of territorial heritage, in each variable and as a whole, contributing to the construction of the Multidimensional Index of Territorial Heritage Activation (*Índice Multidimensional de Ativação do Patrimônio Territorial - IMAPI*), resulting from the aggregation of the six dimensions proposed in this collective research effort.

The text is structured in two sections, in addition to this introduction and the conclusion. In the first one, the essential components of the social dimension are presented, pointing out its theoretical-conceptual elements, the constitutive variables, the possible collection instruments, and the measurement proposal. The second section presents a synthesis of what could be called a proposal for aggregation, providing an overview of the social dimension in studies of territorial heritage. This option is made to establish a sequential reflection, with linked arguments that facilitate the internal logic and allow the reader to understand the path taken by the group.

However, it is clear that, just as one cannot understand the social dimension detached from the social totality, one cannot understand each of these components detached from the social dimension as a whole either. This is an exercise in “separation” to better clarify and facilitate understanding.

ESSENTIAL COMPONENTS OF THE SOCIAL DIMENSION: THEORETICAL-CONCEPTUAL ELEMENTS, CONSTITUTIVE VARIABLES, COLLECTION INSTRUMENTS AND MEASUREMENT PROPOSAL

When talking about essential elements of the social dimension in studies of territorial heritage, it is clear that the option of the group studying this dimension took as reference the ontological, epistemological, theoretical and methodological contributions that guide the research project “territorial heritage as reference in the development process of territories or regions” (DALLABRIDA; ROTTA; BÜTTENBENDER, 2021; DALLABRIDA et al., 2021; ROTTA et al., 2022;), based on the following epistemic fields: (i) the New Theory of Systems; (ii) Complexity Theory; (iii) Historical-dialectical Materialism; (iv) and the Perspective of Decoloniality and Decentralization.

Labor relations and access to goods and services

This subsection aims to explain the first component of the social dimension: labor relations and access to goods and services. It is organized into two main parts. In the first part the ontological, epistemological, and theoretical contribution is developed, explaining the main theoretical-analytical concepts of reference for the analysis of labor relations in the territorial dynamics of development. In the second part, three variables are presented as important additional elements to analyze labor relations and access to goods and services in Brazil.

The capitalist mode of production is based on private ownership of the means of production, where it is necessary to produce goods to be made available on the market. In this mode of production, labor is a central component. It is through work that human beings modify the raw material extracted from nature to transform it into products. As Marx theorized, each society has labor relations based on different forms of division, organization, regime, and labor techniques. In capitalism, as is well known, labor relations are relations that occur between two forces: the capitalists, who own the means of production, and the workers, who do not own such means (PATTENDEN, 2016; BAGLIONI, 2018).

In this context, work relations and access to goods and services (or consumption) have an intrinsic connection and proximity. Durable or non-durable goods and services, as well as access to such goods, are nothing more than products of labor relations. Labor is necessary for

producing, distributing, and marketing commodities, but it is also necessary for wage workers to consume them. This involves extensive work relationships inside and outside companies and, although such work relationships have an appearance of neutrality, in fact, these are marked by contradictory and power relationships (SMITH et al., 2018).

On the one hand, for capitalists to remain competitive and maximize their profits, they seek to exploit workers as much as possible, paying low wages and intensifying working hours to increase productivity/production. To this end, capitalists use different tools such as outsourcing production (or even outsourcing outsourcing), hiring informal workers, expanding subcontracting, or practices within companies to expand control over workers, thus increasing productivity. On the other hand, workers seek to reverse this scenario of exploitation, claiming better wages and working conditions, often through strikes. Therefore, work relationships are contradictory and based on abusive relationships (SMITH et al., 2018).

A problem generated by such a contradiction (increasing production/productivity versus decreasing wages) is that most workers end up having limited and precarious access to consumer goods and services (BRASIL, 1998). In addition, the capitalist mode of production is vulnerable to overproduction crises, since workers who consume such goods do not have the purchasing power to consume at the same speed as production (HARVEY, 2005). It is worth mentioning that this contradiction is more aggravating in the countries of the global south, also called peripheral countries, due to their historical dependency relationships in relation to the central countries of the global north.

This fact has been aggravated, in the last four decades, with the intensification of globalization and neoliberal policies. In Latin countries like Brazil, job insecurity, unequal distribution of income, and access to goods and services are some of the many problems that plague us. Specifically, access to goods and services considered vital has often been made impossible by economic policies that refuse to recognize the basic right of citizens to have access to the minimum. Faced with these challenges and realities, this section analyzes labor relations and access to goods and services, in specific territories, according to the theoretical approach conceptualized as the “regime of local labor control” (JONAS, 1996).

As pointed out earlier, work relationships are contradictory. Therefore, at the same time that capitalists seek to maximize their profits, exploiting workers, such capitalists need to maintain certain social levels in local territories so that workers are “appeased” (JONAS, 1996). While capitalists have control of workers within productive plants, the same cannot be said in the spheres of consumption and reproduction.

Therefore, to guarantee accumulation and stability, capitalists create, in local territories, a “local labor control regime”, that is, institutional structures and practices that promote reciprocities between the spheres of production, consumption, and reproduction (JONAS, 1996). A “local labor control regime” aims to facilitate workers’ access to production sites in the labor market; reproduce productive workers; coordinate wage and consumption standards; and, finally, facilitate capital accumulation. Therefore, a “local labor control regime” aims to encourage workers’ participation in accordance with existing labor relations, but also to mold and produce workers and insert them into the work process (JONAS, 1996).

An example of this approach is the study by Smith et al. (2018) on the clothing production sector in Moldova. The author demonstrates how neoliberal policies in that country, as well

as the state strategy of connecting local clothing producers with buyers in Western Europe, resulted in a local labor control regime marked by precarious labor relations and a lack of access to goods and services. This is because European buyers led such clothing producers to adopt a new productive structure based on pre-established contracts with low prices and short production time, which affected labor relations and the ability of workers to socially reproduce. Smith et al. (2018) point out that such factories pay minimum wages as a rule, with extra payments as bonuses according to the number of parts produced by each worker. This leads workers in such companies to live below the poverty line or to work multiple shifts to achieve a minimum level of access to goods and services. Another problem is the high number of informal workers, mostly women, who accept such conditions to avoid wage reductions due to taxes.

In this scenario, it is understood that the analysis of the social dimension, in the territorial dynamics of development, with regards to labor relations and access to goods and services, needs to have at least three variables as a reference: (i) the situation of the formal and informal work; (ii) income distribution among classes or class strata; (iii) social vulnerability indicators.

As for the first variable, which refers to the *Situation of formal and informal work*, it is suggested that secondary quantitative data be collected regarding the significance of the formal and informal sectors in a given territory and economic sector. In the case of the formal sector, it is proposed to have as reference elements such as activity, income, working hours, schooling, and gender. The General Registry of Employed and Unemployed People (*Cadastro Geral de Empregados e Desempregados - CAGED*)⁷ provides us with the main information to measure the fundamental characteristics of the labor market. Data on levels of formal employment are important to measure the working conditions of a territory and the type of work relationships existing there. As it is known, rising unemployment results not only in an increase in informal work but also in a greater precariousness of labor relations (MATTEI; HEINEN, 2018).

As for the informal sector, attention is recommended to the following categories: informal self-employed; informal workers in formal and informal enterprises, but employed due to family relationships; informal workers exercising their functions in informal or formal companies; and formal companies that employ informal workers to evade taxation (CHEN, 2012). It is suggested to analyze the informal sector as a result of a process of dispossession – that is, unemployment generated by cyclical crises that supply the industrial reserve army pointed out by Marx – and of repossession, a process that allows capitalists to be able to reinvest their accumulated capital (MILLAR, 2007).

As previously mentioned, it proposes to analyze the informal economy of a territory in conjunction with the formal economy. This is because, as Millar (2007) pointed out, in the capitalist system, informal workers are of crucial importance to the formal sector, as they provide goods at extremely low costs so that low-paid formal workers can survive on a minimal income. Thus, both are connected and it is important to analyze them together.

⁷ In the case of territories in which CAGED is not available, data on the “proportion of employed persons in relation to the total population” can be used as a proxy, as established by the Brazilian Institute of Geography and Statistics (IBGE, 2023). In this case, it is suggested to consider optimal (5) when the indicator is above 35%; good (4), between 30 and 35%; regular (3), between 25 and 29%; bad (2), between 20 and 24%; and very bad when the indicator is below 20%.

For this analysis, a five-level scale⁸ is established, which considers as (5) optimal (in full conditions of activation of the territorial heritage), a territory that has from 80 to 100% of the economically active population (EAP) exercising activities in formal work; as (4) good, from 60 to 79%; as (3) regular, from 50 to 59%; as (2) bad, from 40 to 49%; and as (1) very bad, when it is below that, between 1 and 49%. It is based on the understanding that access to the formal labor market presents better conditions for guaranteeing rights and institutionality of productive processes, contributing to generating more dynamic and developed territories.

As for the second variable, Income distribution between classes or class strata, the use of the Gini Index is suggested as a fundamental reference, as it is capable of showing the evolution of the degree of income concentration in a country, region, or municipality over the years (the index varies from 0 to 1, the closer to one, the higher the income concentration) (NEVES et al., 2016). Therefore, such an index allows researchers to identify whether the study area has witnessed, over the years, an increase in income inequality.

The Gini Index can be used as an initial step for qualitative research on the possible political and economic actors (or policies) generating such inequality and how this has impacted labor relations, wage relations, and, consequently, access to goods and services. Researchers have shown that municipalities with a lower degree of income concentration normally have a higher level of education and higher wages. Analyzes can also be focused on identifying how the concentration of income, in certain municipalities, differently affects women, migrants, and Afro-descendants (NEVES et al., 2016).

In this case, a scale is proposed that also has five levels. It is understood as optimal (5) when the Gini Index is from 0 to 0.30, equivalent to those presented by most of the countries that occupy the best positions in terms of Human Development; good (4), when it is between 0.31 and 0.40; regular (3), when it is between 0.41 and 0.50; bad (2), when it is between 0.51 and 0.60; and very bad (1), when it is above 0.61. It is understood that a more equitable distribution of income between classes and class strata tends to favor the dynamics of activation of territorial heritage, as it provides greater possibilities of access to basic goods and services and the exercise of substantive freedoms (SEN, 2000).

Finally, the third variable of the analysis of labor relations and access to goods and services proposed is the *Social Vulnerability Indicators*. These indicators can be measured through the Social Vulnerability Index (*Indicadores de Vulnerabilidade Social - IVS*)⁹. In countries of the global south such as Brazil, despite the existence of public initiatives aimed at reducing unemployment and precarious work relationships, there is still a high proportion of workers in vulnerable situations (PRONI, 2013). The IVS is an indicator that demonstrates the level of social vulnerability of a place (very low to high social vulnerability, 0-1), and has been used as a way to guide public managers in the design of public policies in tune with the reality of municipalities (IPEA, 2015). The concept of social vulnerability has a consolidated tradition in

⁸ At the end of this chapter, a summary table is presented in which components, variables, collection instruments, and scales are visualized as a whole for the entire social dimension.

⁹ In territories where the IVS indicator is not available, the “percentage of the population with nominal monthly per capita income of up to ½ minimum wage”, measured by the IBGE, can be used as a proxy. An optimal level (5) is considered when this percentage is below 15%; good (4) between 15 and 20%; regular (3) between 21 and 30%; bad (2) between 31 and 40%; and very bad (1) when it is above 40%.

national and international literature, especially in the social and applied social sciences, as a perspective to broaden the understanding of the phenomenon of poverty beyond the monetary income dimension, indicating the absence and/or insufficiency of conditions for individuals and populations to achieve basic well-being in a given territory (COSTA et al., 2018).

The IVS is generally calculated based on urban infrastructure, human capital, and labor income (IPEA, 2015). For example, the IVS allows researchers and political managers to identify municipalities and/or territories that are in a vulnerable situation in terms of income and work and, in this way, they can discuss territorial development policies, based on the local reality, in the sense of improving this condition (RAMOS; COSTA, 2018).

In the case of this variable, it is proposed to work with a five-level scale as well. In the best of them, considered optimal (5) if there are territories that have a very low IVS, between 0 and 0.200, a reality present in countries with better Human Development indicators; at the good level (4), those with low IVS, from 0.201 to 0.300; at the regular level (3), those with an average IVS, between 0.301 and 0.400; at the bad level (2), those with an IVS between 0.401 and 0.500; at the very bad level (1), those with a very high IVS, between 0.501 and 1. It is understood that social vulnerability is one of the basic indicators of social inequality and the inability of the State to create social programs capable of generating inclusion, strengthening social bonds, and promoting equity.

Table 1 gives us an overview of the proposition related to the component “labor relations and access to goods and services”.

Table 1 – Labor relations and access to goods and services

Social Dimension			
Component	Variables	Tools for data collection	SCALE - (1 to 5)
Labor relations and access to goods and services	Formal and informal labor	- General Registry of Employed and Unemployed People (CAGED)	5: 80 to 100% of EAP (optimal) 4: 60 to 79% of EAP (good) 3: 50 to 59% of EAP (regular) 2: 40 to 49% of EAP (bad) 1: 1 to 39% of EAP (very bad)
	Income distribution between classes or class strata	- Gini Index	5: 0 to 0,30 (optimal) 4: 0,31 to 0,40 (good) 3: 0,41 to 0,50 (regular) 2: 0,51 to 0,60 (bad) 1: 0,61 to 0,80 (very bad)
	Social Vulnerability Indicators	- Social Vulnerability Indicators - IVS	5: 0 to 0,200 – very low (optimal) 4: 0,201 to 0,300 – low (good) 3: 0,301 to 0,400 – average (regular) 2: 0,401 to 0,500 – high (bad) 1: 0,501 to 1 – very high (very bad)

Source: Organized by the authors.

Forms of organization and interaction

In this subsection, a comprehensive, open, and plural approach is made to the social dimension and its importance in the territorial dynamics of development, regarding forms of organization and interaction, in the historical moment in which we find ourselves. It is structured

in two main parts, the first of which, more than a theoretical narrative, seeks to account for a historical emergence, namely, the great epistemological and paradigmatic transformation (KUHN, 2021) that the great transitions underway impose and impact us, precisely, on the forms of organization and interaction that act on the territorial dynamics of development.

In the second part, three variables are schematically presented as important additional elements to analyze the forms of organization and interaction in Brazil: (i) Social groups and organized class strata; (ii) Relationship networks; and (iii) Forms of cooperation and association.

Regarding the first part, it is imperative to note the importance of the context and the historical moment in which we move. The major transitions that will take place from the beginning of this 21st century to 2050, as a result of decarbonization, digitization, migratory flows, and socio-labor intermittence, impose a complex approach to the social construction of reality (BERGER; LUCKMANN, 2010). That is, they impose an interdisciplinary attitude that introduces us to the revolution of the new economy (RIFKIN, 2001) and a new sociology of knowledge (BERGER; LUCKMANN, 2010).

Firstly, in terms of globalization, three dimensions of analysis seem to be fundamental: i) the state of the international and multilateral order, ii) the provision of global public goods (there is a serious deficit in supply), and iii) regulatory policy (at a difficult time, as observed at the United Nations Conference on Climate Change - COP26). These three dimensions of analysis have a direct impact on the regulation of socioeconomic, sociocultural, and socioenvironmental interactions that directly interfere with the dynamics of different societies in their specific environments.

Secondly, major transitions increase the complexity and diversity of interactions, that is, the asymmetric effects; the imponderables of chance; paradigm shifts, which need to be observed and monitored to prevent negative impacts on the economic; social; and environmental cohesion of territories. The different territories, with their integrated and specific dynamics, become permanent challenges of understanding for social scientists interested in their study, demanding diverse, interdisciplinary logic and permanent interaction and dialogue.

Thirdly, it is essential to avoid aggravating social inequality, which will increase if the first two analytical plans are not properly addressed. In this matter, three instruments are decisive at the territorial level to prevent those effects: local productive arrangements, collaborative networks, and decentralized territorial cooperation (ie, creating network territories) (COVAS; COVAS, 2014). These instruments function as preventive cushions against social inequality due to their proximity to the origin of social problems. The three dimensions mentioned above – globalization, major transitions, and inequality and social polarization – will always be present in the analysis of the three variables described below, in the second part of this section.

Bearing in mind these epistemological, theoretical, and methodological challenges that permeate the understanding of the social dimension in this second component (forms of organization and interaction), we will now explain the three variables that we propose to research to clarify it: (i) Organized social groups and class strata; (ii) Relationship networks; and (iii) Forms of cooperation and association.

The first variable seeks to identify which *Social groups and organized class strata* are present in the territory. Denardin (2016) states that there are two “pillars of territorial development”: territorial resources, tangible and intangible; and the actors (private, public, or

associative) and their different modes of coordination that aim to solve productive problems inherent to the territory. It is about contributing to reveal, in a special way, this second pillar. Another concern is to identify the most disadvantaged social groups and class strata, as they tend to experience asymmetrical power relations in comparison with the others. For this, it is essential to bear in mind the four most critical levels of inequality: large metropolitan areas, small and medium-sized urban communities, rural communities, and communities of traditional peoples (HAESBAERT, 2021).

As instruments for data collection, it is proposed to use the registration of entities, via consultation of active CNPJ headquartered in the territory, especially to capture those formally constituted; and the application of a structured questionnaire, with non-probabilistic sampling, aiming to also capture non-formal entities existing in the territory. This questionnaire will be adapted, having as reference the Integrated Questionnaire to Measure Social Capital (*Questionário Integrado para Medir Capital Social - QI-MCS*)¹⁰ (GROOTAERT et al., 2003; GROOTAERT; NARAYAN; WOO, 2004), highlighting the aspects related to the dimensions “groups and networks”; and “authority”; and “political action”.

This variable proposes a scale organized into five levels, based on the idea that formal and informal organizations are essential to generate links and mobilization capacities, activating the potential of individuals, organizations, societies, and territories. In this sense, it will be considered at an optimal level (5), when 90 to 100% of the individuals who respond to the structured questionnaire present, at least, a connection with formal or informal organizations that represent their group, class, or class interests; good level (4), when a connection is found in 70 to 89% of individuals; regular level (3), between 50 and 69%; bad level (2) when a connection is found in only 30 to 49% of individuals; and very bad (1) when it is less than 30%.

The second variable, Relationship Networks, seeks to account for the identification of formal and informal networks existing in a given territory. It is about perceiving the fabric of the bonds between people who come together because they share common identity characteristics, such as family, neighborhood, friendship, community, religion, culture, work, and leisure, among others. As well as capturing how these networks of interpersonal relationships are entangled with the network of institutional and inter-institutional relationships. In Coleman’s view (1990), social capital is not located in individuals, but in the relationships that are established between them, which enhances their actions to the extent that it expands the resources available to them. Putnam (2002) also highlights the importance of social networks and the norms of reciprocity associated with them as essential elements in defining the social capital of a given territory.

In the context of a complex society in a constant process of transformation, the challenges that arise cannot be restricted to the understanding of existing relationships, but also that they are capable of envisioning the transition processes and the novelties they generate, in the sense

¹⁰The Integrated Questionnaire to Measure Social Capital (QI-MCS) is a tool developed by the Thematic Group on Social Capital of the World Bank in order to indicate a set of essential questions for all those interested in generating information on the various dimensions of social capital. The questionnaire points to six dimensions: groups and networks; trust and solidarity; collective action and cooperation; information and communication; cohesion and social inclusion; and authority and political action. It has been field tested in several countries and has generated several studies with adaptations to specific territories (ANÉSE, 2009).

of identify possibilities and opportunities, converting them into territorial assets, generators of new dynamics or collective actions on a territorial basis (DIAS; SILVEIRA, 2007). In terms of critical theory, the great transitions of the next decade oblige us to reconsider social relations, and therefore, whenever possible, an observatory of social innovation should be created to equate a more complex approach to relationships network as a result of these major transitions (INNERARITY, 2010).

To identify this set of networks of relationships, it is proposed to apply a structured questionnaire, adapted from the Integrated Questionnaire to Measure Social Capital (QI-MCS), emphasizing its first two dimensions: networks and relationships; and trust and solidarity. This information gathered by the structured questionnaire can also be complemented by carrying out a semi-structured interview and “in loco” visits, especially to capture relationships and networks that are not explicitly manifested, for different reasons.

The representation of this variable will be based on a five-level scale, considering the density of existing networks in the territory and the participation of individuals in them. At an optimal level (5), when 90 to 100% of the individuals who respond to the questionnaire or are interviewed state that they are satisfied with the existing relationship networks in their territory; good level (4), when this satisfaction is 70 to 89% of individuals; regular level (3), between 50 and 69%; bad level (2) between 30 and 49% of individuals; and very bad (1) when it is less than 30%.

Forms of cooperation and association constitute the third variable that is important to characterize. In this case, it is necessary to distinguish, on the one hand, the already institutionalized networks of relationships, and, on the other hand, the dynamics of social relationships that function on the margins of the social system of each specific territory. Cazella and Carrière (2006) state that development dynamics cannot be installed in a given territory without the creation or reinforcement of existing networks and the emergence of new forms of cooperation. Territorial development presupposes cooperation between actors in the search for points of convergence that drive them to action. This does not imply the suppression of diversities and differences, but rather the capacity for dialogue and moderation in pursuit of common goals. Boisier (1997), in turn, reaffirms that civil society, including local forms of solidarity, cooperation, and social integration, is the main agent of the socio-economic transformation of a given territory.

In this context, the identification of the main forms of cooperation and association acquires a special relevance as their connection to public goods and collaborative common goods grows (CORIAT, 2015). In a time of privatization of the territory, in which the forms of interaction and solidarity are significantly reduced, it is necessary to reaffirm and/or reinvent forms of cooperation and association, through clubs of producers and consumers, cooperatives of common work, spaces co-working, startup incubators, environmental and cultural associations, among others. All these organizations can establish networks of innovative relationships supported by technological and digital devices of decentralized cooperation (COVAS, 2021; DALLABRIDA; COVAS; COVAS, 2017; INNERARITY, 2010). The first task, in each case, consists of finding the concertation mechanism or social platform that will promote the dialogue/negotiation between the parties and, afterward, the public policy measures and the most adjusted solutions to each social group (INNERARITY, 2009).

Another important aspect that deserves special attention in the analysis of forms of cooperation and association is the characterization of the main conflicts present in a territory. Conflicts are part of social dynamics, old and new, as a result of processes of change and/or social transformation. Generally, conflicts can be identified according to four main types: i) those of a corporate nature, due to conflicts of interests, classes, class strata, and specific social groups; ii) those arising from failures in technological innovation (digital illiteracy); iii) those that happen due to gaps in public policy; and iv) those that emerge, most likely, from the accumulation of the first three types of conflicts. In addition, there are still additional difficulties that relate to multiscalar (territories at different scales of administration) and communication difficulties.

In order to identify this complexity of forms of cooperation and association, it is proposed to apply a structured questionnaire, adapted from the Integrated Questionnaire to Measure Social Capital (QI-MCS), with emphasis on dimensions 2, 3, 5 and 6 of the same, the namely: “trust and solidarity”; “collective action and cooperation”; “cohesion and social inclusion”; and “authority and political action”. It will be considered at an optimal level (5), when 90 to 100% of the individuals who respond to the questionnaire participate, voluntarily, in at least two formal or informal organizations based in the territory; good level (4), when bonds are found in 70 to 89% of individuals; regular level (3), between 50 and 69%; bad level (2) when bonds are found in 30 to 49% of individuals; and very bad (1) when it is less than 30%.

Table 2 presents a summary of this second component of the social dimension, with its variables, collection instruments, and proposal for a possible measurement index.

Table 2 – Forms of organization and interaction

Social Dimension			
Component	Variables	Tools for data collection	SCALE - (1 to 5)
Forms of organization and interaction	Organized social groups and class strata	- Structured Questionnaire	5: 90 to 100% (optimal) 4: 70 to 89% (good) 3: 50 to 69% (regular) 2: 30 to 49% (bad) 1: Below 30% (very bad)
	Relationship networks	- Structured Questionnaire - Semi-structured Interview - “In loco” visit	5: 90 to 100% (optimal) 4: 70 to 89% (good) 3: 50 to 69% (regular) 2: 30 to 49% (bad) 1: Below 30% (very bad)
	Forms of cooperation and association	- Structured Questionnaire	5: 90 to 100% (optimal) 4: 70 to 89% (good) 3: 50 to 69% (regular) 2: 30 to 49% (bad) 1: Below 30% (very bad)

Source: Organized by the authors.

VALUES, NORMS, AND MORALS AND INSTITUTIONAL DENSITY

This section proposes to explain the third essential component of the social dimension, approaching analytical and conceptual elements of human values, based on conflicts, contradictions, or socially shared, and how these values are intertwined with norms in the constitution of

the social structure. In this sense, in approaching the social dimension, identifying actors, class interests, historical processes, and especially understanding the social structure, that is, how society is organized are essential for territorial studies. The section is divided into two parts. In the first the ontological, epistemological, and theoretical assumptions of the basic concepts for the analysis of Values, norms, and social structures are discussed. In the second part, three variables schematically fundamental for the analysis of this component of the social dimension are presented: (i) Values; (ii) Rules and morals; and (iii) Institutional density.

It should be noted that at the core of societies, there is a set of values, or “codes of conduct” to which subjects or social groups are subordinated. However, in capitalist society, social relations are marked by different types of conflicts, contradictions, and class disputes. These values also play a decisive role in social praxis. Therefore, the hegemony of dominant values (of classes or groups) influences, in a way, the population to act in the territories according to their beliefs and interests, especially economic and political ones. Therefore, they create an abstract perception of supposedly universal values.

Human values, one of the central themes in the social sciences, gained notoriety with Rokeach’s (1979) value system studies, especially from the 1960s onwards. In an attempt to explain human standards, the author states that subjects, groups, norms, as well as behaviors, are often established by universal value orientations. For Rokeach (1979), a value system consists of a hierarchical arrangement of values, categorized in a space of time. In other words, it is an “organized set of preferred norms that are used in the selection of objects and actions, in the resolution of conflicts, in the invocation of social sanctions and in the response to needs or claims of social and psychological defenses of choices made” (ROKEACH, 1979, p. 20).

These value systems are divided into terminal and instrumental values. Terminal values refer to desirable final states of existence, that is, the goals that a subject would like to achieve during his life. The instrumental ones are attributed to the subjects’ or groups’ preferred modes of behavior, with the aim of reaching terminal values (ROKEACH, 1979). In this system, the hierarchy of values allows the comparison between subjects and groups (social and cultural), “not only in terms of each of the values, but, particularly, in terms of axiological priorities” (TAMAYO, 1994, p. 7).

In the United States, several studies were carried out, by sampling, at different historical moments, aiming to compare the hierarchy of values in American society. According to Tamayo (1994), one of the comparative studies was carried out by the Institute for Social Research, at the University of Michigan. When analyzing the results achieved in 1968 with those of 1981, it was observed that the values most classified in 1981 were the same as those classified in 1968, including freedom, self-respect, happiness, and wisdom.

In the 1990s, researchers from around the world studied the motivational structure of values, especially Schwartz (1992), who identified 10 core human values. These are organized in a circular model, with “motivational objectives”, as guiding principles in the life of a human being, or of a group. In this model, “the values are represented as points in the multidimensional space, in such a way that the distances between them express the empirical relationships between the values” (translated from TAMAYO, 1994, p. 8).

In Brazil, Tamayo and Schwartz (1993) identified four characteristic values of Brazilian culture that interact in the axiological hierarchy, that is, the values peculiar to Brazilians, as

important and superior to traditional values. Among the postulated values are cleverness, as a way of overcoming difficulties to get where you want; the dream, as a positive vision of the future; vanity, as a concern with appearance; and work as a dignified form of survival. The latter, indicated as one of the supreme values of Brazilians, is justified by the high unemployment rates and precarious working conditions in the country. Finally, the authors also identified that the Brazilian axiological structure is influenced by the gender and occupation of the subjects (TAMAYO, 1994). In this context, it can be assured that human values vary in time and space, in cultures, genders, and social classes, and normally serve as a criterion for orientation, preference, and evaluation of life in society, that is, the direction and interaction with the social world.

In this context, values imply a dialectical relationship with norms, which are always a reflection of society's values. In other words, norms and values always act inseparably to shape subjects in specific societies. In this sense, values, norms, and social structures have a direct relationship with social reality, which is understood by Berger and Luckmann (1985) as objective and subjective reality, in a dialectical movement, combined in three simultaneous moments, the externalization, interiorization and objectification. Reality is constructed by a combination of social factors, resulting from human relationships and actions.

The objective reality is shown in the basic structures of institutionalization and legitimation, that is, institutions presuppose reciprocity, shared actions, built in the historical process, and that imply a system of control of human conduct. The subjective reality deals with the symbolic universe, with the process of socialization, primary or secondary. It is the first socialization that the subject experiences and only later does he become a member of society. The starting point of this process is the interiorization that is the basis for the apprehension of the similar, the creation of identity, emotions, and "the world as a social reality endowed with meaning". Secondary socialization "is the internalization of institutional 'underworlds'" (BERGER; LUCKMANN, 1985, p. 74).

Once the ontological, epistemological, and theoretical elements have been established, the constituent elements of this third component of the social dimension are now presented, that is, three variables that are essential to analyze the social dimension, in relation to the Values, Norms, and Social Structures component: (i) Values; (ii) Rules and morals and; (iii) Institutional density. It is also opportune to consider that these variables are fundamental in any and all social analysis, not just within the scope of this study.

In the first variable, Values, it is understood that they are linked to beliefs and emotions that, when activated, generate positive and negative feelings. It is a motivational construction that leads people to act appropriately in different social contexts, in such a way that they transcend specific situations and actions, as well as something that guides the "selection and evaluation of actions, policies, people and events and composes criteria for judgments [...]" (translated from TORRES; SCHWARTZ; NASCIMENTO, 2016, p. 342).

Schwartz et al. (2012) presented a refined set of 19 basic values, identified as (i) Self-orientation of Thought and (ii) Action; (iii) Hedonism; (iv) Stimulation; (v) Achievement; (vi) Power of Domination and (vii) Power over Resources; (viii) Personal and (ix) Social Safety; (x) Tradition; (xi) Conformity with Rules and (xii) Interpersonal Conformity; (xiii) Benevolence; (xiv) Dependence and (xv) Care; Commitment; (xvi) Nature Universalism and (xvii) Tolerance Universalism; (xviii)

Face; and (xix) Humility. They recently carried out a research, in cooperation with Brazilian researchers, whose objective was to examine whether these proposed values are discriminated by Brazilian samples and whether they are located in the motivational order according to the refined theory.

Torres, Schwartz, and Nascimento (2016, p. 353) state that the research carried out in Brazil increases the credibility “of the refined theory of values, demonstrating its resistance to changes in the measurement instrument”, as well as recommending that “the instrument is suitable for use with Brazilian samples”.

For this research, it is proposed to work with the ten values focused on the social, identified in the research by Schwartz et al. (2012) and recommended for use in Brazil by Torres, Schwartz, and Nascimento (2016): (i) Universalism; (ii) Dependency; (iii) Benevolence; (iv) Care; (v) Humility; (vi) Interpersonal; (vii) Conformity; (viii) Rules; (ix) Tradition; (x) Social Safety. The choice of focus on the social is due to the fact that they point to collective aspects.

In this sense, as the analysis of the activation of territorial heritage in the face of human values, as instruments for data collection may be through the application of a structured questionnaire, based on the Portrait Values Questionnaire – Refined (PVQ-R) of the Scale of Values by Schwartz et al. (2012) focusing on the social.

This variable proposes a scale organized into five levels, considering the set of values from the refined theory of Schwartz et al. (2012). In this way, it is considered at an optimal level (5), when of the 19 values (social and personal) 9 to 10 social values are identified in the set of questions in the Questionnaire of Basic Values applied in the territory; good level (4), when 7 to 8 social values are identified; regular level (3) when 5 to 6 social values are identified; bad level (2) when only 3 to 4 social values were identified; and very bad (1) when it is from 1 to 2 social values.

The second variable, *Norms and morals*, refers to principles that govern behavior and the perception of social and normative structures, such as the perception of social rights. It is recommended to analyze: (i) the sets of norms that control social behavior, what is permissible and what cannot be practiced; (ii) the imposition of duties; and (iii) action limits to the subject's conduct, in short, the established sanctions. However, in each normative degree, there are norms of conduct and norms of structure, that is, norms aimed at regulating the production of other norms (BOBBIO, 1997).

Habermas (1989, p. 143) launches the Discourse Ethics theory in which the norms and rules of moral conduct must proceed through discourse ethics. Its foundation consists of two essential paths. The principle of universalization as a rule of argument for practical discourses can be understood as “a reconstruction of intuitions in everyday life, which are at the impartial basis of conflicts of moral actions”. The second path seeks to demonstrate the validity of universalization, which “goes beyond the perspective of a given culture, is based on pragmatic-transcendental verification of universal and necessary assumptions of argumentation”.

Habermas, in his arguments, seeks an approximation in Kohlberg's ideas of the “theory of the development of moral conscience”. In theory, the individual's capacity for moral judgment is affected from childhood, through adolescence to adulthood, that is, it cannot be dissociated from his intellectual and psychomotor development. In this sense, it can be considered an evolution of awareness of the existence of normative principles and morality. In this theory,

moral development is divided into six stages, each in an “active process” grouped into three levels: pre-conventional, conventional, and post-conventional. The first brings (i) the stage of punishment, and obedience and (ii) the stage of individual instrumental goal and exchange. The second, conventional level, includes stages (iii) of mutual interpersonal expectations, relationships, and conformity and (iv) the stage of preservation of the social system and conscience. The third, post-conventional level, considers the stages (v) of original rights and the social contract or utility and (vi) the stage of universal ethical principles. In this last stage, “it is assumed orientation by universal ethical principles, which all humanity must follow” (translated from HABERMAS, 1989, p. 154).

For the analysis of this second variable, a structured questionnaire should be applied, based on the idea of the level of adherence to universal principles established in international treaties and agreements, such as the thirty articles/principles contained in the Universal Declaration of Human Rights, the four principles of the Declaration of the International Labor Organization (Fundamental Principles and Rights at Work), the twenty-seven principles of the Rio Declaration on Environment and Development and the three principles for preventing corruption enacted in the United Nations Convention against Corruption.

From these reference documents, 10 universal principles of interest to the community were selected, especially related to human dignity, access to decent work, and a healthy environment, which is a quality common to all and must be a normative statement with conditions to be developed and exercised in the territories: (i) Universality and Inalienability; (ii) Equality and non-discrimination; (iii) Participation and Inclusion; (iv) Elimination of all forms of forced or compulsory labor; (v) Effective abolition of child labor; (vi) Ecologically balanced environment; (vii) Sustainable development; (viii) Social function of property; (ix) Popular participation and; (x) Transparency.

This variable is also organized on a five-level scale to analyze the territory’s adherence to universal principles. In this way, it is considered at an optimal level (5) of territory activation, when 9 to 10 of the principles are identified in the set of questions in the Norms and Morals Questionnaire; good level (4), when 7 to 8 principles are identified; regular level (3) when 5 to 6 principles are identified; bad level (2) when 3 to 4 principles are identified; and very bad (1) when they are not identified or are between 1 and 2 universal principles.

As for Institutional Density, the third and last variable that was schematically selected as fundamental to social analysis, the organizational structure of the territory is considered to overcome dilemmas or changes in the behavior of actors in social and productive relations. In other words, Dallabrida and Fernández (2006) refer to the organizational-functional structure of a territory, produced based on the presence of a significant number of institutions directly or indirectly linked to the productive process and the level of interaction between the institutional actors and the set of territorial actors. The authors show that it is common to analyze the quality of this “institutional density, as the pattern of relationships used by local collective action networks, based on the cooperative interactions generated between public and private actors”. However, two fundamental issues are considered: the number of institutional actors linked to the activities of the value chain, the development “of cooperation actions, differentiating them according to their modality, their morphology and the destination of the cooperation action” (DALLABRIDA; FERNÁNDEZ, 2006, p. 18), as well as the relationship of trust, reciprocity, and collective well-being.

In this sense, the territorial institutional density can be understood based on the grouping of public and private actors/agents, in the combination of several factors including their inter-institutional interaction, in the cooperative work relationship, in the collective representation, with a common purpose in institutional or business and cultural terms, notably in shared norms and values (KIRAT; LUNG, 1999), forming a territorial, dynamic system of reproduction, founded according to Fernández (2004) on innovations, of a certain territory.

For the third variable, studies by Fernández (2004) and Dallabrida and Fernández (2006) were used as a basis, especially to identify the forms of organization, the quality of social relations, the technological and social innovation of the territory and the shared values, which are essential for territorial development, since they cause positive changes in social behavior, such as in productive relationships.

In the institutional density analysis, 10 criteria were selected that are capable of producing a profile of the institutions, of the relations between these institutions and of these with the individuals that integrate them in the territory: (i) Interaction between the institutions; (ii) Participation of individuals; (iii) Respect to individual freedom; (iv) Spaces for democratic deliberation (councils, among others); (v) Participation of institutions in the construction of public opinion; (vi) Institutions' respect for the environment; (vii) Freedom of association; (viii) Freedom of religious and political manifestation, among others; (ix) corruption; (x) and Innovation and social technology.

For this Institutional Density analysis, the semi-structured questionnaire is indicated, based on the 10 criteria selected for activating the Territorial Heritage, mentioned above. This technique is considered fundamental to collecting the necessary information on territorial reality since it provides the opportunity to survey the perceptions, opinions, beliefs, and interests of individual and collective actors. In the analysis, it is suggested visits "in loco", data collection through surveys and analysis of the Registers of the institutions,

In this variable, Institutional Density proposes, in the same way, the organization in a classification scale of five levels. In this sense, it is considered at an optimal level (5), when 9 to 10 of the selected criteria are identified in the territory; good level (4), when 7 to 8 of the criteria are identified; regular level (3) when 5 to 6 criteria are identified; bad level (2) when 3 to 4 criteria are identified; and very bad (1) when it is only 1 to 2 of the 10 criteria selected for analysis of territory activation.

In order to understand social behavior, in particular perception, it is necessary to analyze the social structure, especially to ascertain the imperative functions, the social positions, the privileges, and the roles or status they play, such as the prohibitive, imperative, and permissive orders in the territory.

Table 3 presents a summary of this third component of the social dimension, with its variables, collection instruments, and proposed indicators.

Table 3 – Values, Norms and Morals, and Institutional Density

Social Dimension			
Component	Variables	Tools for data collection	SCALE - (1 to 5)
Values, norms and social structures	Values	- Structured Questionnaire	5: 9 - 10 (optimal) 4: 7 - 8 (good) 3: 5 - 6 (regular) 2: 3 - 4 (bad) 1: 1 - 2 (very bad)
	Norms and Morals	- Structured Questionnaire	5: 9 - 10 (optimal) 4: 8 - 7 (good) 3: 5 - 6 (regular) 2: 3 - 4 (bad) 1: 1 - 2 (very bad)
	Institutional Density	- Semi-structured questionnaire based on the 10 criteria selected for the Territorial Heritage Activation. - "In loco" visit - Institutions Registry	5: 9 - 10 (optimal) 4: 7 - 8 (good) 3: 5 - 6 (regular) 2: 3 - 4 (bad) 1: 1 - 2 (very bad)

Source: Organized by the authors.

SOCIAL DIMENSION: AN AGGLUTINATION PROPOSAL

Having delimited the essential elements of each of the components of the social dimension, as well as presenting the constitutive variables, the possible collection tools, and the measurement proposal, it is now a matter of visualizing a synthesis of how the social dimension of territorial heritage could be investigated. Table 4, in a way, summarizes the methodological proposal presented for the study of the social dimension of the territory in research on Territorial Heritage.

Table 4 – Methodological proposal for the study of the social dimension of the territory in research on Territorial Heritage

Social Dimension			
Components	Variables	Tools for data collection	SCALE - (1 to 5)
Labor relations and access to goods and services	Formal and informal labor	- General Registry of Employed and Unemployed People (CAGED)	5: 80 to 100% of EAP (optimal) 4: 60 to 79% of EAP (good) 3: 50 to 59% of EAP (regular) 2: 40 to 49% of EAP (bad) 1: 1 to 39% of EAP (very bad)
	Income distribution between classes or class strata	- Gini Index	5: 0 to 0,30 (optimal) 4: 0,31 to 0,40 (good) 3: 0,41 to 0,50 (regular) 2: 0,51 to 0,60 (bad) 1: 0,61 to 0,80 (very bad)
	Social Vulnerability Indicators	- Social Vulnerability Indicators (IVS)	5: 0 to 0,200 – very low (optimal) 4: 0,201 to 0,300 – low (good) 3: 0,301 to 0,400 – average (regular) 4: 0,401 to 0,500 – high (bad) 1: 0,501 to 1 – very high (very bad)

Forms of organization and interaction	Organized social groups and class strata	- Structured Questionnaire	5: 90 to 100% (optimal) 4: 70 to 89% (good) 3: 50 to 69% (regular) 2: 30 to 49% (bad) 1: Below to 30% (very bad)
	Relationship networks	- Structured Questionnaire - Semi-structured interview - "In loco" visits	5: 90 to 100% (optimal) 4: 70 to 89% (good) 3: 50 to 69% (regular) 2: 30 to 49% (bad) 1: Below to 30% (very bad)
	Forms of cooperation and association	- Structured Questionnaire	5: 80 to 100% (optimal) 4: 60 to 79% (good) 3: 50 to 59% (regular) 2: 40 to 49% (bad) 1: 1 to 39% (very bad)
Values, norms and social structures	Values	- Structured Questionnaire based on Refined Values (PVQ-R) from Schwartz et al (2012) Values Scale, focusing on social	5: 9 - 10 (optimal) 4: 7 - 8 (good) 3: 5 - 6 (regular) 2: 3 - 4 (bad) 1: 1 - 2 (very bad)
	Norms and Morals	- Structured Questionnaire, based on the idea of the level of adherence to the 64 universal principles established in international treaties and agreements on Human Rights, ILO, Rio-92, CNCC	5: 9 - 10 (optimal) 4: 7 - 8 (good) 3: 5 - 6 (regular) 2: 3 - 4 (bad) 1: 1 - 2 (very bad)
	Institutional Density	- Semi-structured questionnaire based on the 10 criteria selected for the Territorial Heritage Activation. - "In loco" visits - Institutions Registry	5: 9 - 10 (optimal) 4: 7 - 8 (good) 3: 5 - 6 (regular) 2: 3 - 4 (bad) 1: 1 - 2 (very bad)

Source: Organized by the authors.

The table shows that the study of the social dimension requires the inter-complementarity of areas of knowledge, methodological approach, and tools for data collection. It requires interdisciplinarity and dialogue between the different sciences and scientists, in the direction proposed by Minayo (2014), when referring to the "triangulation of methods", bearing in mind "a shared frame of reference", which guides the search for data essential to capture the manifestations of the object. The triangulation of methods means adopting a posture of dialogue and working with different instruments, without a priori, discarding any possibility in the name of excluding options. The table indicates a possible way forward. A kind of script that, of course, can be improved, complemented, or modified by investigators or research groups based on their ontological, epistemological, theoretical, and methodological references. The intention here is to present a proposal to be matured in discussion and practice and not to propose a manual to be followed categorically.

In the social sciences there is a consolidated tradition in the sense that the scientist, when proposing research, is aware that their object is historical and, for being historical, they are in

the condition of “being” and not of “be”. With this, the scientist’s work moves in the direction of proposing a set of procedures capable of enabling the approximation of the object and the understanding of its manifestations, even knowing the impossibility of apprehending it in its entirety.

Translating Table 4 into a logical-mathematical representation in order to generate an Index of the Social Dimension in studies of territorial heritage and contribute to the construction of a General Index of Territorial Heritage, at different scales of territories or specific social formations, it is proposed Table 5.

Quadro 5 – Representation and equation for the study of the social dimension of the territory in research on Territorial Heritage

Components	Variables	Scale					Average	
		1	2	3	4	5	Equation	Valor
Labor relations and access to goods and services	T1						$\frac{T1 + T2 + T3}{3}$	T
	T2							
	T3							
Forms of organization and interaction	O1						$\frac{O1 + O2 + O3}{3}$	O
	O2							
	O3							
Values, norms and social structures	V1						$\frac{V1 + V2 + V3}{3}$	V
	V2							
	V3							
Index that represents the Social Dimension (IDS)						$\frac{T + O + V}{3}$	IDS	

Source: Organized by the authors.

In this composition of the Social Dimension Index (Índice de Dimensão Social - IDS), each of the three components had the same weight (33.33%), as well as each of the three variables and each of the three components. This indication points out that the nine variables and the three components do not establish, among themselves, a differentiated valuation scale because they represent structural or cyclical aspects of reality. It is clear that what is presented here is a kind of “ideal type”, in the direction of the Weberian tradition (WEBER, 1999), widely present in the social and applied social sciences, but which can be reconfigured in specific contexts and different theoretical traditions.

FINAL CONSIDERATIONS

This article sought to establish a reflection on the social dimension of the territory, delimiting a possible understanding of it, pointing out its components and variables, as well as proposing data collection and analysis procedures capable of guiding research about it. It is clear that reflection on the social dimension of the territory does not mean that it can be isolated from the totality, but rather that it must be scrutinized, with due scientific rigor, in order to better understand it. Understanding the totality is what gives meaning to its multiple dimensions and scales. However, the totality cannot be understood without an analytical look, through the instruments of science, in the sense of explaining its constitutive characteristics.

It is understood that the social dimension of a given territory can be understood from three major analytical components, articulated among themselves: (i) labor relations and access to goods and services produced; (ii) forms of organization and interaction; and (iii) the values, norms, and social structures that constitute it and give it consistency. The capitalist mode of production is based on private ownership of the means of production, on work as the main source of wealth production, and the market as the essential locus of circulation, access, and consumption of the goods and services produced. It is through work that human beings modify raw materials extracted from nature to transform them into products that are placed on the market.

In this context, work relationships and access to goods and services (or consumption) have an intrinsic connection and proximity, are marked by intense contradictions, and present themselves in different ways, in different territories. To study them, the proposal presented points to three variables: (i) formal and informal work; (ii) income distribution among classes or class strata; and (iii) social vulnerability indicators.

In a scenario of globalization, major transitions, enormous inequalities, and accentuated social polarization, understanding the forms of organization and interaction present in a given territory requires a new sociology of knowledge and an interdisciplinary approach that is attentive to three essential variables: (i) organized social groups and class strata; (ii) relationship networks; and (iii) forms of cooperation and association.

When it comes to looking at values, norms, and social structures, there is a need to identify actors, class interests, contradictions, and historical processes, especially to understand how society is organized in the territory. In capitalist societies, values play a decisive role in social praxis; the hegemony of dominant values (of classes or groups) influences the population to act in territories according to beliefs and interests, especially economic and political ones; and, in a certain way, an abstract perception of supposedly universal values is created. To understand this scenario, the proposal presented points to the need to work with three essential variables: (i) values; (ii) norms and morals; and (iii) institutional density.

The reflection on the social dimension of territories, in studies focused on territorial heritage, established in this text, highlighted the need to work with three major components and eighteen variables, based on an interdisciplinary, multidimensional, and multi-scale approach, which is attentive to the major ongoing transformations in world societies, but, at the same time, maintain sensitivity to perceive the manifestations of the different actors and the design of the different scenarios. For this to be possible, the epistemological, theoretical, and methodological posture requires special attention from researchers who need to “go into the field” armed with adequate tools, capable of being constantly reconstructed in the interaction with reality. There is the great challenge.

ACKNOWLEDGMENTS

The authors would like to express their gratitude to CNPq and FAPERGS for their support.

REFERENCES

- ANÉSE, R. L. R. *Arranjos produtivos locais e capital social no Vale do Jaguari/RS*. 2009. Tese (Doutorado em Economia) – Universidade Federal do Rio Grande do Sul, Faculdade de Ciências Econômicas, Porto Alegre, 2009.
- BAGLIONI, E. Labour control and the labour question in global production networks: Exploitation and disciplining in Senegalese export horticulture. *Journal of Economic Geography*, Oxford, v. 18, n. 1, p. 111-137, 2018.
- BERGER, P.; LUCKMANN, T. *A construção social da realidade: tratado de sociologia do conhecimento*. 24. ed. Petrópolis: Vozes, 1985.
- BERGER, P.; LUCKMANN, T. *A construção social da realidade: um livro sobre a sociologia do conhecimento*. Lisboa: Dinalivro, 2010.
- BOBBIO, N. *Teoria do ordenamento jurídico*. 9. ed. Brasília: Universidade de Brasília, 1997.
- BOISIER, S. E. *Sociedad civil, participación, conocimiento y gestión territorial*. Santiago de Chile: Ilpes, 1997.
- BOURDIEU, P. E. *Razões práticas: sobre a teoria da ação*. 8. ed. Campinas: Papirus, 2007.
- BRASIL. Secretaria de Educação Fundamental. *Parâmetros curriculares nacionais: terceiro e quarto ciclos: apresentação dos temas transversais*. Brasília: MEC; SEF, 1998.
- CAZELLA, A. A.; CARRIÈRE, J. Abordagem introdutória ao conceito de desenvolvimento territorial. *Eisforia*, Florianópolis, v. 4, p. 23-47, 2006.
- CHEN, M. The Informal Economy: Definitions, Theories and Policies. *WIEGO working Paper*, Manchester, v. 1, n. 26, p. 90.141-90.144, 2012.
- COLEMAN, J. S. *Foundations of social theory*. Harvard: Harvard University Press, 1990.
- CORIAT, B. (dir.) *Le Retour des Communs: la crise de l'idéologie propriétaire*. Paris: LLL (Les Liens que Libères), 2015.
- COSTA, M. A.; SANTOS, M. P. G. dos; MARGUTI, B. O.; PIRANI, N. C.; PINTO, C. V. da S.; CURTI, R. L. C.; RIBEIRO, C. C.; ALBUQUERQUE, C. G. de. *Vulnerabilidade social no Brasil: conceitos, métodos e primeiros resultados para municípios e regiões metropolitanas brasileiras*. Rio de Janeiro: Ipea, 2018. Disponível em: <https://www.econstor.eu/handle/10419/177580>. Acesso em: 10 fev. 2023.
- COSTA PINTO, L. A. *Sociologia e desenvolvimento: temas e problemas de nosso tempo*. 9. ed. Rio de Janeiro: Civilização Brasileira, 1986.
- COVAS, A. *Transição digital e inteligência coletiva territorial*. Lisboa: Editora Sílabo, 2021.
- COVAS, A.; COVAS, M. M. *A construção social dos territórios-rede: a inteligência territorial da 2ª ruralidade*. São Paulo: Editora LiberArs, 2014.
- DALLABRIDA, V. R. Patrimônio territorial: abordagens teóricas e indicativos metodológicos para estudos territoriais. *Desenvolvimento em Questão*, Ijuí: Editora Unijuí, v. 18, n. 52, p. 12-32, jul. 2020.
- DALLABRIDA, V. R.; FERNÁNDEZ, V. R. densidade Institucional. In: SIEDENBERG, D. R. (org.). *Dicionário do desenvolvimento regional*. Santa Cruz do Sul: Edunisc, 2006. p. 67-69.
- DALLABRIDA, V. R.; COVAS, M. M.; COVAS, A. Inovação, desenvolvimento e espaço urbano: uma relação necessária, mas não suficiente. *Revista Brasileira de Estudos Urbanos e Regionais*, Belo Horizonte, v. 19, n. 2, p. 360-378, maio/ago. 2017.
- DALLABRIDA, V. R.; ROTTA, E.; BÜTTENBENDER, P.; DENARDIN, V. F.; ARENHART, L. O. Abordagem territorial do desenvolvimento: categorias conceituais e pressupostos metodológicos. *Guaju – Revista Brasileira de Desenvolvimento Territorial Sustentável*, Matinhos, v. 7, n. 1, p. 43-80, jan./jun. 2021.
- DALLABRIDA, V. R.; ROTTA, E.; BÜTTENBENDER, P. L. Pressupostos epistêmico-teóricos convergentes com a abordagem territorial. *G&DR – Revista Brasileira de Gestão e Desenvolvimento Regional*, Taubaté, v. 17, n. 2, p. 256-273, maio/ago. 2021.
- DENARDIN, V. F. Desenvolvimento territorial e estratégias de valorização da origem de bens alimentares. In: WILKINSON, J.; MASCARENHAS, G. C. C. (org.). *O sabor da origem*. Porto Alegre: Escritos do Brasil, 2016. p. 51-72.
- DIAS, L.; SILVEIRA, R. *Redes, sociedades e territórios*. Santa Cruz do Sul: Edunisc, 2007.
- FERNÁNDEZ, V. R. Densidad institucional, innovación colectiva y desarrollo de las cadenas de valor local: un triángulo estratégico en la evolución de los enfoques regionalistas durante los '90s. *Redes*, Santa Cruz do Sul, v. 9, n. 1, p. 7-35, jan./abr. 2004.

- GROOTAERT, C.; NARAYAN, D.; JONES, V. N.; WOOLCOCK, M. *Questionário integrado para medir capital social (QI-MCS)*. 2003. Disponível em: https://edisciplinas.usp.br/pluginfile.php/4860551/mod_resource/content/1/Questionario%20Integrado%20para%20medir%20Capital%20Social%20Banco%20Mundial.pdf. Acesso em: 30 jun. 2022.
- GROOTAERT, C.; NARAYAN, D.; WOO, M. *Measuring social capital: an integrated questionnaire*. 2004. Disponível em: <http://documents.worldbank.org/curated/en/515261468740392133/Measuring-social-capital-an-integrated-questionnaire>. Acesso em: 30 jun. 2022.
- HABERMAS, J. *Consciência moral e agir comunicativo*. Rio de Janeiro: Tempo Brasileiro, 1989.
- HAESBAERT, R. *Território e descolonialidade: sobre o giro (multi)territorial/de(s)colonial na “América Latina”*. Ciudad Autónoma de Buenos Aires: Clacso, 2021.
- HARVEY, D. *A produção capitalista do espaço*. São Paulo: Annablume, 2005.
- INNERARITY, D. *A sociedade invisível: como observar e interpretar as transformações do mundo atual*. Lisboa: Teorema, 2009.
- INNERARITY, D. *O novo espaço público*. Lisboa: Teorema, 2010.
- IBGE. Instituto Brasileiro de Geografia e Estatística. *Cidades*. 2023. Disponível em: <https://cidades.ibge.gov.br/>. Acesso em: 6 fev. 2023.
- IPEA. Instituto de Pesquisa Econômica Aplicada. *Atlas da vulnerabilidade social nos municípios brasileiros*. Brasília: Ipea, 2015.
- JONAS, A. E. Local labour control regimes: uneven development and the social regulation of production. *Regional Studies*, Abingdon, v. 30, n. 4, p. 323-38, 1996.
- KIRAT, T.; LUNG, Y. Innovation and proximity territories as loci of collective learning processes. *European Urban and Regional Studies*, London, v. 6, n. 1, p. 27-38, jan. 1999.
- KUHN, T. *A estrutura das revoluções científicas*. Lisboa: Editora Guerra e Paz, 2021.
- MATTEI, L.; HEINEN, V. L. Análise da evolução do mercado formal de trabalho em Santa Catarina entre 2001 e 2016. *Revista Necat – Revista do Núcleo de Estudos de Economia Catarinense*, Florianópolis, v. 7, n. 13, p. 72-94, 2018.
- MILLAR, K. *The Informal Economy: Condition and Critique of Advanced Capitalism*. Durban: CCS, 2007.
- MINAYO, M. C. S. *O desafio do conhecimento – pesquisa qualitativa em saúde*. 14. ed. São Paulo: Hucitec, 2014.
- MORIN, E. *Introdução ao pensamento complexo*. Porto Alegre: Sulina, 2005.
- NEVES, C.; CAMARA, M. R. G. Da; SESSO FILHO, U. A.; ESTEVES, E. G. Z.; MARCONATO, M. Análise do Índice de Gini nos municípios de Santa Catarina em 2000 e 2010: uma abordagem exploratória de dados espaciais. *Revista Brasileira de Estudos Regionais e Urbanos*, São Paulo, v. 9, n. 2, p. 209-227, jun. 2016.
- PATTENDEN, J. Working at the margins of global production networks: local labour control regimes and rural-based labourers in South India. *Third World Quarterly*, Abingdon, v. 37, n. 10, p. 1.809-1.833, 2016.
- PRONI, M. W. Trabalho decente e vulnerabilidade ocupacional no Brasil. *Economia e Sociedade*, Campinas, n. 22, p. 825-854, 2013.
- PUTNAM, R. D. *Comunidade e democracia: a experiência da Itália moderna*. Tradução Luiz Alberto Monjardim. 3. ed. Rio de Janeiro: FGV, 2002.
- RAMOS, J. P. S.; COSTA, F. M. Análise comparativa sobre o Índice de Vulnerabilidade Social (IVS) entre o município de Santa Inês (BA), a Bahia e o Brasil no Ano de 2010. In: SEMANA DE ECONOMIA: POLÍTICAS PÚBLICAS PARA O DESENVOLVIMENTO, 8., 2018, Ilhéus. *Anais [...]*. Ilhéus: Uesc, 2018.
- RIFKIN, J. *A era do acesso: a revolução da nova economia*. Lisboa: Editorial Presença, 2001.
- ROKEACH, M. *Understanding Human Values: Individual and Societal*. New York: Free Press, 1979.
- ROTTA, E.; TEIXEIRA, T.; COVAS, M.; ANDRADE, A.; QUADROS, D. A. Abordagem territorial do desenvolvimento: um olhar a partir da Dimensão Social. *G&DR – Revista Brasileira de Gestão e Desenvolvimento Regional*, v. 18, n. 1, p. 100-116, jan./abr. 2022.
- SCHWARTZ, S. H. Universals in the content and structure of values: theoretical advances and empirical tests in 20 countries. *Advances in Experimental Social Psychology*, Waterloo v. 25, p.1-65, 1992.
- SCHWARTZ, S. H.; CIECIUCH, J.; VECCHIONE, M.; DAVIDOV, E.; FISCHER, R.; BEIERLEIN, C.; KONTY, M. Refining the theory of basic individual values. *Journal of Personality and Social Psychology*, Washington, v. 103, n. 4, p. 663-688, 2012.
- SEN, A. *Desenvolvimento como liberdade*. São Paulo: Editora Companhia das Letras, 2000.
-

SMITH, A.; BARBU, M.; CAMPLING, L.; HARRISON, J.; RICHARDSON, B. Labor regimes, global production networks, and European union trade policy: labor standards and export production in the Moldovan clothing industry. *Economic Geography*, London, v. 94, n. 5, p. 550-574, 2018.

TAMAYO, A. Hierarquia de valores transculturais e brasileiros. *Psicologia: Teoria e Pesquisa*, Brasília, v. 10, n. 2, p. 269-286, 1994.

TAMAYO, A; SCHWARTZ, S. H. Estrutura motivacional dos valores. *Psicologia: Teoria e Pesquisa*, Brasília v. 9, p. 329-348, 1993.

TORRES, C; SCHWARTZ, S. H.; NASCIMENTO, T. A Teoria de Valores Refinada: associações com comportamento e evidências de validade discriminante e preditiva. *Psicologia USP*, São Paulo, v. 27, n. 2, p. 341-356, 2016.

WEBER, M. *Economia e sociedade: fundamentos da sociologia compreensiva*. Brasília: Editora UnB; São Paulo: Imprensa oficial do Estado de São Paulo, 1999.

This article is licensed under a Creative Commons Attribution
4.0 International License