

MULTIDIMENSIONAL INDEX OF TERRITORIAL HERITAGE ACTIVATION: A Proposed Methodological Framework for Territorial Studies

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ABSTRACT

Starting from the territorial perspective of development, a structured methodological framework is proposed that takes into account the integrated, multidimensional socio-economic, cultural, and environmental reality, recognizing the complexity of territorial dynamics. The overall objective is to propose a methodological tool suitable for territorial analysis perspective, in order to contribute to the elaboration of territorial diagnostics that favor the prospecting of innovative and sustainable alternatives for development, with territorial heritage as a reference. The approach is bibliographic and argumentative in nature, with emphasis on the studies carried out by a group of researchers from various national and international universities, motivated to develop the Multidimensional Index of Territorial Heritage Activation (IMAP). The proposed method is presented, highlighting the ontological, epistemological, theoretical, and methodological assumptions that support the construction of the partial indexes of the six dimensions of territorial heritage (social, productive, cultural, human-intellectual, institutional, and natural) and the overall aggregated index. It is understood that the construction of this methodological reference can be an important contribution to the advancement of development studies, considering the territorial perspective of analysis.

Keywords: territorial development; territorial heritage; research method; multidimensional index.

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**ÍNDICE MULTIDIMENSIONAL DA ATIVAÇÃO DO PATRIMÔNIO TERRITORIAL:
UMA PROPOSTA DE REFERENCIAL METODOLÓGICO PARA ESTUDOS TERRITORIAIS**

RESUMO

Parte-se da perspectiva territorial do desenvolvimento para a propositura de um referencial metodológico estruturado que assume a realidade socioeconômica, cultural e ambiental, de forma integrada, multidimensionalmente, reconhecendo a complexidade das dinâmicas territoriais. O objetivo geral consiste em propor um instrumental metodológico adequado à perspectiva territorial de análise, com o fim de contribuir na elaboração de diagnósticos territoriais que favoreçam a prospecção de alternativas inovadoras e sustentáveis de desenvolvimento, tendo o patrimônio territorial como referência. A abordagem é bibliográfica, de caráter argumentativo, com ênfase no percurso de estudos realizados por pesquisadores de diversas universidades nacionais e internacionais, motivados para a elaboração do Índice Multidimensional da Ativação do Patrimônio Territorial (IMAP). Apresenta-se o método proposto, evidenciando os pressupostos ontológicos, epistemológicos, teóricos e metodológicos que dão guarida à construção dos índices parciais das seis dimensões do patrimônio territorial (social, produtiva, cultural, humano-intelectual, institucional e natural) e do índice geral agregado. Entende-se que a construção deste referencial metodológico possa ser uma contribuição importante para o avanço dos estudos do desenvolvimento, considerando a perspectiva territorial de análise.

Palavras-chave: desenvolvimento territorial; patrimônio territorial; método de pesquisa; índice multidimensional.

INTRODUCTION

The present text deals with a complex theme that intends to fill a gap in relation to territorial studies: the lack of a structured methodological framework that meets the demands of the territorial analysis perspective. That is, it starts from the understanding that a methodological tool suitable for the multidimensional analysis of different territorial cutouts is a challenge not effectively faced. In addition, the hypothesis is supported that the territorial approach to development serves a central purpose, such as, to be an alternative for overcoming spatial analysis, whether rural or urban, centered on disciplinary and/or sectoral procedures, presenting itself as an indispensable condition for carrying out studies that assume the socioeconomic, cultural and environmental reality, in a multidimensionally integrated way, recognizing its complexity.

It is opportune to present the course of this methodological proposal, since from the finding to the initiative of taking on the challenge of engendering a proposal for a multidimensional methodological reference, there is a long journey, which the reader deserves to know, in order to understand that, what is proposed, does not result from an individual insight, a “sudden vision” of an “enlightened subject”. There is a starting point, the theoretical reflections of the collective, of those who study the territorial reality. Such reflections are interpreted by other scholars and, at some point, someone manages to structure a set of arguments that, finally, makes a certain problem more evident, which, again, instigates, and encourages other researchers to advance in the debate on the subject. This is the constant process of learning, of producing scientific knowledge.

To a greater or lesser extent, a large set of publications, most of which are listed in this article, initially inspired two publications carried out in 2020: (i) Dallabrida (2020a), which proposed to elucidate the territorial dynamics of development based on four theoretical categories (territory, governance, heritage, and territorial development); (ii) Dallabrida (2020b), which expands visibility and gives new meaning to the territorial heritage category¹⁰. These

¹⁰Two indicative publications of Italian authors on the theme: Dematteis and Magnaghi (2018); Tarsi (2019).

two publications, in continuity, inspired the structuring of a research project entitled Territorial Heritage as a Reference in the Process of Developing Territories or Regions (ProPAT), presented in 2020 to the National Council for Scientific and Technological Development (CNPq) in a public notice (Bolsa-PQ), which was approved and started to be implemented in February 2021. This project aimed to develop studies, propose and validate a methodological tool that is more adequate to the territorial analysis perspective, aiming to contribute to the elaboration of diagnoses that favor the exploration of innovative and sustainable development alternatives, having the territorial heritage as a reference.

In parallel, since April 2020, the time of the pandemic, extending to mid-2021, a series of thematic seminars have taken place. The initiative came from the Ibero-American Network of Studies on Territorial Development and Governance (REDETEG), which later integrated partners, such as graduation programs at universities and other networks of researchers, such as the Brazilian Network for Research and Management in Regional Development (RETE). In these seminars, themes convergent with territorial development and governance were addressed, with speakers from universities in Brazil, Latin American countries, Portugal and Spain. This profitable process of debates awoke, in several researchers, the interest in the study of themes related to territorial development and governance and/or territorial approach to development, and many of them joined the process of executing the ProPAT research project.

Thus, once the ProPAT project team was formed, as its first task, it proposed to outline some basic assumptions of an ontological, epistemological, and theoretical-methodological nature, which would converge with the territorial approach to development. These first studies resulted in two articles: (i) Dallabrida, Rotta, and Büttendbender (2021), in which the research's epistemic-theoretical assumptions are presented; (ii) Dallabrida et al. (2021), in which the conceptual categories and methodological assumptions convergent with the territorial approach to development are explained. Subsequently, in the first quarter of 2022, the research team for the aforementioned project published the Dossiê Temático Patrimônio Territorial, in the Revista Brasileira de Gestão e Desenvolvimento Regional (v. 18, n. 1), comprising an introductory text and six articles which, as a whole, propose references for the structuring of a multidimensional methodological instrument that could be used in the analysis and territorial prospecting.

This team reflection work generated research projects and subprojects derived and articulated among themselves, with fundraising from FAPERGS/RS, UFPR, and UFFS. This movement has been contributing and reinforcing, in a virtuous and systemic way, the motivation for advances in the ProPAT project, adding new researchers to the group.

Then, from mid-2022 to May 2023, the research team of the ProPAT project, divided into six working groups, each of them studying one of the dimensions of territorial heritage (social, productive, cultural, human-intellectual, institutional, and natural), worked, through virtual meetings and thematic seminars, in identifying the basic components of each dimension. Variables and techniques and/or instruments for data collection were defined, with the aim of structuring a multidimensional methodological framework, to be used in prospecting and projecting alternatives for the development of different territorial cuts (municipalities, regions, territories). In this framework, in addition to pointing out the components to be considered in the study of the territorial reality, it was dared to parameterize the variables on scales ranging from an excellent situation to a very bad one, in terms of activation of the territorial heritage. This parameterization allows composing an index in each dimension that, in the aggregation by

simple average, makes it possible to compose a multidimensional index that expresses the social, productive, cultural, human-intellectual, institutional, and natural reality of the territorial area to be studied. This index is now called the “Multidimensional Index of Territorial Heritage Activation” (Índice Multidimensional da Ativação do Patrimônio Territorial - IMAP), as explained below.

This is the challenge that a group of more than thirty researchers from Brazil, Argentina, Portugal, Spain, and England set themselves, in the period from 2021 to 2023.

From this contextualization, through these introductory considerations, the present study aims to explain the support assumptions of the aforementioned “multidimensional methodological framework”. The first section presents the theoretical basis of reference for the territorial approach to development. The second seeks to clarify the theoretical categories used in the design of the multidimensional methodological framework. In the third, the central aspects of the multidimensional methodological framework are presented. The final considerations seek to indicate the next steps in this daring undertaking, in addition to pointing out possible limitations of the proposal presented here.

1. A THEORETICAL BASIS OF INSPIRATION FOR THE TERRITORIAL APPROACH TO DEVELOPMENT

The territorial perspective of analysis has as its starting point reflections of different theoretical currents, starting with publications that, since the last decades of the 20th century and, especially at the beginning of the 21st century, advocated the “return to the territory” (BAGNASCO, 1988; 1977; BECATTINI, 1987; SANTOS, 2005; PECQUEUR, 2009).

There are several authors from the field of Geography who served as inspiration. Starting with two works that question the traditional debate in Geography on socioeconomic and geopolitical issues and their relation with the development process: CASTRO (1957, 2000) and Lacoste (1985). At the same time, other geographers, both international (MÉNDEZ, 2023, 2002; HARVEY, 2006; DEMATTEIS; GOVERNA, 2005; MASSEY, 2008, 2004; BENKO, 1996; RAFFESTIN, 1993), and Brazilians, have stood out in the discussion of territorial issues. Among Brazilian geographers, there are authors such as Saquet (2022, 2020, 2019, 2018, 2015, 2013), Silveira (2022, 2003), Haesbaert (2021a, 2021b, 2019, 2013, 2011, 2007), Souza (2009) and Etges (2005), who had publications focused on the territory, when analyzing the socioeconomic-cultural reality, with geographic and/or interdisciplinary approaches.

There are reference authors of Economics, who establish a relationship between territory and economy, such as Ferrera de Lima (2022, 2012), Theis (2022, 2019), Theis et al. (2022), Brandão (2007), Campolina Diniz and Lemos (2005) and Boisier (2000; 1998), to name a few in the Latin American scenario, with a more directed focus on development studies. In the areas of Economics, Geography and Social Sciences and Humanities in general, including multidisciplinary approaches, the list is extensive, which requires prioritizing some: Perafán et al. (2022, 2018); Favareto (2022, 2020, 2010)¹¹; Denardin (2016); Buno Favarão and Favareto (2021); Galvanese (2021); Favareto et al. (2015); Lemonade (2013); Schneider (2010); Vieira and Cazella (2009); Rambo and Filippi (2009); Ribeiro and Milani (2009); Amin (2008); Pecqueur (2006);

¹¹Favareto (2023) deepens the approach on “triad coalitions of social actors, assets and institutions”.

Schneider and Turtle (2004); Veiga (2002); Sabourin (2002); Courlet (2001); Lopes (2001); Veltz (1995); Scott and Storper (1986).

Other publications contributed directly or indirectly to the debate on the territorial perspective of development, some of them highlighting issues related to the socioeconom-ic-institutional environment (SEN, 2000; PUTNAM, 2000; GILLY; TORRE, 2000; AYDALOT, 1986; MORGAN, 1997), others highlighting the innovation factor (NELSON, 1993; LUNDVALL, 1992; MAILLAT, 1995, 2002) and, finally, others focused on the economic-business field, referring to the agglomeration factor (SANTOS; CROCCO; LEMOS, 2002; PORTER, 2000; CASSIOLATO; LASTRES, 1999). In Brazil, it is important to remember that the economist Celso Furtado, for his essential contributions to the debate on regional issues, is considered a special reference (FURTADO, 1970, 2000)¹². Another notable note can be given to an author from Rio Grande do Sul (DE SOUZA, 2009)¹³ for publications with a didactic character.

In the specific case of the ProPAT research project, many of the publications mentioned in this section of the text served as inspiration. Thus, four theoretical categories centrally discussed by the literature serve as inspiration for the territorial approach to development and deserve to be highlighted: territory, territorial governance, territorial heritage, and territorial development¹⁴, ordered as follows:

- i. A starting category, the territory, as a socio-territorial structure historically and territorially located, whose parts are interrelated;
- ii. A category of intermediation, territorial governance practices, as a process in which different interests/intentions are confronted, with the purpose of building convergences regarding the territorially desired future, starting from the understanding that the form historically assumed by a structure results from horizontal societal conversations;
- iii. A resulting category, the territorial heritage, as a form assumed by the socio-territorial structure, formatting the spatial arrangement with its different dimensions;
- iv. A category of functionality, territorial (or local/regional) development, as a function of the form, based on the understanding that from the confrontation between different projects for the future result spatial configurations demarcated administratively (municipalities, regions, countries) or by relations of identity, anchorage and belonging to a place (territories), being part of the territorially desired utopia and its momentary concreteness as a possible reality (translated from: DALLABRIDA, 2020a).

Therefore, Santos' (1997) geographic method analysis categories were taken as a guideline, and a relationship was established with the territorial dynamics of development.

¹²The author's work is extensive. These two are highlighted as an example.

¹³Considering the restricted space of this text and also because they are common knowledge of those who discuss the theme of the so-called theories of development, the theorists of "classical location theories" and "theories on regional dynamics" (Centres of Growth, Cumulative Circular Causation, Interregional Transmission of Growth, Export Base Theory), in addition to the contribution of Marxist theorists and Latin American Structuralism. Two works provide good syntheses on these approaches: Dallabrida (2017) and Lima and Simões (2010).

¹⁴The literature on territorial governance will not be mentioned in this text, for the same reasons used in the previous note. Three publications are suggested: Dallabrida and Becker (2011), Dallabrida (2015), and Pires (2022).

The meaning of territory is assumed as a social, historical, and relational construction (SAQUET, 2015). Territorial governance refers to the process of planning and managing territorial dynamics, through horizontal relationships between social, public, and corporate actors (DALLABRIDA, 2015; PIRES, 2022). The territorial heritage, as a set of assets and resources, material and immaterial of a given territory (DEMATTEIS; MAGNAGHI, 2018; DALLABRIDA, 2020b). “Development is the result of a historical and relational process, of multiple economic, political, cultural and natural determinations” (translated from: SAQUET, 2015, p. 25). Therefore, it does not result from processes induced from outside, from enterprises that are established in the territories to benefit from the abundant supply of natural resources existing there or cheap labor, nor from a chance event, or the opportunity to set up a new enterprise, or the economic growth it provides (DALLABRIDA, 2017). The discovery of the territory and the revaluation of the premises of territorial development converge in the construction of a conception of development that is dialogic, ecological, cultural, and participatory, seeking to value decision-making autonomy, anchorage, and territorial ties, in addition to the preservation of nature, identity, and popular knowledge (SAQUET, 2018).

Marino Del Rio (2022), when proposing a “landscape project based on territorial heritage”, reaffirms the importance of establishing parameters, based on a series of objectives and guidelines that allow the activation of territorial heritage, when defining a scenario future strategy for a given territory. Such parameters and guidelines, according to the aforementioned author, should be centered on valuing and putting their constituent elements to use, in all their dimensions, in order to overcome the historical constraints that hindered their evolution. Merino Del Río (2022) compares this activation, guided by objectives and guidelines, as being the “growth of the heritage mass”, as a contribution to local development with self-sustainability, which can also be called just a contribution to territorial development. The activation proposal, or growth of the heritage mass, according to the author, should have its origin in the agreement between the social actors, the economic-productive sectors, and the local public administration.

This orientation is most indicated in socio-institutional articulation processes whose purpose is to support the development of a territory, region, or municipality. In the studies in which a Multidimensional Index of Territorial Heritage Activation is proposed, the objective was to build a methodological instrument that could be used in different territorial cuts. Thus, it was decided to consider as a parameter a set of principles arising from an epistemic-theoretical basis convergent with the territorial approach to development¹⁵.

Therefore, from the epistemic-theoretical bases assumed in the investigation of the ProPAT project, one can deduce a series of principles considered fundamental in the orientation of the analytical perspective, also having methodological implications. Thus, in Table 1, the principles indicated by the assumed epistemic-theoretical basis are mentioned, with their implications. Such principles, with their analytical perspective and methodological implication,

¹⁵Even so, with the purpose of meeting what Merino Del Rio (2022) suggests – that propositions in terms of development perspectives should occur in agreement between social actors, economic-productive sectors, and local public administration -, two publications of members of the ProPAT project team, present indications in this sense: Dallabrida et al. (2022); Dallabrida, Menezes and Fuini (2023).

can thus be considered macro referents, or parameters, in the structuring of the intended “multidimensional methodological proposal”.

Table 1- Principles, analytical perspective and methodological implication in territorial analysis and prospecting

Principles	Analytical perspective	Methodological Implication
Interdependency	The different dimensions of reality, at the same time that they have their own form of organization, are interrelated, requiring their analysis from its various dimensions	Consider the interdependence of variables
Integration	It is necessary to recognize the articulations and connections between the different problems and potentialities	Consider the possible articulations and connections
Multidimensionality	Objects or phenomena have many facets and must be considered from different points of view	Variables need to be analyzed multidimensionally
Multidisciplinarity	Complex realities, such as the territorial context, do not allow for monodisciplinary interpretations, resulting in the effort to overcome disciplinary or sectoral approaches	Analyses require a look that goes beyond the disciplinary view
Anti-reductionism (holism)	Objects and phenomena need to be understood in an integral way, not being explainable by the properties of their parts separately	Prioritize the view of the whole over the parts
Plurality (pluralism)	Equally consider the subjects’ knowledge and worldviews and the different possible interpretations of reality	Consider views or interpretations, even if not dominant
Incompleteness	Reality has a dynamic character, and it is necessary to analyze the characteristics demonstrated and their possible evolutions	Analyze the possible future advances of the characteristics found at the moment
Uncertainty	The analysis of an object or phenomenon demands much more projection of scenarios than definitive answers or proposals.	
Contradiction	Different perceptions are not necessarily rejectable, they might only result from the disparity between the notions adopted in the description of the object or interpretation of the phenomenon	Evaluating options that contradict the momentary perception of reality can be an option
Totality	Despite its particularities, the analysis of a spatial area (territory, region or municipality) does not fully explain a reality, as this is part of a spatial totality, which is explained by the interrelation of the parts (“the part is in the whole and the whole is in the part”)	Evaluate reality in a contextualized way (regional, national, worldwide)
Historicity	A set of previous factors conditioned the current situation of an object or phenomenon, with future trends, however, new spatial and temporal conditions are capable of redirecting its future situation	Assess reality according to possible historical conditions (yesterday/tomorrow)
Autonomy	The analysis of a given reality must consider the deconstruction of essentialisms, in the form of dominant conceptions, allowing the option for alternatives that favor autonomy and territorial power	General indicatives serve as referents, not determinants, allowing the expression of specificity

Decentering	Analyses and prospected alternatives in a given spatial context need to consider the perspective of dynamic and peripheral sectors equally.	All dimensions of local reality need to be considered equally
Relationality	The territory is a field of relationships (society x nature, individuals x societies), therefore structured in the form of networks	Consider the variables in their relational dimension
Inclusion (social and spatial)	Solutions and alternatives must pay as much attention as possible to inclusivity, both social and spatial	When proposing alternatives, prioritize those that serve a greater number of beneficiaries, both personally and spatially
Equanimity	Resources, goods and territorial services require an equitable social redistribution, tending to build less unequal societies	
Innovation (smartification)	Solutions and alternatives need to consider the technological and socio-technical innovations allowed by the current stage of civilization and future perspectives, enjoyed equally	Alternative solutions to the challenges must meet the perspective of innovation and creativity
Sustainability (environmental)	All the enunciated principles, the guidelines, and alternatives suggested by them, must be directed to the preservation and enhancement of life in all its forms of expression.	Proposed alternatives must have uninterrupted replicability, with respect to life in all its forms of manifestation

Source: Dallabrida (2022, p. 10).

Based on the statement by Marino Del Rio (2022), that the process of activating territorial heritage must be centered on valuing and putting its constituent elements to use, in all their dimensions, thus allowing to overcome the historical constraints that hindered its evolution, from the enunciation of the principles indicated by the epistemic-theoretical base assumed in the ProPAT project, it is possible to prioritize some of them in each dimension of the territorial heritage, with the purpose of serving as macro referents, or parameters in the dimensioning of the degree of activation of the territorial heritage. Some principles may refer to all dimensions, others specifically to one or another dimension of territorial heritage.

As possible general references, it is suggested: (i) Environmental sustainability: prioritization of alternatives that may have uninterrupted replicability, with respect to life in all its manifestations; (ii) Inclusion and Equanimity: prioritizing alternatives that serve a greater number of beneficiaries, from the perspective of personal and spatial equanimity; (iii) Innovation: prioritizing alternatives for solving challenges that meet the perspective of innovation and creativity; (iv) Totality: prioritizing respect for territorial specificities, however, analyzing solutions and alternatives that consider reality in an integrated and contextualized way (regional, national, worldwide); (v) Multidimensionality and Integration: prioritize solutions and alternatives that meet the perspective of multidimensionality, considering their possible articulations and connections; (vi) Autonomy: prioritize solutions and alternatives that favor autonomy and territorial power, allowing the expression of its specificities.

The entire theoretical basis originates from an ontological-epistemic basis. Thus, in the studies of the ProPAT project, the starting point was the understanding that it is in the epistemological field that the guidelines that will guide the unveiling of the object of study in an investigation are evidenced, placing it in a given paradigmatic perspective. Therefore, the ProPAT

project sought support in four epistemic fields, having as a criterion its greater convergence with the territorial perspective of analysis, namely: (i) the new systems theory (CAPRA, 1996); (ii) complexity theory (MORIN, 1996); historical-dialectical materialism (PIRES, 1997); and the epistemological perspective based on decoloniality (MIGLIEVICH-RIBEIRO, 2014) and decentering (SANTOS, 2014). Such epistemic fields point to the equitable redistribution of social resources and the attribution of goods and services for collective use to all citizens¹⁶.

These brief reflections, in summary, suggest that thinking about development, while having the territorial heritage as a reference, implies that the surveys that are carried out, equitably contemplate the “barbarians” of contemporary times, that is, the segments still excluded from the benefits that may be made possible by current technological developments, in addition to future generations who are also excluded from decisions, but their lives will certainly be impacted by present choices. It implies rethinking planning, converging with what Milton Santos (2014) calls the “civic-territorial model”. This is supported by an epistemological framework of a decentralizing and decolonial character. It is, in theory, the attempt to prioritize epistemological conceptions that avoid the exclusion and silencing of subjects, with their knowledge and worldviews, often denied as explanatory and legitimate guidelines for conduct, whether of minorities or marginalized and/or dispossessed groups. Finally, the expression “barbarians”, which has a historical origin to refer to peoples or individuals who did not submit to Western civilization precepts, contemporaneously, can be referred to those who are excluded from modern society, for ethical-cultural reasons, socioeconomic, behavioral, or because they do not suit the requirements of technological modernity. This all implies that thinking about development from a territorial perspective represents an attempt to overcome the developmental fallacy, in terms of meeting the plural desires and interests that exist in the territories (DALLABRIDA; ROTTA; BÜTTENBENDER, 2021).

CLARIFYING TERMINOLOGIES

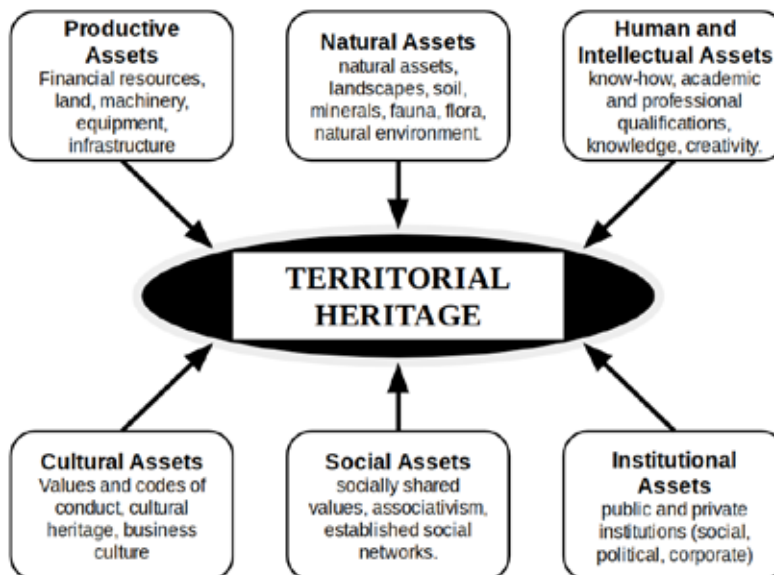
When mentioning a “multidimensional methodological framework”, for a better understanding, it is required to clarify the meaning of the terms used. The mention of the “methodological framework” term is to refer to a set of components, variables, and techniques and/or data collection and analysis instruments, which will serve as a reference in the composition of a scale, which will vary from a situation of insufficiency to an approximation to an “ideal standard”, which will represent the activation index of each of the dimensions of the territorial heritage. The use of the term “multidimensional” refers to the fact that, from the calculation of the index in each dimension, its weighted sum will compose an index that synthesizes all dimensions of the territorial heritage, of each spatial area under analysis.

To talk about “activation of territorial heritage” it is necessary, initially, to turn attention to some conceptual issues. First, a reference to the territorial heritage category, the central object of the process: “[...] set of assets and resources, material and immaterial, that have

¹⁶The explanation of the epistemic-theoretical base, the methodological references used in the ProPAT project, as well as, indicatives to guide processes of articulation or territorial governance, can be accessed in two publications: Dallabrida, Büttenbender and Rotta (2021) and Dallabrida et al. (2021).

accumulated throughout history in a given territory” (translated from DALLABRIDA, 2020b, p. 12), with its constituent elements, is shown in Figure 1.

Figure 1- Territorial Heritage and its components



Source: Dallabrida (2020b)

The outline of territorial heritage and its dimensions (Figure 1) is inspired by contributions by Albertos et al. (2004), with a later interpretation by Caravaca and González (2009), they refer to “territorial capital” as the set of territorially rooted “heritage assets”, subject to activation by the action of local actors. The option for the category “heritage” and not “capital” is based on contributions by Magnaghi (2003) and Poli (2015), who propose advances in their interpretation, as they consider the use of the category “territorial heritage” as a historic co-evolutionary construct, resulting from anthropic activities that transformed nature into territory, while “territorial capital”, is a concept initially introduced in documents of the Organization for Economic Cooperation and Development (OECD), to refer to the specificities of the territory, subject to use to achieve economic competitiveness. Therefore, according to this understanding of these two authors, the option for the notion of territorial heritage in the debate on territorial development and governance helps to distance us from a conception that is still too “economicist” of development.

In addition, it is necessary to understand the meaning attributed here to the expression “activate”. “Activation” refers to the act of activating, whose word has a significant number of synonyms, which, at the same time, explain and expand the meaning of the word. Thus, “activate” means to accelerate, sharpen, amplify, hasten, enliven, awaken, stimulate, foment, strengthen, boost, intensify, promote, and invigorate.

However, to understand the territorial heritage activation process, as a starting point, it is necessary to resort to the meaning of resources and assets proposed by Benko and Pecqueur (2001, p. 41). “Active factors are understood to be active, while resources are factors to be revealed, explored or even organized. Resources, unlike assets, thus constitute a reserve, a latent potential”. Therefore, territories, at each moment in history, are formatted in spatial arrangements that can be identified through a set of resources and territorial assets. Thus, in the spatial

arrangement of a given territory, with its different dimensions (social, cultural, productive, natural, institutional, and human-intellectual), there are factors that present themselves in the form of resources (the factors to be revealed, explored, or yet to be organized), others, which are presented in the form of assets (factors “in activity”, in use). Exploring, here has the meaning of arranging, preparing, cultivating, fortifying, and fertilizing.

Therefore, when the expression “activation” is used, reference is made to the need to transform territorial factors still in the situation of resources, undisclosed or not properly used, into territorial assets able to contribute to territorial development. By extension, carrying out, or achieving, the “activation of territorial heritage” means identifying and/or revaluing the potentialities, putting them into activity, in use, with the perspective of starting to contribute more significantly to territorial development, both in the socio-productive sense and in contributing to the improvement of the quality of life of people living in the territory. It can be both a tangible factor (e.g. arable land) and an intangible one (appreciation of a cultural expression, or local know-how, or the propensity for cooperation).

When mentioning an “index”, it is to refer to a quantitative or qualitative reference that serves to inform about the performance of something, or some phenomenon, oscillating between two extremes: from a stage of total precariousness to a stage of full efficiency. On the other hand, when referring to a “multidimensional index”, one is referring to an aggregation of indicators that contemplates multiple dimensions, or that concerns different levels or fields. In the case in question, it is an indicator that covers all dimensions of territorial heritage. According to Van Bellen (2005), an index is created by aggregating two or more simple indicators, referring to the same dimension, or different dimensions, of reality.

Therefore, the Multidimensional Index of Territorial Heritage Activation (IMAP) reveals the situation at the moment, regarding the way of using the potential of the territory for territorial development, through the activation of each of the dimensions of the territorial area under analysis. In an ideal extreme, all the factors would be activated, and the potential fully and efficiently utilized. On the other extreme, a situation of absolute lack and precariousness, therefore, of non-activation. Therefore, the fully activated territorial heritage would constitute an “ideal territory”, this being adopted as a parameter of analysis.

An important observation: when referring to the activation of territorial heritage, that is, the potential of territory for territorial development, it is implicit the understanding that all precautions are being considered so that the principles of sustainability are contemplated, in all of their forms of expression.

ASPECTS OF THE MULTIDIMENSIONAL METHODOLOGICAL FRAMEWORK

The method of approach adopted

The researchers involved in this research come from different disciplinary fields in the areas of Human, Social, and Applied Social Sciences. In these areas, research from the most diverse approach methods coexist: empirical-analytical, phenomenological, dialectical-critical, systemic, and ecosystemic, among others (ARENHART et al., 2021). This coexistence does not represent passivity or the absence of contradictions and conflicts, but it indicates different epistemological positions, some in dialogue, others not so much. However, what is pointed out

here is the possibility of an epistemological option that enables dialogue between researchers who are part of research projects focused on the territorial approach.

For research groups, Minayo (2014) proposes the “triangulation of methods” as a possible alternative to carrying out a dialogue between different methods. Effectively, in all areas of knowledge, each method, by itself, does not have enough elements to answer the questions that a specific investigation raises. Hence the importance of interdisciplinary dialogue on methods for understanding reality from various angles. The methodological dialogue provides greater theoretical clarity and allows for deepening an interdisciplinary discussion in an interactive and intersubjective way. According to the author, the reflective process of method triangulation makes it possible to seek the articulation (unification and interdependence) of objective data (indicators, frequency distribution, and others) and subjective data (meanings, intentions, interaction, and participation). It is about avoiding or undoing the dichotomization between quantitative and qualitative, between macro and micro, between interior and exterior, and between subject and object.

In Minayo’s (2014) proposal, the method of triangulation process is based on three opposing and also complementary postures: (i) Deep respect for disciplinary fields; (ii) Relativization of the fragmented vision of each one of them; (iii) and Dialogical ability of researchers in facing different theoretical and methodological proposals and with subjects who work in the world of life. It should be clarified that triangulation does not preclude the development of theories, analyses, and publications specific to each researcher’s field of knowledge. However, the disciplinary production, resulting from the experience of triangulation, which shares the reflections of other areas, is able to overcome the monological effort of the individual and solitary researcher in the direction of the “inter-fertilization of knowledge”.

What is sought in this research is not a monist/unitary view, in which all research results would be subordinated to a single logic. “[...] We must work with a simultaneous plurality of different organizational principles of society” (translated from ASSMANN; MO SUNG, 2000, p. 148). However, in order to carry out research of this nature, complements Minayo (2014), it is necessary to establish some guidelines that allow and enable this triangulation and the inter-fertilization of knowledge, as a kind of script or frame of reference, built on the argumentative and fruitful dialogue between the researchers involved. This script or frame of reference starts to guide the actions of individual researchers and work groups. In this sense, the idea of a “progressive triangulation” was coined, as the process is constructed and reconstructed throughout the collective experience of the group involved. In large part, this is what was accomplished in this research experience that started in 2020, based on thematic seminars, work meetings, elaboration, and re-elaboration of texts, among others.

The recognition of the specificities of the different epistemological approaches (methods of approach), with their philosophical assumptions and their respective dominant operational logics, allows moving towards a “triangulation of methods” (MINAYO, 2014), without falling into eclecticism or monism, rather, seeking the “inter-fertilization of knowledge”. This posture can mean an important advance in studies and research on territories and territorial approach, still marked by fragmentation and the difficulty of advancing in terms of epistemological and methodological debates.

Das dimensões do patrimônio territorial ao IMAP: percurso metodológico

Each of the dimensions of territorial heritage (social, productive, cultural, natural, institutional, and human-intellectual) followed a methodological path for calculating the dimensional activation index, the sum of which will constitute the IMAP, highlighting the following aspects:

- i. Ontological: definition of the core of the dimension, the scope, and basic concepts;
- ii. Constitutive: design of the components of the dimension;
- iii. Indicative: definition of the variables of each component, identification of referents that allow the proposition of a scale for each component.
- iv. Regarding the indicative aspects, they will follow a reference framework, containing the following elements:
- v. Components: aspects to be taken as a reference for the definition of variables – e.g. in the social dimension – labor relations;
- vi. Variables: aspect or characteristic defined for analysis and measurement – e.g. in the social dimension – the percentage of formal and informal work;
- vii. Data collection techniques and/or tools: data search sources - e.g. in the social dimension, the General Register of Employees and Unemployed Persons (CAGED)

Constitutive elements of IMAP

The methodological proposal of proposing an index to analyze the activation of the heritage of a territory, the IMAP, goes through stages systematized below. To support the method, it is proposed to create a measurement scale, based on indicators referring to a certain aspect of reality, in each dimension.

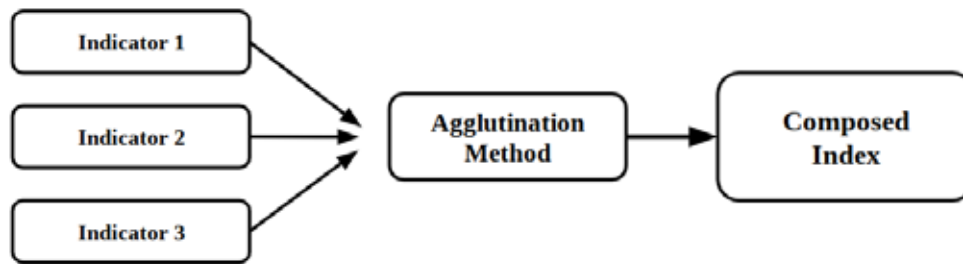
Following Januzzi's indications (2001), the following steps are proposed: (i) Elaboration of a reference framework, based on previously referenced concepts and theories, highlighting the components, their respective variables and techniques and/or data collection tools, for each of the dimensions; (ii) Proposition of a 5-point scale for each of the variables, of the respective components of each dimension; (iii) Generation of indicators for each variable that, aggregated, results in an index that reveals the level of activation of the territorial heritage of each of the dimensions; (iv) finally, The weighted sum of the dimensional indexes will result in the IMAP.

It is noteworthy that the indexes proposed for each of the dimensions can be formed by the aggregation of subjective indicators, according to Jannuzzi (2001), because they are of a qualitative nature and objective, quantitative indicators, based on concrete occurrences in the socioeconomic, cultural and environmental reality.

Sobral et al. (2011) reveal that the indicator communicates about the progression towards a certain goal, making a trend or phenomenon, not immediately detectable through isolated data, more noticeable. The aggregation of indicators makes up an index.

Januzzi (2001) corroborates this understanding by presenting Figure 2.

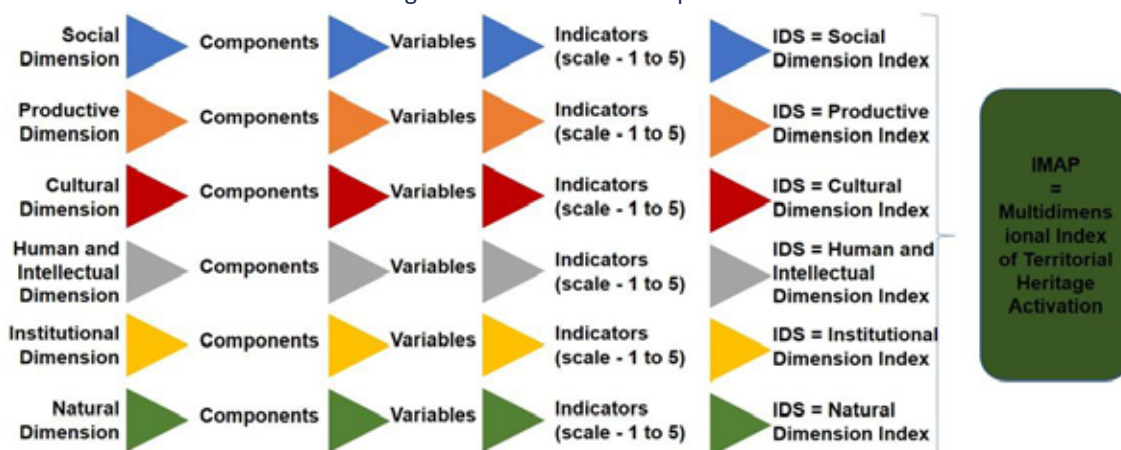
Figure 2 – Formation of an index



Source: Januzzi (2001, p. 22)

Thus, the IMAP is the result of a composition that begins in each of the six dimensions that shape the territorial heritage. Each of the dimensions is made up of components, which in turn can be measured by existing indicators (secondary data) or created to make the index viable (primary data). These indicators are valued on a scale according to the level of activation, which makes it possible to form the activation index for each dimension. The aggregation of the indexes of each dimension results in the IMAP, as described in Figure 3. For each of the variables, a five-fold scale will be created, from a situation of full activation to one of total precariousness.

Figure 3 – IMAP formation process



Source: Organized by the authors (2023)

The aggregation of the indexes of each dimension results in the Multidimensional Index of Territorial Heritage Activation-IMAP, as shown in Figure 4.

Figure 4– Aggregation of the partial indexes of the dimensions for the formation of the IMAP

$$IMAP = \frac{IDS+IDP+IDC+IDHI+IDI+IDN}{6}$$

6

Where:

- IMAP = Multidimensional Index of Territorial Heritage Activation
- IDS = Index that represents the Social Dimension
- IDP = Index that represents the Productive Dimension
- IDC = Index that represents the Cultural Dimension
- IDHI = Index that represents the Human and Intellectual Dimension
- IDI = Index that represents the Institutional Dimension
- IDN = Index that represents the Natural Dimension

Source: Organized by the authors (2023)

A scale of 1 to 5 is adopted, where 1 refers to a situation of maximum need and 5 refers to an ideal situation, therefore, optimal for the activation of each dimension of territorial heritage. The aggregation of dimension indexes, to reach the final index (IMAP), follows the same logic. The closer to 5, the more the territory has its assets activated. The closer to 1, the less the territory is activating its available resources in its development dynamics¹⁷.

In addition to presenting a synthetic diagnosis with the IMAP, the partial indexes express the peculiarities of each dimension of the territory, which is essential to guide public policies, programs, and actions in the territory that aim to activate the most fragile dimensions, as well as maintenance actions and/or potentiation of the most activated dimensions in the territory. The detailed methodological trajectory for the composition of the partial indexes of each of the dimensions - social, productive, cultural, human-intellectual, institutional, and natural - are presented in the articles that make up this dossier¹⁸.

In the aforementioned methodological route, it is emphasized that each territory presents specific dynamics and it is necessary to articulate this recognition with the performance of particular diagnoses, based on consistent theoretical concepts and assumptions. The complexity of the territory demands a systemic view of the dimensions that compose it, with the challenge of understanding its interrelationships, as proposed in IMAP.

FINAL CONSIDERATIONS

Once the elaboration stage of the proposal for a multidimensional methodological instrument, summarized in this text, has been completed, it now remains to define and operationalize the next steps, that is, to share the assumptions and proposal for a methodological instrument for the debate, and then carry out its pilot application in different territorial clippings, in order to proceed with its validation and subsequent final publication, with the purpose of becoming a reference in the research of territorial studies.

The execution of the stages of the ProPAT project, from the official beginning in 2021 until this publication, was carried out through virtual meetings, with the voluntary involvement of the members of the research team and the support of their institutions of origin. During the period, there was an unsuccessful attempt to access public resources to support the execution of the project. However, its publication and pilot application in different territorial cuts depends on access to public resources, which is expected to occur next.

Upon completion of the pilot application, the group will hold a face-to-face seminar with the participation of the entire research team, in particular, members of the universities participating in the process of applying the methodological instruments, together with consultant(s) specialist(s), in order to analyze the result of the validation process and make any necessary adjustments. After that, a new publication will be carried out, in the form of a physical book.

¹⁷The structuring of the scales followed technical guidelines traditionally suggested in the literature in general, for similar cases, and by reading the texts, with examples in each of the dimensions, it is possible to have a greater understanding of the subject in question.

¹⁸These are six articles published in this issue, referring to each of the dimensions, in which a detailed description of the proposal is presented.

Finally, it should be noted that the present proposal for a methodological framework presented components, variables, techniques to be used, and sources of data and/or information to be consulted, as well as scales, which could serve as comprehensively as possible, the different situations to be found in the territorial clippings to be analyzed. However, the need for adjustments to meet the specificities of each territory is recognized.

This is our journey so far (July/2023), which results in a methodological proposal that proposes to provide innovative contributions to advance territorial studies. The virtues of this proposal are highlighted while recognizing possible limitations. Such limitations, part of them, are expected to be identified in the “pilot application” that will be operationalized by the team next, in different territorial cuts. Other gaps and/or limitations, it is hoped, can be pointed out by specialists in the subject, through theoretical reflections and/or analysis of experiences. All of this in no way detracts from the Herculean effort made by a team of researchers over the past three years. On the part of the team that was involved in structuring the proposal, there is total openness to accept suggestions for improvement and, in future publications, contemplate revisions that prove necessary.

Finally, despite the epistemic-theoretical-methodological contributions provided by the ProPAT project, referred to here, it is understood that it is necessary to advance in relation to the study and investigation, in three aspects¹⁹: (i) deepen the theme of the epistemic-theoretical bases; (ii) seek possible approximations with schools of thought, and, (iii) rescue and evaluate methodological practices convergent with the “territorial approach to development”. This will be a new challenge to be faced next.

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¹⁹This should be the challenge of a new study and investigation process, which may occur, next, in parallel with the application and validation of the proposal presented here.

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