

ACTIVITIES AND PROSPECTS OF RESEARCH ACTIVITIES CONCERNING
TOOLS OF TERRITORIAL INTELLIGENCE FOR SUSTAINABLE DEVELOPMENT ACTORS

WORK PACKAGE 6 “TOOLS FOR ACTORS” OF CAENTI

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Résumé :

Cette communication fait état des activités de coordination réalisées par le 6^e work package « Outils pour les acteurs » de la CAENTI, Action de Coordination du Réseau Européen d'Intelligence Territoriale. Le WP6 concerne la conception et la dissémination des méthodes et des outils d'intelligence territoriale accessibles aux acteurs territoriaux respectueux de l'éthique du développement durable. En 2006, son activité est concentrée sur la définition des spécifications d'une valise « CATALYSE » à partir de l'expérience des participants de la CAENTI qui ont contribué au développement de ces outils depuis le début des années 1990. Les premiers mois de la CAENTI ont été consacrés à la définition des spécifications des contenus du guide de diagnostic et d'évaluation, outil déterminant de la méthode. Les résultats de cette recherche, qui font l'objet d'une communication distincte, permettent à présent d'orienter la recherche vers les protocoles de traitements statistiques et spatiaux et vers les spécifications des outils informatiques.

Summary:

This communication makes a state of the coordination activities carried out by the 6th work package “Tools for actors” of the CAENTI, Coordination Action of the European Network of Territorial Intelligence. The WP6 is linked to the design and dissemination of methods and tools of territorial intelligence accessible for the territorial actors and respectful of a sustainable development ethics. In 2006, its activity is focused on the definition of the specifications of a “CATALYSE” toolkit, starting from the experiment of the CAENTI participants, which contributed to the development of these tools since the beginning of the 1990s. The first months of the CAENTI were devoted to the definition of the specifications of the diagnosis and evaluation guide contents, which is a determinant tool of the method. From now on, this research results, which are presented in another communication, allow directing the research towards the protocols of statistical and spatial treatment and towards the specifications of the data processing tools.

Mots-clés: intelligence territoriale, partenariats de développement, participation, indicateurs, outils.

Keywords: territorial intelligence, development partnerships, participation, indicators, tools.

Activities and prospects of research activities concerning tools of territorial intelligence for sustainable development actors Work Package 6 “Tools for Actors” of CAENTI

“That all our knowledge starts with the experiment, it does not raise any doubt. [...] Thus, chronologically, no knowledge precedes in us the experiment and it is with it that all of them start. But if all our knowledge begins with the experiment, it does not prove all of it derives from the experiment. [...] Indeed, from what the experiment could draw its certainty, if all the rules, whereby it proceeds, were only empirical, and consequently contingencies?”

Immanuel KANT
"Critique of Pure Reason"
Introduction of the second edition (1787)

INTRODUCTION

The objective of the work package 6 of the CAENTI “Tools for actors”, abbreviated TOOLS, is the design, the execution and the dissemination of tools of territorial intelligence, on the one hand that are accessible for the territorial actors, and on the other hand that are respectful of a sustainable development ethics.

The WP6 directly contributed to the execution of the CAENTI general objective, which commits to integrate the present research projects on the tools of territorial intelligence, so as to give them a European dimension.

In the first time, this article will present the stakes that are linked to this ambitious and the organization that the CAENTI participants gave to themselves to reach it.

In this objective, the CAENTI members have fifteen-year common experience of the development, the experimentation and the use of the CATALYSE method and tools in various territorial contexts in Europe. In a second part, we will present the CATALYSE method, to which the WP6 contributors wanted to give a European dimension.

Then, we will evaluate the activities that were led in the WP6 framework since its starting on March, the 1st 2006, six months ago. A first result is a proposal of European harmonisation of the diagnosis and evaluation guide that will be briefly presented because a specific communication was presented on this topic.

Lastly, we will present, for the discussion, the research activity prospects of the WP6 partners.

The modelling of a European observatory of Elementary school is a WP6 activity. It integrates in the WP6 insofar as it is based on the French experiment of the observatory of rural school, which is an important reference for the Catalyse tools use. Nevertheless, it has its specificity within the WP6 and there will be a distinct present on this subject.

1. STAKES AND ORGANIZATION OF THE WP 6 “TOOLS FOR ACTORS”

The WP6 would like to contribute to two decisive aspects of the European development policies:
- management by project and evaluation
- sustainable development.

The European Union introduced very early the demand of project management and evaluation.

Since GOTHENBURG, in 2001, sustainable development has established the principles of good governance. Thus, the European Union reaffirmed the importance of the principles of participation, global and well-balanced approach and of partnership that have been in these call for projects for many years.

The CAENTI partners notices that, if scientific methods adapted to these principles are available for experts, the territorial actors still rarely have at their disposal simple and cheap tools to draft, manage, observe and value their projects.

Having noticed this, the WP6 aims at designing, executing and diffusing these tools at the European level, by combining two constraints:

- That its tools are accessible to actors of sustainable development;
- That they respect the ethics of sustainable development, especially the participation, global approach and partnership principles.

The territorial actors refer to the private, public and associative organizations, as well as to the people who, within these organizations, make actions that offer to the inhabitants, services that contribute to the equitable and sustainable development of territory. The principle of global approach, and its corollary partnership, imply the actors jointly act, in a coordinated way, within multi-sector partnerships, as the “development partnerships” of the Equal programme of the European Social Fund.

The multi-sectoriality imply economy, social, environmentalism, culture, to focus on large sectors. It introduces an important diversity of the actors, above all at the European scale where the corresponding policies often have very different histories. Thus, the actors can offer services that are more or less individualized in a broad range, from the services that have a collective dimension, in the public equipment settlement, to the individualized accompaniment, verily to assistance when the person's autonomy (physical, psychic, social or economical) does not give other alternative (temporarily or permanently), as in the social or sanitary sector.

These actors can be professionals or voluntaries. We can also distinguish the "first line" actors who directly take care of the persons –users or customers- and the "second line" actors who offer services to other actors.

The scientific tools and the information and communication technologies (ICT), which are these tools vector, allowed:

- Improving the projects management and evaluation;

- Developing the information sharing and the collaborative work that is indispensable to partnerships;

- Improving the information access that is indispensable to participation.

Nevertheless, their use remains insufficient in most of the activity sectors, and it is above all spread in an unequal way, as well as the necessary competences.

Sustainable development that « *meets the needs of the present generations without compromising the ability of the future generations to meet their own needs, in the field of environmental protection, economical growth and social equity* ». [BRUNDTLAND Report, 1987] is a popular cause. Nevertheless, the distance remains important between the adherence in principle and the effective implementation of the participation, global approach and partnership principles.

The economical conditions do not always allow the actors appealing to specialized providers, who are moreover not very developed in these sectors. The cooperation with the universities, in the framework of the research-action, is an important way for the actors to find adapted tools, expertises that are useful to implement them and a training that allows using them in an autonomous way. As regards the universities, they find research problematics in resonance with the economical and social evolution, the possibility to meet an important social demand and the opportunity to train the future professionals in the sectors that are linked to

sustainable development and to the assistance to persons.

Thus, the WP6 is fed within the CAENTI by other two research activities:

- The WP4 "Fundamental methods" that offers technological solutions that come from the research generic tools.

- The WP5 "Governance principles" that values these solutions acceptability in reference to sustainable development, especially in a first time to the principles of participation, global approach and partnership.

The WP6 is also organized to give a European dimension to the research actions on the tools for the actors and that contribute to the constitution of data bases of territorial knowledge. These research activities essentially started at the local level, particularly within the CAENTI. They are sometimes led at the national networks level, but they will have to find their critical mass at the European level.

In a first time, the WP6 programming planned a European harmonization of the CATALYSE tools that are used by most of the participants of the CAENTI in varied territorial contexts and that concern diversified publics. The objective is to make a synthesis of local experiments and to make the tools in harmony with the European standards, as far as possible.

The specifications definition that allows this homogenization at the contents and tools level is the intermediary objective for the first period that goes from March 2006 to February 2007. At this point, that corresponds to the mid-term, the WP6 essentially coordinated the homogenization of the contents of the diagnosis and evaluation guide that is the basic tool of the CATALYSE method.

The execution of these tools, under the form of a toolkit, will be able to be made on the base of these specifications during the second period from March 2007 to February 2008. This one also plans the putting online of the diagnosis and evaluation guide. Beyond the CATALYSE method, the WP6 also aims at identifying and valuating complementary tools of territorial intelligence or new ones.

The execution of a European portal of territorial information that allows feeding these tools with the available public data, is planned for the third and last period, from March 2008 to February 2009.

Eight coordination groups were constituted according to this programming:

The WP6C group [CATALYSE contents], coordinated by Celia SÁNCHEZ LÓPEZ, of the University of HUELVA (Spain), started the definition of the specifications of the contents of a CATALYSE toolkit at the European level. It presented a first set of specifications for the diagnosis and evaluation guide.

The WP6P [CATALYSE Programming] group, coordinated by Cyril MASSELOT, of the University of Franche-Comté (France), works on the technical specifications concerning the tools execution. It started a first comparison of the CATALYSE tools that are used on the different sites. It concretely worked to make a first tool of synthesis at the national level for the network of the ACCEM reception centres of migrants. From now on, its activity depends on the specifications about the contents and their treatment protocols.

The WP6G [CATALYSE Guidance] group, coordinated by Maria José ASENSIO COTO of the University of Huelva (Spain) works on the drafting of a CATALYSE guidance notes. Its activity strongly depends on the definition of the specifications of the contents and of the tools. It started the detailed definition of the contents meaning. We should discuss the organization to be adopted to gather the elements on the treatment protocols of the indicators, the use and the uses of the tools.

The WP6F [IIAF Contents] will be coordinated by Maria José ASENSIO COTO, of the University of Huelva (UHU) during the second period so as to define the contents of an online accompaniment file of inclusion itinerary based on the contents of the CATALYSE toolkit with the new online version.

The WP6D [IIAF Development] group will be coordinated by Cyril MASSELOT, of the University of Franche-Comté (France) during the second period. It will define the specifications for a treatments and edition chain of territorial information, from the gathering to the online publication of the results, with the same concern of harmonization between the personal tools and the online tools.

The WP6I [Portal Indicators] group, coordinated by Guénaél DEVILLET of the University of LIEGE (Belgium) will be in charge of the study of the specifications of the contents of a European portal of territorial indicators during the third period.

The WP6S [Territorial Information System] group, coordinated by Cyril MASSELOT, of the University of Franche-Comté (France), will establish during the third period the technical and data-processing specifications of a territorial

information system, which allow integrating all the tools of territorial intelligence and the useful information. The initiated research actions direct towards a community system of territorial intelligence [GIRARDOT, 2006].

Lastly, the WP6E [EOES], coordinated by Yves ALPE for the University of SALERNO, studies the feasibility of a European Observatory of Elementary School. It will work during the three periods to mobilize a sample group of European schools, study the feasibility conditions of this Observatory from the experiment of the Observatory of Rural School, and then integrate the sample group within a first network to experiment and evaluate this project.

The following planning summarizes the estimated programming of the WP6.

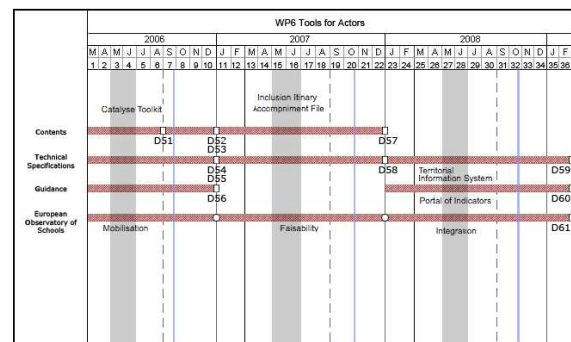


Diagram 1: WP6 Planning

The deliverables of the first period are:

[D51] Specifications of the contents of a European diagnosis and evaluation guide. It was published at the end of August 2006 on the base of a first project of European guide that was established at the end of May 2006. Then, this report was completed according to the research activities that were led at the contextual indicators and at the technical specifications level [SANCHEZ LOPEZ, GIRARDOT, 2006] Planned for the end of December 2006:

[D52] Specifications of the contents of a territorial repertory of services.

[D53] List of territorial indicators available on Internet to make a comparison with the data of the "CATALYSE" guide.

[D54] Technical specifications of the "PRAGMA" software of data gathering and of quantitative treatment.

[D55] Specifications for the integration of "PRAGMA" software with the software of qualitative data analysis "ANACONDA" and "NUAGE".

[D56] Elements for guidance notes of the "CATALYSE" information and tools.

2. CATALYSE METHOD

The CATALYSE method was designed and developed by Jean-Jacques GIRARDOT in the University of Franche-Comté, since 1989, in the framework of the Model Action AM-15 of the “Third European Programme of Fight against Poverty”, which later called "MOSAÏQUE”, so as to evaluate the actions that were led in this project. Évelyne BRUNEAU who was the chief of the project AM-15, Isabelle MOURET who is presently General Secretary of the Institute of Humanities and Social Sciences, and Cyril MASSELOT who is now Lecturer in Information and Communication Sciences were the main artisans of its development.

The CATALYSE method progressively diffused at the actors’ request and with their cooperation. They were generally “first line” actors coming from civil society, who wished to act in a concerted, multi-sector way, not only on the base of their competences, but initially of the actors’ needs. Cooperations between actors and researchers generally emerged during European projects. [DELVOYE, GIRARDOT, 2005].

When the economic and social crisis started in the 1970’s, the individual situations of the poorest people in Europe became more complex and more diversified, with an accumulation of difficulties. Social exclusion and economic precariousness showed the limits of the social protective system that was acquired from the "Welfare State”.

Facing this complexity and the diversification of the individual situations, the employees of the sanitary and social services who were specialized by intervention sectors, felt the need for having tools that allow better apprehending the problems diversity that some one could feel, at the individual and family level, as regards social protection, health, employment, housing, formation, mobility, etc.

The CATALYSE method offers diagnosis, evaluation and observation tools that are accessible to the local actors of the sustainable territorial development. These tools are useful to draft relevant development projects, to efficiently manage these projects, then to value them and to estimate their impact. These tools that are intended for the actors of sustainable development respect and favour the principles of participation, global approach and partnership. They facilitate the mobilization of development partnerships that are composed of professionals who work in public services, private organizations and active voluntaries in associations. They guarantee a participative animation of the partnership.

2.1. CATALYSE methodology and tools

To make tools that are accessible and useful for actors, CATALYSE adapts fundamental methods and generic instruments of wide-applicability. They are methods of statistical and spatial analysis of the data, the project management and evaluation protocols, the knowledge bases, the systems of scientific and technical edition, the geographical information systems, which use the information and communication technologies. CATALYSE particularly uses the friendly software that are designed for the researchers in humanities and in social sciences which were made by the TheMA research team in territorial intelligence:

- The PRAGMA software that allows making quantitative examinations of surveys;
- The ANACONDA and NUAGE software that allow making a quantitative analysis of data; they combine factorial analysis of correspondences and ascendant hierarchic classification;
- The territorial information system SITRA, that was designed in partnership with the Computer science Laboratory of the University of Franche-Comté. [GIRARDOT 2006]

The CATALYSE method confronts three kinds of information and, to do so, it uses three series of tools, according to the following diagram in which the grey zones refer to the fundamental tools:

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Diagram 2: The CATALYSE method

1. The diagnosis and evaluation tools mutualize and process the multi-field individual information to define needs profiles and to measure their importance, in order to offer the services that are adapted to these needs. Then, the same tools are used to value the actions that provide services to people. These tools are the following ones:

- The diagnosis and evaluation guide gathers the individual information according to a multi-sector approach. This guide is divided into themes that include several questions. To make the guide

exploitation easier, each question has a closed nature: it allows choosing between several answer modalities.

- A specific version of the PRAGMA software calculates quantitative dashboards.

- The software of multi-criteria qualitative analysis ANACONDA and NUAGE make a typology of people according to their needs profiles.

2. The services repertory is a up-datable and online available for consultation data basis. It makes an inventory of the services to people that are accessible to the territory inhabitants. Each service is described thanks to a form which contents are structured in themes, descriptors and modalities, as the guide. The correspondence between the guide questions and the repertory descriptors allows comparing the diagnosed needs and the inventoried services. This confrontation between demand and offer allows valuating the relevance of the existing services and identifying the missing services, so as to adapt the services offer to the expressed needs.

3. The **territorial indicators system** integrates a selection of information with a socio-economic nature that describes the territory and the territorial community. These data are constituted and provided by the statistical services of specialized institutions. Some indicators are accessible online. The system of territorial indicators publishes needs, services and territorial indicators maps. They allow comparing the needs territorial distribution with the services territorial distribution and possibly with the territorial indicators to optimize the services localization.

The PRAGMA and ANACONDA software are also used to analyze the contextual services and indicators, at the quantitative and qualitative levels.

2.2. Development partnership and participative governance

Catalyse also offers a participative governance of the sustainable development partnerships.

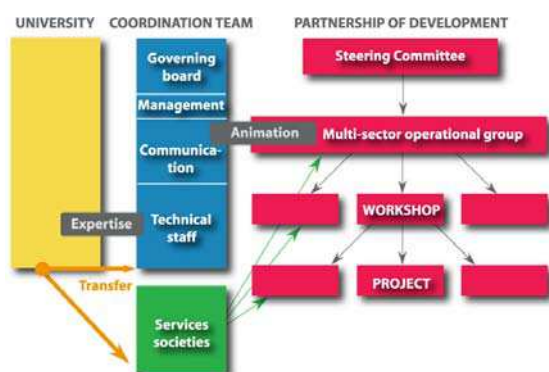


Diagram 3: CATALYSE territorial governance

Operational group

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

Workshops

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

Projects

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

Cooperative observation

The partnership also guarantees the results publication, firstly on an extranet website that is intended for the partners, and then on a public Internet website.

The diagnosis execution, its regular repetition, the constitution and permanent updating of the repertory and of the contextual indicators feed a shared and participative information system.

2.3. CATALYSE observatories

In 1990, all the CATALYSE tools (guide, repertory and contextual indicators) were drafted within the framework of the "MOSAÏQUE" AM-15. The method name aims at showing that it is a tool at the service of the partnership and participative action, a catalyst which initiates a more important reaction of which it is not the objective at all, but only the additive.

In 1994, the University of Huelva used the CATALYSE method to make the “Social Map of HUELVA”. This diagnosis was the argument of the European project URBAN “HUELVA en acción” (1995-1999), of which an action was the constitution of the “Local Observatory of Employment”, OLE, in the University of HUELVA.

Since 1996, the CATALYSE method was used by twenty territorial multi-sector partnerships in Europe, in relation with different and varied territories and publics.

Catalyse was experimented and developed in the framework of the following diagnostics, evaluations and observatories:

Employment Observatory of Huelva (Spain)
<http://ole.uhu.es>

National observatory of migrations GORRION of ACCEM (Madrid, Spain) <http://mti.univ-fcomte.fr/accem/>

Observatory of Rural School (ORS), www.grenoble.iufm.fr/rural/

Observatory of migrations ODINA in Asturias (Gijon, Spain): <http://www.odina.info>

Observatory of the migrations in a rural area OPASI of Sigüenza (Spain) <http://mti.univ-fcomte.fr/siguenza>

Observatory of migrations OPAGU of Guadalajara (Spain)

Eugenia Project, Ecos Ouverture programme, <http://mtiba.univ-fcomte.fr/eugenia/>

Inter-commune observatory of Ormansag (Sellye, Hungary), <http://ormansag.celodin.hu/>

Website of the resources of the so-called “town policy” (France), <http://www.i.ville.gouv.fr>

Website of Equal IDREM, <http://adoc.univ-fcomte.fr/idrem/>

National Unit Leader Plus, Belgium, <http://www.unleader.be> and Walloon Animation Cell, <http://www.leaderwallonie.be>

Inter-commune observatory INTEGRA for the inclusion in rural area of Durbuy (Belgium), <http://www.integraplus.be> and Equalux project (Province of Luxembourg), <http://mti.univ-fcomte.fr/integradh/>

Community observatory OPTIMA of Seraing (Belgium), <http://www.optima-obs.org>

Development partnership “Exigence” in Franche-Comté (France), <http://www.exigence.org>

Transnational partnership IRIS, <http://www.iris-equal.info/>

Development partnership Equal Mediation (France)

Design of the OSUA Adapei system

Development partnership Equal of the Jardins de Cocagne (France)

Observatory of migrations of Sevilla (Spain)

Observatory of migrations GOL of Leon (Spain)

Observatory of migrations of Valencia (Spain)

Observatory of migrations of Oviedo (Spain)

Observatory of migrations of Girona (Spain)

Observatory AM-15 of the Doubs Model Action of the Third European programme of fight against poverty, 1989-1994, Besançon. Evaluation about the economic and social inclusion of 2717 persons over four-year duration.

Shared diagnosis of the Concerted Action of Pontarlier

Preliminary diagnosis of the Doubs Departmental Inclusion Plan, 1994, cooperative diagnosis that was made by a hundred of partners of the social services with 8897 precarious households.

Mosaïque observatory, 1995-1999, Doubs department, Besançon, France

Mapa Social de Huelva, shared diagnosis

Evaluation of the Boutiques Solidarité (Solidarity Boutiques) of the Abbé-Pierre Foundation, 1995 (90135 passages of homeless people)

Diagnosis of the Mission for Inclusion of the Charleroi Region (itineraries follow-up)

Diagnosis of the Yonne Inclusion Institute, March 1996, Le Phare (1459 people)

Observation and Evaluation systems are presently made in the framework of EQUAL framework, in Franche-Comté with several organizations (ADAPEI, MEDIATION, Jardins de COCAGNE) that lead socio-professional inclusion actions.

3. REALISED ACTIVITIES

Most of the CAENTI consortium actors use the CATALYSE method, with the support of universities, which provided them their territory knowledge and their methodological competences. They firstly made a synthesis of their experiments, to define together a “CATALYSE toolkit” that offer a diagnosis and evaluation guide, a territorial repertory of services and a selection of contextual indicators. In the three cases, they want to harmonize the indicators of general use and to put them in conformity with the existing European standards. This project objective is to offer to the territorial actors useful tools to understand the complexity and the diversity of the individual situations in order to work out, to manage and to value multi-sectors projects that respect sustainable development.

At the contents level, the synthesis concerned the indicators that are used by most of the actors, at the guide, repertory and contextual indicators level. Each local partnership worked out its contents according to its objectives, to its representations, to its practices, to its institutional environment and to its regional context. However, the underprivileged populations live situations which global dynamics

are often close, even if they are locally expressed with a strong diversity. Consequently, it was possible to bring closer many indicators and to homogenize their formulation by focusing in last authority on the European standards to suggest a European selection that could be used at the local scale. Thus, it allows making comparisons between territories and in relation with the European indicators. Each local partnership did not use all the suggested indicators by the European guide. The specific indicators were generally rejected, except when their interest was recognized by most of the other partners.

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

It is also the occasion to harmonize the indicators with the European standards, and even international when it is possible.

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

The "CATALYSE Toolkit" does not aim at constituting a "turn-key" tool. It is addressed to the actors who want to carry out together a multi-sector diagnosis of their publics needs, then valueate the relevance, the efficiency and the impact of the actions they implement to satisfy these needs. Its objective is to present an indicators selection within which these actors will be able to operate their own selection.

The interest of each of the suggested indicators is located in the following points:

- It is of general use in a multi-sector approach;
- It was defined in a concern of European harmonization;
- It is coherent with the European standards when there are some;
- Its treatment protocol will be described step by step;
- The tools allowing making these treatments will be freely available and easy to use.

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

More practically, a comparative research action was made on the selection coordination and the contents and tools harmonization. It was animated by the WP6C, WP6P and WP6G coordination groups. They confronted the CATALYSE indicators and tools that are used by the CAENTI consortium actors, in various territories of Europe.

This synthesis concretely harmonizes the indicators and the tools that are used by OLE, VALDOCCO, ACCEM, OPTIMA, INTEGRA, ADAPEI

This work was carried out during scientific coordination meetings between the University of Franche-Comté and

- the University of HUELVA, the Foundation VALDOCCO and the association ACCEM to harmonize the Spanish guides;
- the University of LIEGE, and the observatories OPTIMA and INTEGRA to harmonize the Walloon guides;
- The association ADAPEI and the Réseau des Jardins de Cocagne, with the contribution of the EQUAL MEDIATION project, in France.

All the guides of the ACCEM observatories of migrations, i.e. of the national observatory that is called GORION and of the local observatories of GIJON, OVIEDO, LEON, SIGUENZA, GUADALAJARA and SEVILLA, were harmonized in a "CATALYSE Migrants" version, which preceded the European guide and which allowed a first experimentation of modeling and of instrumentation of the treatment protocols.

Since the beginning of the CAENTI action, the research actions that are coordinated within the WP6 framework are organized on the base of the diagnosis and evaluation guide. Indeed, the guide is the basic tool of the CATALYSE method. Respectful of sustainable development, the latter is based on the persons' needs satisfaction. The guide indicators are defined to identify these requirements whilst making the restitution of their complexity and their diversity. The evaluation of the actions and services that are used to satisfy them implies a comparison between the needs and activities indicators that are able to satisfy them and the activities they offer. Then, they jointly face the territorial indicators. Thus, the services indicators definition and the territorial indicators firstly depend on the definition of the guide indicators, even if an harmonization process must then take place according to the treatment protocols and to the technical constraints.

This synthesis work led to the selection and the formulation of the indicators of the CAENTI European guide. As of May 2006, the WP6C

coordination group made a first proposal of European guide which specifications were presented in a first report “European contents specifications for a CATALYSE guide for diagnosis and evaluation” (Deliverable No 51), which was published at the end of August 2006. Celia SANCHEZ LOPEZ coordinated and animated this synthesis at the time of a doctoral practice in the Institute of Humanities and Social Sciences of the University of Franche-Comté. She provided an important work of harmonization with the European standards (and sometimes international ones); she started working from a study about the official European statistical servers.

This work quickly led to a first series of definitions that were presented by the WP6G coordination group. The debate about the definitions, the treatment protocols and the tools, continued on CooSpace. It presently leads to a new formulation of the guide, which is attached. It is strongly inspired by the first results of the experimentation of the “CATALYSE Migrant” guide within the ACCEM observatories. This experimentation allowed taking into account the exploitation technical constraints that are inherent in the tools that were adapted by the WP6P group. The indicators selection did not evolve much, but the questions formulation was improved.

We will not develop here the results of the harmonization of the diagnosis and evaluation guides that are used by CAENTI actors. These research activities led to a first proposal, they are presented in a specific communication “Content specifications of the European diagnosis and evaluation guide” [SANCHEZ, GIRARDOT, 2006] that will be introduced by Celia SANCHEZ LOPEZ. This communication details the objectives, the methodology, the functions, the structure and the contents of the European diagnosis and evaluation guide. In this communication, we only summarize the most important points for a global understanding of the WP6 activities.

The diagnosis and evaluation guide is the basic tool of the CATALYSE method. It allows identifying the global needs of a person or, by aggregation of individual guides, of a group of people. Then, it allows valuating if the available services are relevant, i.e. if they are adapted to these needs, then if they are efficient, i.e. if they satisfy these needs and at which cost. The comparison with territorial indicators is useful to value the services impact.

It is called “guide” because it is intended to be used within the framework of interviews, but it has a structure of questionnaire, in order to facilitate its exploitation and to simplify its use.

The guide uses indicators to describe a person’s situation and needs, according to a global, multi-sector approach. These indicators are filled in at the time of interviews between the concerned person and the actor(s) who accompany/ies him.

To allow the guides regrouping and their data-processing exploitation, the indicators are formulated under a questions form, and the guide is structured like a questionnaire. If it has the disadvantage of conditioning the answers according to preset modalities, this form has two advantages: it creates a common language and it allows a quick, documented and consequently exploitation that is accessible to everyone.

This first proposal of European guide has basic specifications. It should now be completed by definitions and treatments protocols. The latter should be instrumented according to specifications to be defined. It is the first step of an harmonization effort, which result remains to be tested.

The European guide eventually gathers 105 indicators-questions. It will be modified in the short term with the treatment protocols definition and instrumentation. It will evolve in the longer term according to the changes that affect the people’s situations and the intervention programs. Specifications will specify a protocol that will guarantee an harmonious evolution, that will allow a genuine follow-up in the long term and that will limit the data loss.

4. PROSPECTS

This part of the communication initially presented organization proposals of the work package 6 activities until December 2006, in the prospects of the deliverables drafting. It was up-dated after the debate.

The proposal of European guide is an important base of work for the WP6P and WP6G coordination groups. Convergences also appear about the contextual indicators with the WP4I coordination group, which made an important work about the territorial information on the European territories and available on Internet. New prospects also result from the evolution of the actors’ projects.

Nevertheless, the WP6C coordination group has not finished its work, as we should finalize the suggested specifications according to the questions definitions and to their treatment protocols, to the comparison between the repertory contents and the contextual indicators, and to the tools technical specifications. Even if the CATALYSE tools experiment certainly allowed anticipating and limiting these corrections, it is not possible to

foresee them according to the national and regional disparities. Besides, the WP6C group largely initiated the indicators definition as one goes along their harmonisation. That is why it will participate with the WP6G to the deepening of the meaning of the guide questions and modalities, and then of the repertory information. It will make the list of the questions it would be advisable to compare with contextual indicators in relation with the WP4I coordination group that makes an inventory of the territorial information.

The WP6G coordination group cooperates with the WP6C group to define the repertory contents and the contextual indicators for which the scientific and technical constraints are stronger.

As regards the technical specifications, the WP6P group already made a PRAGMA version that integrates the CATALYSE ACCEM "Migrants" guide. This guide is already an important synthesis of the guides that are used by four observatories on migrations in Spain (GIJON, SIGUENZA, OVIEDO and GUADALAJARA). Even if this synthesis remains limited to Spain and to a kind of public, it concretises a multi-sector harmonization effort at the national scale. It could be implemented at the level of three former observatories and of two new one, those of SEVILLA and LEON, what allows quickly testing a PRAGMA version that prefigures the one that will be used for the European guide that will be drafted by the CAENTI. It is a version which is adapted to the gathering. Its use was strongly simplified so as to avoid the manipulation errors. It is accessible to all the users, because, apart from the guide contents knowledge, it is sufficient to be trained to elementary data-processing actions.

The CATALYSE «Migrants» guide is also a reference for the specifications definition:

- Of an online PRAGMA version, epragma, of which a prototype, also limited to the key-in, will be made so as to make a first series of tests
- Of a PRAGMA multi-platform version that works on all the systems and that is developed with free software and in JAVA

The objective is to make parallel tests between the online version and the multi-platform one so as to determine the specifications of a common data-basis, or at least, of bases that can easily communicate, as a computer and an electronic planner. Indeed, in many partnerships, the physical conditions of access to Internet are unequal in space and time. Consequently, it is interesting to be able to jointly use several solutions, on condition that the data bases synchronisation is transparent for users.

If these activities were recently initiated and are still essentially prospects, the drafting of the integration specifications of the PRAGMA, ANACONDA and NUAGE software progressed and a communication will be presented on this topic in the Conference workshops [GIRARDOT, 2006].

From now on, an important activity will mobilise the WP6G coordination group to:

- Specify the contents definition: guide indicators, repertory information and contextual indicators;
- Specify the guide treatment protocols;
- Specify the method and the CATALYSE tools uses.

The guide indicators definition was initiated by the WP6C group which is about joining the WP6G so as to avoid the dispersion at the cooperative work spaces level. This activity proved itself to be heavy as we should define a common language, in fields where the national and regional disparities remain important. That is why three sub-groups were organized, in France, Spain and France, to progressively make national harmonisations before the European level. In relation with the initial ambition of the CAENTI, which is harmonising the three tools contents –guide, repertory and contextual indicators, at the European level during the first period, the objective of harmonising the guide indicators is more realist, as the repertory information and the contextual indicators will be determined in articulation with the guide questions.

The definition of the guide treatment protocols started, by synthesising the practices of the different actors. Each observatory will describe the process it used for the latest diagnosis treatment it made. These processes will be harmonised at the CAENTI three sub-groups level. It should allow defining the general steps of the guide treatment process from which the treatment protocols of each indicator will be able to be defined, by confronting step by step the processes that are described by each observatory.

The execution of guidance notes of the tools was postponed to the second period. It is not a complex task as notes were made for a simplified version of PRAGMA «Migrants». Firstly, we should experiment these first notes that are implemented at five observatories level, of which two are new ones, and to complete it when the tools will have been finalised because the executions went past the projections at the technical developments level and we can hope a quick instrumentation of the treatment protocols, even of the online ones.

The uses definition also started with the drafting of histories that retrace the development of the CAENTI observatories and that try to draw use

recommendations so as to progressively make a general synthesis, also from intermediate syntheses at the national sub-groups level.

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

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

Then, we took contact with the W4T which thinks about the concept of territory, about the thematic of the relevant territory or the one of the difficulties the multiplicity of sector cuttings create for the multi-sector partnerships to confront territorial information.

We can also underline a parallel between observatories histories of the observatories that were created by the actors and the research-action experiments that were made by the researchers in the framework of the work package 5 on the governance principles.

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

CONCLUSION

The work package 6 made decisive marches, especially with the publication of a European diagnosis and evaluation guide. The harmonisation effort of this first proposal should be continued according to research prospects to which it provides a solid reference.

The most detailed definition of the contents, the modelling of the treatment protocols, the tools technical possibilities and constraints will soon lead to amend it, as well as the work packages 4 and 5 contributions at the analysis fundamental methods and governance principles level. It is still an experimental guide. A close version was already

implemented and it will certainly allow improving it soon.

The technical aspect is developing in advance on the forecasts, partly thanks to this opportunity to experiment new solutions, as the online tools that were planned for the second period.

On the other hand, the contents specifications will require more time than a period. Our programming was too optimistic. It did not take into account that the comparisons and confrontations follow one after the other whereas we imagined being able to make several ones at the same time. Likewise, the European synthesis includes intermediate steps as the quick constitution of national sub-groups, which allowed close actors making a first synthesis before progressively making a more abstract synthesis that implies more impersonal tools, shows. It is true that these steps did not slow down the definition of a first guide, but it is a very concrete tool for the actors. The contents definition harmonisation, the treatment protocols modelling and even the use recommendations are more technical and abstract operations that we will have to ingrain in the experimentation reality. This activity, which is in progress, will require more time than what we planned.

The actors' and researchers' mobilisation is not questioned. The acquired results at the level of the specifications about the contents, especially at the European diagnosis and evolution level, result from a deep participation of the CAENTI territorial actors and of the researchers who were strongly involved in the groups coordination.

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

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

The researchers were strongly involved in the coordination in this comparative research action. Celia SANCHEZ LOPEZ made an important work on this topic, but it was also the case of Julien CHARLIER and Di CHEN in the University of Liege, Maria José ASENSIO COTO in the

University of Huelva and Cyril MASSELOT in the University of Franche-Comté. The coordination was firstly made at the national scale –some would say at the regional one, at the sub-groups (composed by actors and researchers) level. These sub-groups appeared with the CAENTI. The actors came with their experiment and the researchers brought a new look, their documentary competences and their ability of analysis and abstraction, which strongly contributed to the execution of a European synthesis, whereas we started from extremely various local contexts. The actors also cooperated the ones with the others. OPTIMA and INTEGRA jointly made and drafted some syntheses. The ACCEM observatories, which have a strong individuality, harmonised their diagnosis and evaluation guides and they very quickly implemented the made synthesised guide. They divided up the drafting of first notes between them. These intermediate coordination, which have a linguistic origin, are also linked to differences at the intervention devices and publics level. They were stages that did not handicapped the general synthesis but on the contrary that helped to do it. All the actors and the researchers who are involved in the WP6 participate to this general synthesis, even those who did not belong to any sub-group, and there are strong individual as the ADAPEI or the University of ALBA IULIA ones. Periodic meetings, which are regular at the sub-groups level and punctual at the work package one, and the cooperative workspace play an important role in this dynamic.

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

Lastly, if all the partners cooperate to the modelling of the CATALYSE method, it does not handicap seek for new solutions and original contributions. The organisation of the international conference in two parts, one of them being constituted by communications that recounts the CAENTI activities and the other being open to the individual proposals, favours this dynamic where the contribution to the general effort does not handicap originality. The conference of ALBA IULIA was an important moment to evaluate the situation of many activities and to reorganise their convergence from these bases.

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