

“PROGRESS AND PROSPECTS OF THE WP6 "TOOLS FOR ACTORS"”

CAENTI Work Package 6

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Summary: This paper presents the progress and the results of the main research activity of CAENTI, the so call work package 6, that aim at designind and disseminate of methods and tools of territorial intelligence accessible for the territorial actors and respectful of a sustainable development ethics. WP6 works on the contents, tools ans use of the territorial intelligence observatories. In 2006, it drafted the specifications of a CATALYSE Toolkit, a ready-to-use set of documents and tools. It 2007, it started the specifications of an individual accompaniment file and those of a territorial information system accessible to actors. A chain of standalone and online tools of data statistic ans spatial analysis were integrated.

Keywords: territorial intelligence, territorial planning, information systems, accompaniment file, territorial diagnosis, evaluation.

INTRODUCTION

The work package 6 "Tools for actors" -WP6 TOOLS- essentially aims at giving a European dimension to research actions on technical tools for the actors and on territorial data sets that are widely started at a local level or even at a national scale.

It strongly contributes to the CAENTI global objective: integrating present research actions on the tools of territorial intelligence to give them a European dimension.

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

In 2006, it started at modelling the CATALYSE method that has been used for several years by most of the CAENTI participants in multi-sector observatories. The latter ones use similar tools but collect and process different information contents, that were harmonized according to European standards, thanks to three coordination groups:

- **Wp6c** drafted the contents specification of European multi-sector diagnosis and evaluation guide, service repertory and territorial indicators.
- **Wp6p** defined the specifications of the tools.
- **Wp6g** drafted the meanings of the question of the guide and the global processing protocols of these questions. It described five development partnerships and three observatories among CAENTI actors. It began at elaborating recommendation for the use of CATALYSE tools in the framework of development partnerships.

The three coordination groups joint efforts in order to harmonize contents and tools then in a "CATALYSE toolkit. Since April 2006, it was tested in the context of the red of local migrants observatories animated by ACCEM.

Part 1 will present the main results in 2006 as starting point.

In 2007, the WP6 started at integrating the CATALYSE tools and facilitating their access on Internet. It began at:

- Defining the specifications of an online "file", an individualised Inclusion Itinerary Accompaniment File, in **Wp6f**.
- Drafting the specifications of the tools in the framework of the processing and editorial chain from data collecting to results publishing, in **Wp6p**.
- Organizing a survey of the projects of territorial intelligence in Europe, in **Wp6u**.
- Studying the feasibility of a European Observatory of the Elementary School (EOES), in **Wp6e**.

Part 2 will show these progresses.

These two objectives prepared the specifications:

- of a portal of territorial indicators by **Wp6i**.
- of an Territorial Intelligence Community by **Wp6s**.

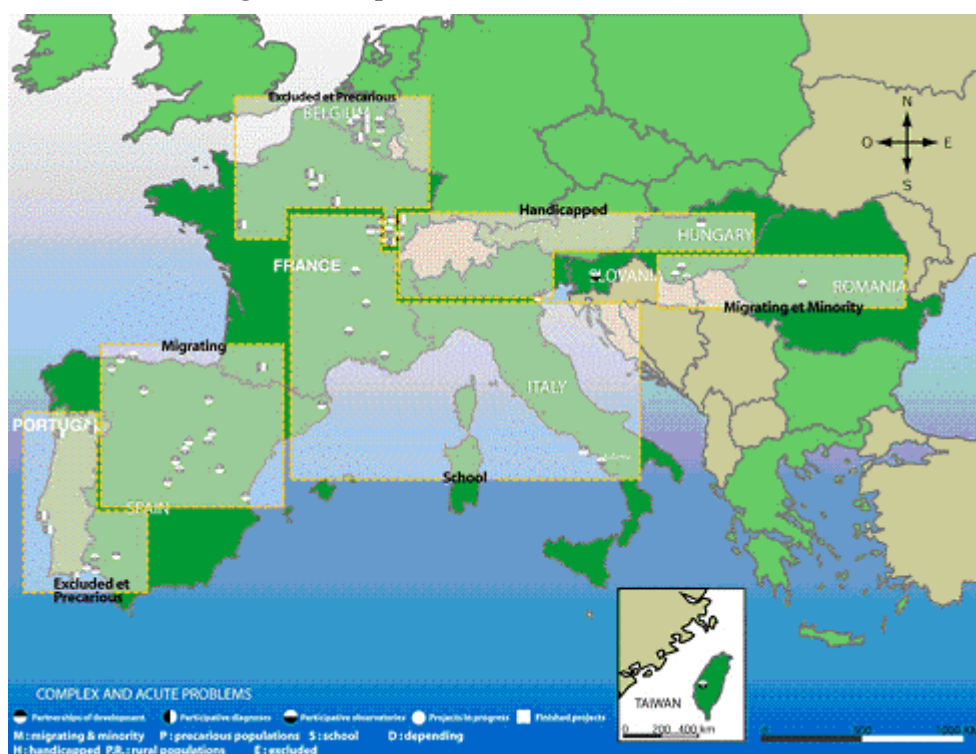
Part 3 will quickly summarized the prospects of these groups et of the new Wp6u group as they were discussed in the HUELVA conference.

1. RESULTS OF 2006 AS STARTING POINT FOR 2007

In 2006, WP6 firstly, it modelled the CATALYSE method, tools and governance. CATALYSE is a method of territorial intelligence that puts the information technologies, mainly the spatial analysis ones, at the service of the territorial development actors, whilst respecting the sustainable development principles.

The so called CATALYSE observatoriess, are generally initiated by an actors' multi-sector partnership, to better know the individual and collective needs and to act together more efficiently.

Diagram 5: Map of the CATALYSE observatories.



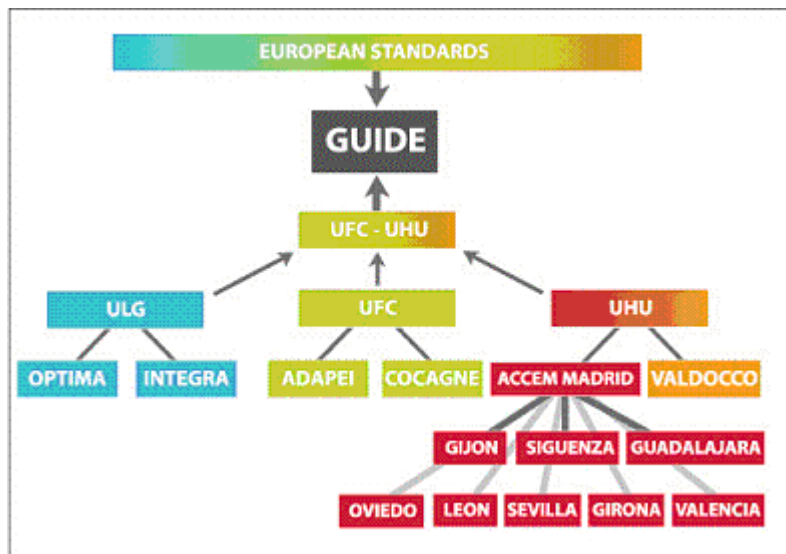
The CATALYSE contents, tools and uses were drafted from experiences, thanks to regional coordination steps:

- The University of HUELVA, ACCEM and VALDOCCO to harmonize the Spanish guides. For the guide, a first Spanish digest, called “migrants” guide, was suggested by ACCEM.

- OPTIMA and INTEGRA harmonize the “Walloon” guides with the University of LIEGE.
- ADAPEI and COCAGNE in France, with the University of Franche-Comté and the contribution of the EQUAL “MEDIATION” project.

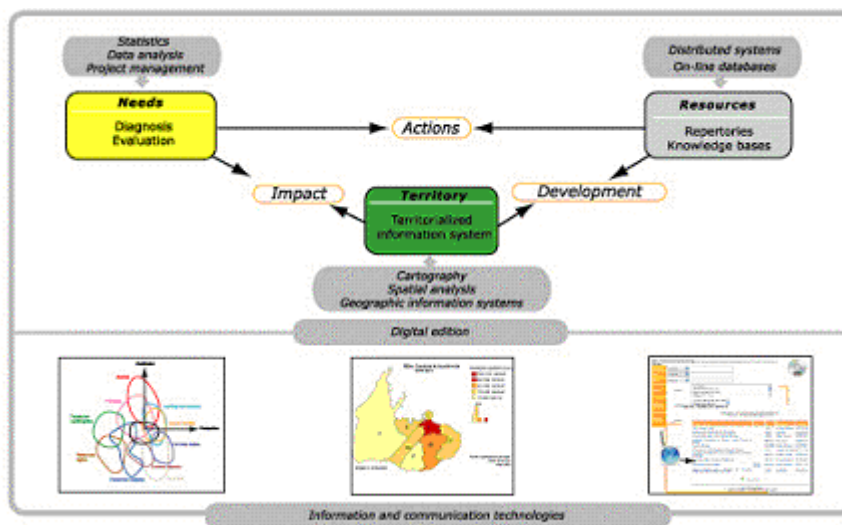
When it was possible, this harmonization was also made with the standards of the official European servers.

Diagram 6: Harmonization of the CATALYSE method.



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

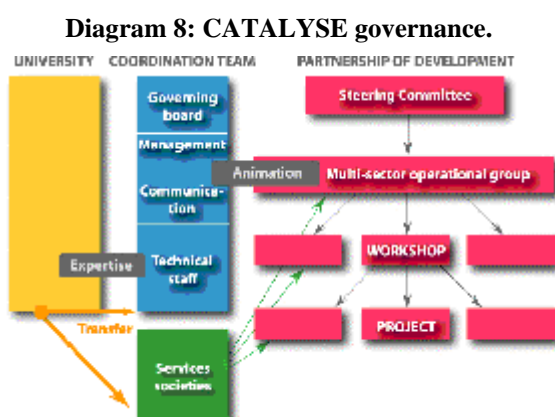
Diagram 7: the CATALYSE method.



An operational actors group draft a multi-sector guide for diagnosis and evaluation, at selecting relevant questions to identify individual needs. It coherently defines a services repertory to compare with the needs, and territorial indicators.

A technical and communication team processes and animates the data analysis. CATALYSE observatories use the free and friendly software PRAGMA, ANACONDA, NUAGE and SITRA for quantitative, qualitative and spatial data analysis to measure and compare the importance and localization of needs and services and their main profiles in the territorial community.

As tool of a development partnership CATALYSE present a specific governance.



An **operational group** gathers the actors of a development partnership. It defines all the useful data, supervises the analyses and interprets the results. 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. The operational group ranks the needs profiles. Ad hoc workshops deepen the needs analysis and evaluate services. They confront the needs that were underlined by the diagnosis with the services repertory to identify the deficiencies and non-adaptations of the offered services with respect to the needs. They also compare the needs territorial distribution to the services one. They confront the results to the territorial indicators to exploit the territory potentialities and to take into account its constraints. This observation step generates projects that are drafted within the **project groups**. Then, it allows regularly evaluating the led actions.

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

- European guide of diagnosis and evaluation (deliverables 51 and 56)
- Services repertory (deliverable 53)
- Selection of territorial indicators (deliverable 52)

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

- Pragma for quantitative analysis (deliverable 54)

- Anaconda and Nuage for qualitative analysis (deliverable 55)
- Territorial indicators system for spatial analysis (deliverable 56)

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

- Meanings of the questions of the guide
- Data processing protocols of the guide
- Comparative description of five CAENTI observatories
- Comparative description of their observation process.
- First draft of joint recommendations for use (Optima and Integra).

It started an experimentation of the new documents and tools within the network of migrants observatories coordinated by ACCEM.

Diagram 9: ACCEM Experimentation.



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

More than planned too, the concept of Territorial Intelligence Community System offers a global framework to integrate data analysis modules and territorial information in an editorial working flow, according to the actors' uses.

2. PROGRESS OF WP6 TOOLS

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

- The specifications of an online "Inclusion Itinerary Accompaniment File" (IIAF), the file (**Wp6f**).
- The specifications for the processing and editorial chain from territorial data to results (**Wp6s**).

It also enlarged its research activities towards:

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

2.1. Specifications for the file (IIAF, fWp6f)

In 2007, Wp6f pursued the content guide définition and started the file specifications design. The two research activities are linked because the group decided in the MADRID coordination meeting on April 2007 that the guide was the "Core" of the guide.

On the basis of the first guide version published in the deliverable 56, the group edited three operational versions in English, Spanish and French. The definitions and the protocols of the guide were debated in reference to the ACCEM experimentation with CAENTI actors and regularly updated comparing to the experiments of ACCEM SIRIA file, ADAPEI OSUA file, OPTIMA and INTEGRA harmonisation of files, COCAGNE work on quality service evaluation and VALDOCCO GEYSA file and Plan District V.

As a multidimensional tool for accompaniment the file has acquired an important extension in comparison with our initial project. We will discuss here the main specifications of the file, and its structure to manage the individual follow-up, on the one hand, and global diagnosis and evaluation with structured indicators, on the other hand.

The file is an important support for human services adapted to the new context of the territorial governance and powered by ICT. It is a traditional support in sanitary and social institutions, inclusion or insertion institutions, reception and migrants integration services, etc.. It has a new importance for actors in the fight against the complexity of the situations of poverty, exclusion, precarity and vulnerability, due to the socio-economic crisis running since the 70's. It interests the public administration, as associative or private local public actors, who both work more and more often in multi-sector territorial networks. It is also stimulated by new ICT possibilities.

Global specifications suggest three spaces in the file to adapt this traditional tool according to ICT: file, guide and "observation" form. Four types of considerations surround the file:

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

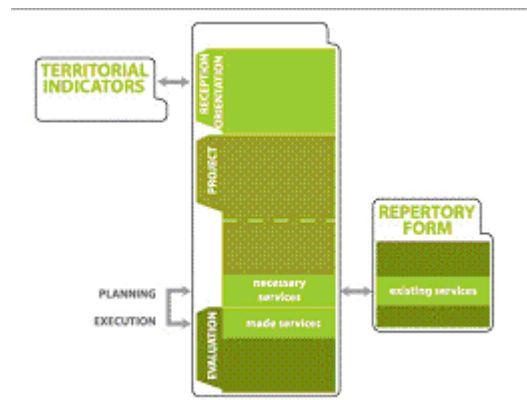
In the file, the guide is always useful. It gathers the individual multi-sector indicators needed for territorial observation. So, we distinguished permanent specifications inherited from the guide from its particular specifications linked to its digital form.

Due to ICT, the online file suggests more ambitious objectives than the guide, as for individual use as for global one. It is a *digital document* that is liberated from the constraints imposed by a paper support. Its *arborescent structure* will *optimize the time of gathering* in comparison with the linear structure of the guide. It also resolves the data repetition by *the management of iterations*. It feeds a *unique shared database* that allows *real-time control and processing*. It is a cooperative tool, which can be simultaneously fed by distant users. It allows a regular and collective user's *paths follow-up*.

As so as the guide, the file that is originally a tool for individual diagnosis and evaluation can be used for global diagnosis and evaluation. Files can be grouped for global diagnosis and evaluation at various nivels. As all the individual information can not be extracted for a global use, it is necessary to implement in the file a form at gathering useful individual indicators for the achievement of global diagnostics and evaluations. This form is braoader then the guide, which gathers a minimal set of multi sector indicators necessary for the diagnosis and evaluation at territorial level. It deepens beyond the guide indicators specific to a service, a theme or a public.

The file includes common specifications of the guide that are updated from the deliverable 56. The contents articulation of the guide were carefully checked according to its territorial interest.

Diagram 10: Guide contents articulation.



Within the guide, it is possible to compare:

- The necessary services to improve the person's situation;
- Later, with the services actually made, before asking the user' effective situation.
- The necessary services can be confronted to the repertory of available services.

- A selection of the guide individual indicators can be confronted to the territorial indicators, in collaboration with the WP4I group that deepened their availability at the local scale.

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

2.2. Progress on data processing tools (Wp6d)

The data-processing and technical specifications established in 2006 in deliverables 51 to 56 allowed quickly initiating the execution of the tools that were useful for the experimentation led with the ACCEM migrations observatories:

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

Diagram 11: Pragma classic, page of a question.

E		Ag	Class of age	
				0
				0
E 1	1	Ag15	Less than 15	
E 2	2	Ag17	From 15 to 17	
E 3	3	Ag24	From 18 to 24	
E 4	4	Ag34	From 25 to 34	
E 5	5	Ag44	From 35 to 44	
E 6	6	Ag54	From 45 to 54	
E 7	7	Ag64	From 55 to 64	
E 8	8	Ag74	From 65 to 74	
E 9	9	Ag75	75 and more	

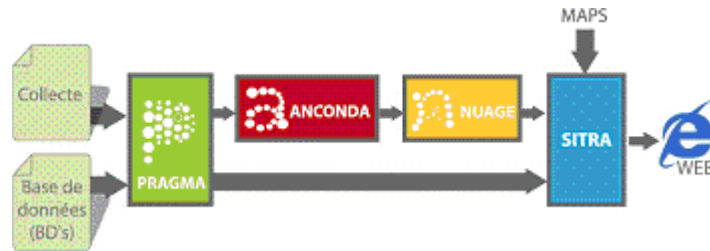
Wp6d also began to develop the specifications for more friendly, free, multi-platform and multi-language versions, for the CATALYSE Toolkit:

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

2.2.1. Integration of the Catalyse tools in the Catalyse Toolkit

The coordination of the execution of the **Catalyse Toolkit** following the intergration design showed in ALBAC conference (GIRARDOT, 2005)

Diagram 12: the CATALYSE tools.



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

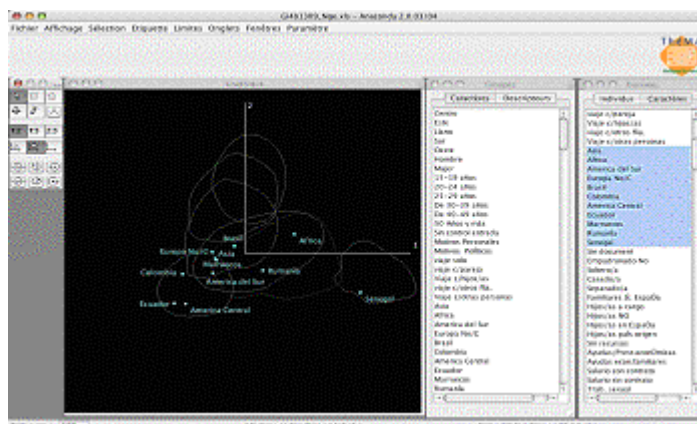
- The execution of a PRAGMA version limited to the key-in.
- The development of jPRAGMA a standalone, cross platform et multi-language version of PRAGMA in Java. It is presently developed in a “key-in” version and in a complete “treatment” version.

Diagram 13: jPRAGMA prototype.



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

Diagram 14: Integration of ANACONDA and NUAGE.



- Free mapping tools adaptation

As a consequence, the CATALYSE Toolkit will offer a complete chain of statistical and spatial analysis tools that will be accessible online with a CATALYSE blog.

2.2.2. Online integration in the prospects of the SCIT

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

2.4.2.1. Specifications of the SCIT

The specifications are those of the TICS, the informatics ones and the ICS ones.

TICS modelling

According to the scheme suggested in 2006, the research actions on TICS specifications now concern:

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

tools, the Database Management Systems (DMS) and problems about concurrent access to data.

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

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

ICS specification

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

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

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

The first step, so-called **sense production**, is thought according to the different required communications: internal communications in the team leading the project and in the operational group; external communications (public publication). We have to go beyond the mission of traditional observatories, which organize their intervention as an external expertise to the project. CATALYSE method completed by the TICS scheme modifies this approach to incorporate it in an informational process that makes a vital governance factor.

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

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

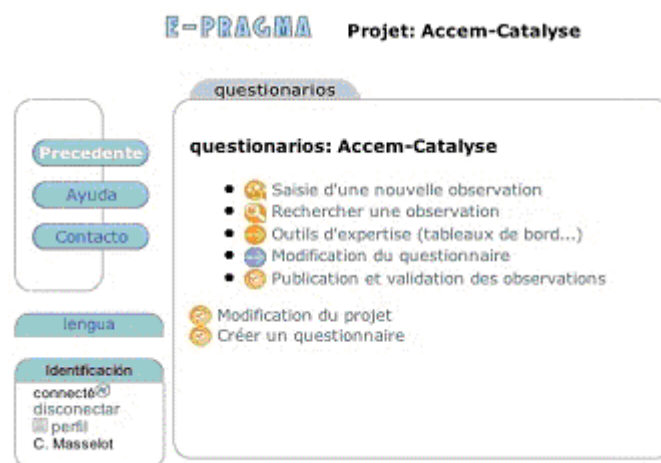
The last part of the communication cycle aims at rebuilding the sense of observed facts, data, created information and developed links, after the diffused results and so the consumed results. According to durability of observation this scheme does not have sense if it is thought according to a bad temporality,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

2.4.2.2. Online tools

The prototype online tools are epragma, mapping online solutions, and the CMS CATALYSE;

A first version of epragma, online PRAGMA, is developed in a «key-in» version.

Diagram 16: Screen of epragma (prototype).

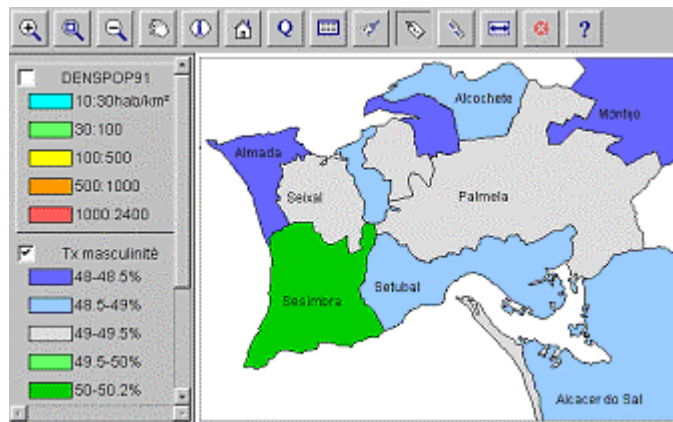


ePragma is useful:

- To create and manage partnerships (who lead many projects)
- To create and manage projects in a partnership
- To organize in a project several questionnaires for data gathering and quantitative treatment
- To digitalize the diagnosis and evaluation guide in a questionnaire
- To organize the collective work in a questionnaire (manage users)
- To organize the data key-in, by users, in a questionnaire (add, modify, delete)
- To manage the quantitative treatments (to calculate, to publish)
- To structure the data table in a standard format for the qualitative treatments in ANACONDA.

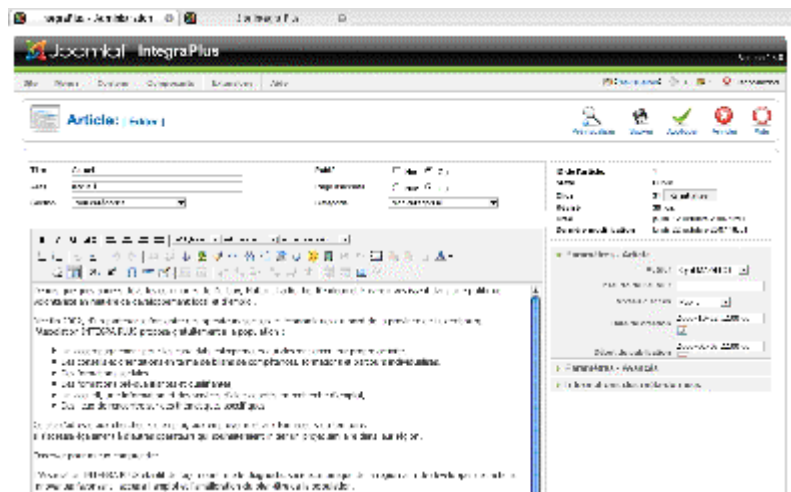
The Wp6p group also works to adapt free and friendly cartography software that manages territorial indicators.

Diagram 17: Territorial Indicators Cartography.



A Content Manager System CATALYSE is also in progress with INTEGRA plus. It is a website which contents can be directly managed. It integrates the services repertory and a document Base.

Diagram 18: CMS CATALYSE integrates the Services Repertory.



As a consequence, the CATALYSE Toolkit will offer a complete set of data and of spatial analysis tools. They can be integrated at a upper level in the TICS.

2.3. Catalyse toolkit specifications

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

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

- European Guide of Diagnosis and Evaluation- Definitions of the questions and modalities
- Protocols of data analysis
- Ket-in software PRAGMA
- Quantitative treatment software PRAGMA
- Qualitative analysis software ANACONDA
- Content management system CATALYSE
- Mapping software
- Handbooks of the PRAGMA, ANACONDA, repertory and map software (English,French, Spanish)
- Recommendations of uses

Three operational versions with page setting were established in English, Spanish and French were elaborated. They are progressively integrated in the different versions of PRAGMA.

The guide meanings and protocols are regularly updated. As the specifications of file, showed the utility of to conserve the guide as core of the file, we need to reorganize the contents of the guide.

A good articulation between the guide and the file is a general demand of the local actors, which are firstly afraid of the diversity of documents.

Partnerships are interested by the possibility of use the file that is perceived as a professional heavy document and the guide. Some observatories, which use the guide, think it is not possible that all the partners evolve together from the guide to the file. The standalone tools and the online tolls will be very linked in the CATALYSE CMS.

At end, the WP6 can be the good place to coordinate the TICS and the CATALYSE toolkit.

2.4. From guidansce notes (WP6g) to uses (Wp6u)

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

The study of the CATALYSE method implementation and use in the development partnerships allowed modelling the governance of the CATALYSE observatories, what allowed integrating then the uses in the TICS. Wp6g also describe the CATALYSE observatories and their observation devices. Now the ADAPEI experience is important as regards the online uses, theme on which COCAGNE will also work from now on.

The experimentation within the ACCEM observatories gives a new lighting on the uses. It is followed up by the Wp6f for the contents and by the Wp6d for the tools. It worked hard

on these two points during the first semester. After it needs more discussion that internal evaluation about uses.

At the end of the first period, OPTIMA and INTEGRA have began a joint draft of recommendation for the use of CATALYSE method and tools in development partnership. These recommendations were listed as a piece of the CATALYSE Toolkit in the MADRID coordination meeting, on April 2007. In HUELVA conference, on October 2007, the concerned actors asked for an evaluation of the use of CATALYSE Method before rewriting the recommendations they wanted to summarize for discussion.

Recently, OPTIMA evocated the possibility to make another experimentation in the rural commune of CHAPELLE-LEZ-HERLAIMONT in Belgium.

We also need to harmonize the approaches of territorial intelligence projects. During the coordination meeting of MADRID, we decided to complete the descriptions of the CAENTI development partnerships, as well as the descriptions of their observation device. The objective is not to fill in forms, but rather to establish an editorial canvas that allows making a homogeneous presentation.

We suggest unifying and widening this step because CAENTI worked out many approaches about territorial intelligence projects, in different but complementary ways: in the Wp4p (territorial intelligence project funded by EU), in the WP5, (research-actions) and in the Wp6g (CATALYSE observatories). More the descriptions of actors involved in the CAENTI and articles suggested for the focus of the territorial intelligence portal.

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

The suggest to create Wp6u coordination group in order to make a large survey on territorial intelligence projects in Europe starting from CAENTI and from CATALYSE projects.

A first task to perform will be to analyse and to evaluate the uses of CATALYSE method and tools within CAENTI observatories for the LIEGE coordination group, on February 2008. On this basis OPTIMA and INTEGRA Plus will redraft their recommendations for the use of CATALYSE. Wp6u will establish a grid to describe, analyse and evaluate territorial intelligence projects in order, then it will make the survey of projects.

2.5. The European Observatory of the Elementary school (Wp6e)

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

The Wp6e works examine the feasibility of the extension of such an observatory to several European countries in a network framework. The research problematic concerns the

identification of the main parameters that influence the school success and the pupils' orientation of the first and second grade, in perspective with the different types of life territories and the action of the different types of actors of the school life.

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

All these information feed a data basis that is made and exploited according to the CATALYSE methodology and with its tools.

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

During the second period, the Wp6e organized a conference and a cordination meeting in Salerno on May, the 11th and the 12th 2007

This conference firstly concerned a critical examination of the Observatory of Rural School experience :

- The Observatory interests and limits
- The contributions of the Catalyse tools

Then, the reflexion work concerned a European Observatory of School and the necessary information to develop.

Lastly, the organisational modalities were defined the actors: teams and responsables, the data basis, the users and the the information sources: students, families, staff, schools

An internatonal conference on education and territories (contexts, gouvernance and educational paths) is organized on 29 et 30 novembre 2007 in DIGNE (France) to compare the results of OER to other european studies.

Another French national meeting on educational governance and rural territories will take place in VESOUL, on December 11st et 12th 2007.

3. PROSPECTS OF WP6

Many projects and technical developments are initiated. They should lead to products by the end of the year.

In 2008, it should design a specialized portal on European Institutional Indicators that are useful for the end actors and to integrate them with analysis tools in the TICS.

The TICS modeling is made according to four axes. It allows jointly designing:

- the integration of the analysis functions of the territorial information: Wp6d in relation with the Wp4m and Wp4t)
- The modeling of the treatment protocol of territorial information (Wp6f and Wp6d),
- The specifications of the editorial and documentary chain (Wp6d et Wp4i)
- The modeling of the uses of the territorial community (Wp6u from Wp6d, Wp4p and WP5).

TICS modelling will be the convergence place of the CAENTI activities.

The new coordination group “Wp6u“suggests:

- Enlarging the study of the CAENTI projects (from Wp6g)
- Joining to this study the survey of the projects funded by EU and relevant in the territorial intelligence field (from Wp4p)
- Also joining the research actions experiences the Wp5 studied in the framework of the catalogues of experience.

This new coordination group will draw a panorama of the uses of territorial intelligence in the development partnerships and organize the seminary on this topic. The seminary will gather the CAENTI participants' actions and other projects funded by the EU in the territorial Intelligence field.

The Wp6u will draw a European map of the territorial intelligence actions. I will establish a specific description for the diagnosis actions, the maps, the observatories and the development partnerships, from the technical and the governance points of view.

In 2008, Wp6i will follow Wp6i and Wp6c.

Wp6s will take results from Wp6m and Wp6t.

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