

*Multidimensional Index of Territorial Heritage Activation:
a methodological reference for territorial strategic planning**

*Índice Multidimensional de Ativação do Território Patrimonial: uma
referência metodológica para o planejamento estratégico territorial*

*Índice Multidimensional de Activación del Patrimonio Territorial:
um referente para la planificación estratégica territorial*

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ABSTRACT

Starting from the understanding that an adequate methodological framework for analyzing the socioeconomic, cultural, and environmental reality, in an integrated and multidimensional way, recognizing the complexity of the territorial dynamics of development, is still a challenge that has not been effectively faced. It is in this perspective that a group of researchers from Brazilian and international universities became involved in an investigation that resulted in the proposal of the Multidimensional Index of Territorial Heritage Activation (IMAP), formed by partial indices of the six dimensions of territorial heritage (social, productive, cultural, human-intellectual, institutional and natural). Thus, it met the objective of proposing a methodological framework suited to the territorial analysis perspective, to contribute to the elaboration of territorial diagnoses favoring the prospection of innovative and sustainable development alternatives, having the territorial heritage as a reference. The approach is bibliographic, and argumentative in nature. An ontological, epistemological, theoretical, and methodological basis was built capable of sustaining the proposal of studies of the territory and elaboration of the IMAP. It is understood that the construction of this methodological framework is an important contribution to the advancement of studies about the strategic planning of municipalities, regions, or territories, considering the territorial perspective of analysis.

Keywords: Territorial Development. Territorial Heritage. Research Method. Multidimensional Index of Territorial Heritage Activation. Territorial Strategic Planning.

RESUMO

Parte-se do entendimento de que um referencial metodológico adequado à análise da realidade socioeconômica, cultural e ambiental, de forma integrada e multidimensional, reconhecendo a complexidade da dinâmica territorial do desenvolvimento, ainda é um desafio não enfrentado de forma efetiva. É nessa perspectiva que um grupo de pesquisadores de universidades brasileiras e internacionais se envolveu em uma investigação que resultou na proposição do Índice Multidimensional da Ativação do Patrimônio Territorial (IMAP), formado pelos índices parciais das seis dimensões do patrimônio territorial (social, produtiva, cultural, humano-intelectual, institucional e natural). Assim, atendeu ao objetivo de propor um referencial 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. Construiu-se uma base ontológica, epistemológica, teórica e metodológica capaz de sustentar a proposta de estudos do território e elaboração do IMAP. Entende-se que a construção deste referencial metodológico seja uma contribuição importante para o avanço dos estudos em relação ao planejamento estratégico de municípios, regiões ou territórios, considerando a perspectiva territorial de análise.

Palavras-chave: Desenvolvimento Territorial. Patrimônio Territorial. Método de Pesquisa. Índice Multidimensional da Ativação do Patrimônio Territorial. Planejamento Estratégico Territorial.

RESUMEN

Se parte del entendimiento de que contar con un marco metodológico adecuado para analizar la realidad socioeconómica, cultural y ambiental, de manera integrada y multidimensional, reconociendo la complejidad de las dinámicas territoriales de desarrollo, es aún un desafío que no ha sido efectivamente enfrentado. Es en esta perspectiva que un grupo de investigadores de universidades brasileñas e internacionales se involucraron en una investigación que resultó en la propuesta del Índice Multidimensional de Activación del Patrimonio Territorial (IMAP), formado por índices parciales de las seis dimensiones del patrimonio territorial (social, productivo, cultural, humano-intelectual, institucional y natural). Así, cumplió con el objetivo de proponer un marco metodológico adecuado a la perspectiva del análisis territorial, con el objetivo de contribuir a la elaboración de diagnósticos territoriales que favorezcan la prospección de alternativas de desarrollo innovadoras y sostenibles, teniendo como referencia el patrimonio territorial. El enfoque es de carácter bibliográfico, argumentativo. Se construyó una base ontológica, epistemológica, teórica y metodológica capaz de sustentar la propuesta de estudios del territorio y elaboración del IMAP. Se entiende que la construcción de este marco metodológico es un aporte importante para el avance de los estudios en relación con la planificación estratégica de municipios, regiones o territorios, considerando la perspectiva territorial de análisis.

Palabras clave: Desarrollo Territorial. Patrimonio Territorial. Método de investigación. Índice Multidimensional de Activación del Patrimonio Territorial. Planificación Estratégica Territorial.

INTRODUCTION

This text deals with a complex topic that aims to fill a gap in relation to territorial studies: the lack of a structured methodological framework that meets the demands of the territorial perspective of analysis. In other words, it starts from the understanding that a methodological framework suitable for the multidimensional analysis of different territorial areas, which can contribute to strategic planning and territorial development, is a challenge that has not been effectively faced. In addition, the hypothesis is supported that the territorial approach to development serves a central purpose, that is, to be an alternative for overcoming analyses of spatial areas, whether rural or urban, centered on disciplinary and/or sectoral procedures, if presenting it as an indispensable condition for carrying out studies that take into account the socioeconomic, cultural and environmental reality, in a multidimensionally integrated way, recognizing its complexity.

It is worth highlighting that it is appropriate to present the path of this methodological proposal, as from the observation to the initiative of taking on the challenge of creating a proposal for a multidimensional methodological framework, there is a long journey, which the reader deserves to know, in order to understand that, what is proposed does not result from an insight, a “sudden vision” of an “enlightened subject”, individually. 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 issue more evident, which, again, instigates and encourages other researchers to advance the debate on the topic. This is the constant process of learning, of producing scientific knowledge.

To a greater or lesser extent, a large set of publications, several of them 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 category¹. These two publications, in continuity, inspired the structuring of a research project entitled project Territorial Heritage as a reference for the development of territories and regions (*O patrimônio territorial como referência para o desenvolvimento de territórios e regiões - ProPAT*), presented in 2020 to the National Council for Scientific and Technological Development (CNPq) in a grant (Bolsa-PQ), which was approved and began implementation in February 2021². This

¹ Two reference publications by Italian authors on the topic: Dematteis and Magnaghi (2018); Tarsi (2019).

² Project related to the Research Productivity Program of the National Council for Scientific and Technological Development (CNPQ-Brazil). The investigation and studies were related to three other projects, carried out in parallel: (i) the project *The territorial heritage as a reference in the process of development of territories or regions: epistemic-theoretical assumptions and proposal of methodological instruments*, running in the PPGDTS-UFPR, involving professors from this university; (ii) the project *Territorial heritage as a reference*

project aimed to develop studies and propose and validate a methodological framework more appropriate to the territorial perspective of analysis, with the aim of contributing to the elaboration of territorial diagnoses that favor the prospecting of innovative and sustainable development alternatives, using territorial heritage as a reference.

Also part of the path that resulted in the methodological proposal presented here, since April 2020, the time of the pandemic, extending until mid-2021, a series of thematic seminars took place. The initiative came from the Ibero-American Network of Studies on Territorial Development and Governance (REDETEG), which later integrated partners, such as graduate programs at universities and other networks of researchers, similarly, the Brazilian Network for Research and Management in Development Territorial (RETE). In these seminars, several topics were addressed, all of them converging the focus on “territorial development and governance”, with speakers from universities in Brazil, Latin American countries, Portugal and Spain.

This profitable process of debates awoke the interest of several researchers 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. In parallel, other projects began to be prepared for their execution in other universities, contributing to the qualification of the research in question.

Once the ProPAT project team was formed and expanded, as its first task, it set out to demarcate 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 publications: (i) Dallabrida, Rotta, and Büttenbender (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 Territorial Heritage Thematic Dossier, in the Brazilian Journal of Regional Management and Development (v.18, n.1)³, comprising an introductory text and six articles that presented, as a whole, indications for the structuring of a multidimensional methodological framework, which could be used in the analysis and territorial prospecting.

From mid-2022 to May 2023, the ProPAT project research team, divided into six working groups, each studying one of the dimensions of territorial heritage (social, productive, cultural, human-intellectual, institutional, and natural), was responsible, through virtual meetings and thematic seminars, to identify the basic components of each dimension. Variables and techniques and/or data collection instruments were

in the development process of territories or regions: a study in three regions of Rio Grande do Sul, involving a network of institutions and researchers led by the PPGDR-UNIJUÍ and supported by FAPERGS; (iii) the project Epistemic-methodological foundations of territorial heritage, converging with the Social Dimension, being implemented at the PPGDPP-UFFS.

³ The presentation (DALLABRIDA, 2022) and the other articles in the Dossier are available at: <https://rbgdr.net/revista/index.php/rbgdr/issue/view/73>.

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 indicating variables to be considered in the study of the territorial reality, it was dared to perform the parameterization of the variables on scales ranging from an excellent situation to a very bad one, in terms of the activation of the territorial heritage. This parameterization allowed 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, which came to be called the "Multidimensional Index of Territorial Heritage Activation" (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 2020 to 2023, whose main results are summarized in this text.

Thus, in addition to the introductory considerations, the first section of the text mentions a wide range of publications considered a basis of inspiration for the territorial approach to development. Next, the meaning of the terminologies used is explained and a synthesis of the methodological framework is described.

Methodologically, it is a bibliographical approach, of an argumentative nature.

1 AN EPISTEMIC-THEORETICAL BASIS FOR THE TERRITORIAL APPROACH TO DEVELOPMENT

Initially, it is important to highlight the contribution of authors from the field of Geography, who already in the 1950s questioned the traditional debate on socioeconomic and geopolitical issues and their relationship with the development process, such as 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, played an important role in the discussion of territorial issues. Among Brazilian geographers, some authors stand out, such as Saquet (2022, 2020, 2019, 2018, 2015, 2013), Haesbaert (2021a, 2021b, 2019, 2013, 2011, 2007), Souza (2009) and Silveira (2022, 2003), with publications focused on the territory, when analyzing the socioeconomic-cultural reality, with geographic and/or interdisciplinary approaches.

Some authors of Economics have made relations between territory and economy, such as Ferrera de Lima (2022, 2012), Brandão (2007), Campolina Diniz and Lemos (2005), and Boisier (2000, 1998), just to name a few in the Latin-American scenario, with more focus on development studies. In the areas of Economics, Geography, and Social and Human Sciences in general, contemplating multidisciplinary

approaches, mostly converging with the territorial approach, the list is extensive, which requires prioritizing some: Perafán et al. (2022, 2018); Favareto (2020, 2010); Denardin and Sulzbach (2019); 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); Schneider and Turtle (2004); Fernandez (2003); Veiga (2002); Sabourin (2002); Courlet (2002); Lopes (2001); Veltz (1995); Scott and Storper (1986). More recently, Brazilian researchers integrated into Master's and Doctoral programs have reflected on regional development as a "field of knowledge": Etges (2005); Favareto (2023, 2022); Theis (2022; 2019), Theis et al. (2022).

Other publications contributed directly or indirectly to the debate on the territorial perspective of development, some of them highlighting issues related to the socioeconomic-institutional environment (SEN, 2000; PUTNAM, 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). Another distinguished note can be given to an author from Rio Grande do Sul (DE SOUZA, 2009), with more didactic publications⁴.

In the specific case of the ProPAT project, many of the publications mentioned in this section of the text served as inspiration for publications by members of the research team. For example, Dallabrida (2020a) highlights four theoretical categories that served as a theoretical basis for the aforementioned investigation: territory, territorial governance, territorial heritage, and territorial development. These categories, forming a theoretical structure, for your better understanding, can be ordered as follows:

- a) **A starting category**, the *territory*, as a historically and territorially located socio-territorial **structure**, whose parts are interrelated;
- b) **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, based on the understanding that the form historically assumed by a structure results from horizontal societal conversations;
- c) **A resulting category**, *territorial heritage*, as the **form** assumed by the socio-territorial structure, formatting the spatial arrangement with its different dimensions;

⁴ As they are generally known, approaches on "classical location theories" and "theories on regional dynamics" (Growth Poles, Cumulative Circular Causation, Interregional Transmission of Growth, Export Base Theory) are not mentioned in this text, 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).

- d) **A category of functionality**, *territorial development* (or local/regional), as a **function** of form, based on the understanding that the confrontation between different future projects results in spatial configurations demarcated administratively (municipalities, regions, countries) or by relations of identity, anchoring and belonging to a place (territories), being part of the territorially desired utopia and its momentary concreteness as a possible reality (DALLABRIDA, 2020a)⁵.

In other words, the analysis categories of Santos' geographic method (1997) were taken as guidance, and a relationship was made with the territorial dynamics of development.

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). 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" (SAQUET, 2015, p.25). Therefore, it does not result from processes induced from outside, from enterprises that are established in 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 territory and the premises of territorial development converge in the construction of a conception of development that is dialogical, ecological, cultural, and participatory, seeking to value decision-making autonomy, anchoring and territorial ties, in addition to preserving nature, identity, and popular knowledge (SAQUET, 2018).

As for the process of territorial development, the studies that resulted in this text started from the understanding that its dynamization results from actions and/or strategies of "activation of territorial heritage" (DALLABRIDA, 2023b), based on a series of objectives and guidelines, which should have their origin in the "agreement between the social actors, the economic-productive sectors and the local public administration" (MERINO DEL RIO, 2022).

In studies in which a multidimensional index, the IMAP, is proposed, the objective was to build a methodological framework that could be used in different territorial cutouts. Therefore, it was decided to consider as a parameter a set of principles originating from an epistemic-theoretical basis convergent with the territorial approach to development. In other words, in the ProPAT project, on this basis, a series of fundamental principles were selected to guide the analytical perspective, also having implications for the methodological orientation, considered macro referents, or parameters, in structuring the intended "multidimensional methodological matrix" (DALLABRIDA, 2023b).

⁵ The literature on territorial governance will not be mentioned in this text, for the same reasons used in the previous note. Two publications are suggested: Pires (2022) and Dallabrida (2015).

Therefore, even considering the proposition of Merino Del Rio (2022), in the ProPAT project, of the statement of principles indicated by the assumed epistemic-theoretical basis as fundamental, some of them were prioritized, with the purpose of serving as macro referents, or parameters, in dimensioning 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 was suggested:

- a) **Environmental sustainability:** prioritization of alternatives that can have uninterrupted replicability, with respect to life in all its forms of manifestation;
- b) **Inclusion and Equanimity:** prioritize alternatives that serve a greater number of beneficiaries, from the perspective of personal and spatial equanimity;
- c) **Innovation:** prioritizing alternatives for solving challenges that meet the perspective of innovation and creativity;
- d) **Totality:** prioritize respect for territorial specificities, however, analyze solutions and alternatives that consider reality in a contextualized way (regionally, nationally, globally);
- e) **Multidimensionality and Integration:** prioritize solutions and alternatives that meet the perspective of multidimensionality, considering their possible articulations and connections;
- f) **Autonomy:** prioritize solutions and alternatives that favor autonomy and territorial power, allowing the expression of their specificities (DALLABRIDA, 2023b).

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 evident, placing it in a given paradigmatic perspective. Therefore, support was sought in four epistemic fields, based on the understanding that a new methodological framework that converges with the territorial perspective of analysis must be supported in epistemic fields, namely:

- a) the new systems theory (CAPRA, 1996);
- b) complexity theory (MORIN, 1996); historical-dialectical materialism (PIRES, 1997); and the epistemological perspective based on decoloniality (MIGLIEVICH-RIBEIRO, 2014) and decentering (SANTOS, 2014). Epistemic fields that point to the equitable redistribution of social resources and the attribution of goods and services to all citizens⁶.

⁶ The explanation of the epistemic-theoretical basis, the methodological references used in the ProPAT project, as well as indicators to guide processes of articulation or territorial governance, can be accessed in three publications: Dallabrida, Büttenbender and Rota (2021); Dallabrida et al. (2021) and Dallabrida et al. (2022).

These brief reflections, in summary, suggest that thinking about development, taking territorial heritage as a reference, implies that any prospectations that are carried out contemplate, equitably and equitably, all dimensions of reality and all segments of society, considering factors such as technological evolution and environmental sustainability. This all implies that thinking about development from a territorial perspective represents an attempt to overcome the developmental fallacy, prioritizing meeting the plural desires and interests that exist in territories (DALLABRIDA; ROTTA; BÜTTENBENDER, 2021).

2 AN ALLUSION TO SOME TERMINOLOGIES USED IN THE PROPOSED METHODOLOGICAL FRAMEWORK

When referring to IMAP, for a better understanding, it is necessary to clarify the meaning of the terms used. The mention of the term “methodological framework” refers to a set of components, variables, techniques, and/or data collection and analysis instruments, that 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 demonstrate the activation rate of each of the dimensions of territorial heritage. The use of the term “multidimensional” refers to the fact that, from the calculation of the index in each dimension, its sum will compose an index that summarizes all the dimensions of the territorial heritage, of the spatial area under analysis.

In order to talk about the “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: “[...] a set of assets and resources, material and immaterial, that have accumulated throughout history in a given territory” (DALLABRIDA, 2020b, p.12). Activation refers to the act of activating, whose meaning is given here: to accelerate, sharpen, amplify, hasten, enliven, awaken, stimulate, foment, strengthen, boost, intensify, promote, invigorate.

However, to understand the process of activation of territorial heritage, as a starting point, the meaning of resources and assets proposed by Benko and Pecqueur (2001, p.41) is used. “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”. Thus, territories, at each moment in history, are formatted in spatial arrangements that can be identified through a set of resources and territorial assets. In this way, 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 reveal, to explore, or still to be organized), others, which are presented in the form of assets (the factors in ‘activity’). Exploring, here has the meaning of arranging, cultivating, 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, achieving the “activation of territorial heritage” means revealing the potentialities, putting them into action, in use, with the perspective of starting to contribute more significantly to territorial development, both in the socio-productive sense and in the contribution to improving the quality of life of people living in the territory and maintaining biodiversity. 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 refers to a quantitative or qualitative order 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”, mention is made of 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. Therefore, the Multidimensional Index of Territorial Heritage Activation (IMAP) reveals the situation at the moment regarding the way of using the potential of a territory for territorial development, through the activation of each of the dimensions of the territorial area under analysis. At an ideal extreme, one would have all the factors activated, and the potential fully and properly utilized. In the other, a situation of absolute lack and precariousness, therefore, of non-activation. Thus, 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 a territory for territorial development, the implicit understanding is that all precautions are being taken into account so that the principles of sustainability are covered, in all their forms of expression.

3 FROM THE METHOD TO THE STRUCTURE OF THE MULTIDIMENSIONAL METHODOLOGICAL FRAMEWORK

3.1 THE APPROACH METHOD ADOPTED

The researchers involved in this study come from different disciplinary fields, such as the areas of Human, Social, and Applied Social Sciences. In these areas, research coexists based on the most diverse approach methods: 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 carry 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, 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.

What was sought in the investigation that resulted in this extract was not a monist/unitary view, in which all research results would be subordinated to a single logic, meeting a recommendation: “[...] We should work with a simultaneous plurality of different organizational principles of society” (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 benchmarks that allow and enable this triangulation and the interfertilization of knowledge. 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, but actually, seeking the “interfertilization 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.

3.2 METHODOLOGICAL PATH AND CONSTITUENT ELEMENTS OF IMAP

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

- a) **ontological**, defining the core of the dimension, the scope and basic concepts;
- b) **constitutive**, by delineating the components of the dimension;
- c) **indicative**, through the definition of the variables of each component, identification of referents that allow the proposition of a scale for each component.

Regarding the indicative aspects, they will follow a reference framework, containing the following elements:

- a) **components** - aspects to be taken as a reference for defining the variables – e.g. in the social dimension, the labor relations;
- b) **variables** - aspect or characteristic defined for analysis and measurement – e.g. in the social dimension, the percentage of formal and informal work;
- c) **data collection techniques and/or instruments**: data search sources - e.g. in the social dimension, the General Register of the Employed and Unemployed (CAGED).

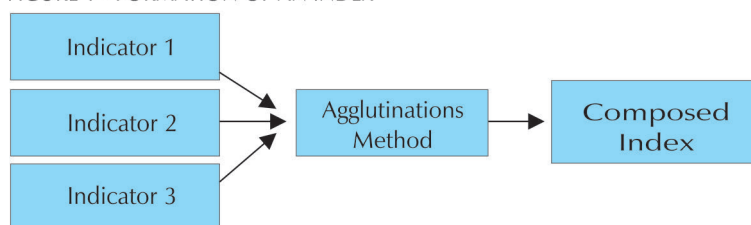
The methodological proposal of putting forward an index to analyze the activation of the heritage of a territory, the IMAP, goes through stages systematized below. To support the method, it is proposed to create a measurement scale, based on indicators referring to a certain aspect of reality, in each dimension, following indications by Januzzi (2001), who proposes the following steps:

- a) elaboration of a reference framework, based on previously referenced concepts and theories, highlighting the components, their respective variables and techniques and/or data collection instruments, for each of the dimensions;
- b) proposition of a 5-point scale for each of the variables, of the respective components of each dimension;
- c) generation of indicators for each variable that, aggregated, result in an index that reveals the level of activation of the territorial heritage of each of the dimensions;
- d) finally, the weighted sum of the dimensional indices 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.

Januzzi (2001) corroborates this understanding by presenting figure 1.

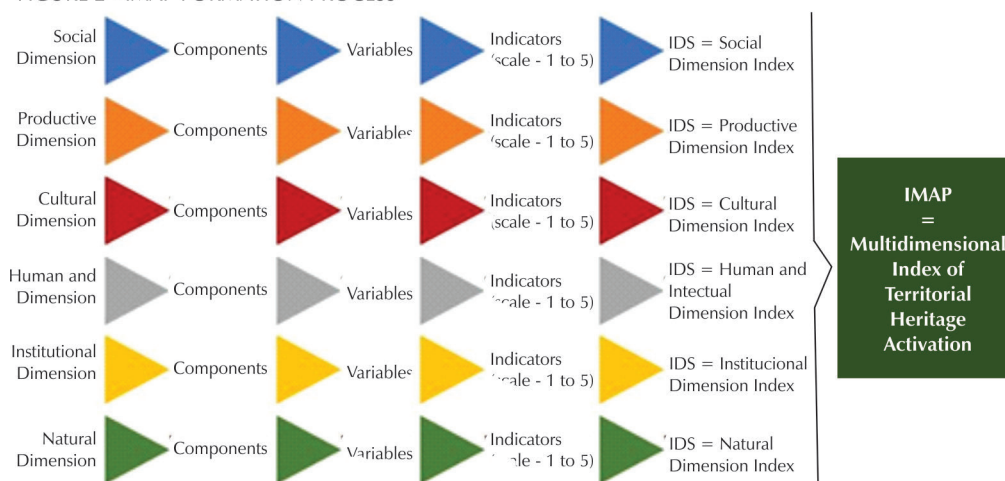
FIGURE 1 - FORMATION OF AN INDEX



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 2. For each of the variables, a five-fold scale will be created, from a situation of full activation to one of total precariousness.

FIGURE 2 - IMAP FORMATION PROCESS



SOURCE: Organized by authors (2023)

The aggregation of the indexes of each dimension results in the Multidimensional Index of Territorial Heritage Activation-IMAP, as shown in figure 3.

FIGURE 3 - AGGREGATION OF THE PARTIAL INDEXES OF THE DIMENSIONS FOR THE FORMATION OF THE IMAP

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

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)

The adopted scale is resumed, from 1 to 5, in which 1 always refers to the worst situation regarding the activation of each dimension of the territorial heritage and 5 refers to the ideal situation, therefore, optimal for the activation of each dimension of the territorial heritage. The aggregation of dimension indices 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 dynamics.

In addition to presenting a synthetic diagnosis with IMAP, the partial indices express the peculiarities of each dimension of the territory, which is fundamental to guide public policies, programs, and actions in the territory that aim to activate the most fragile dimensions, as well as maintenance actions of the most activated dimensions in the territory. In the aforementioned methodological path, it is highlighted that each territory presents specific dynamics and it is necessary to articulate this recognition with the carrying out of particular diagnoses, based on consistent theoretical concepts and premises. The complexity of the territory demands a systemic view of the dimensions that make it up, with the challenge of understanding their interrelations, as proposed in IMAP.

FINAL CONSIDERATIONS

In June 2023, the stage of elaboration of the proposed multidimensional methodological framework, IMAP, as summarized in this text, was completed. The next steps will include: (i) socialization for the debate of ontological-epistemic-theoretical assumptions and the proposed methodological framework, both converging with the territorial approach to development; (ii) its pilot application in different

territorial cutouts, in order to proceed with its validation; (iii) making the necessary adjustments, which should take place over the next two years (2024-2025); (iv) finally, the publication of the second edition, revised and expanded, of the book published in 2023 (DALLABRIDA et al., 2023).

IMAP's methodological proposal is the result of a long journey by a group of more than thirty researchers, undertaken since 2021. Even considering the possible gaps that may still be evident in its pilot application, it aims to provide innovative contributions to advance territorial studies. When referring to the strategy of moving forward, emphasis is placed on the need to consider the socio-economic-environmental and cultural complexity of different territorial arrangements, which necessarily requires, in territorial strategic planning initiatives, a multidimensional stance for its analysis. Therefore, this is a task to be undertaken through interdisciplinary views, involving professionals from different areas of knowledge. In other words, this is not any form of disregard for disciplinary and dimensional contributions in territorial studies. What is required is the interrelationship of knowledge from each of the areas of knowledge, in order to provide opportunities for understanding territorial complexity, thus enabling professionals in "territorial action" (DALLABRIDA; MENEZES; FUINI, 2023; DALLABRIDA et al., 2022).

This is the great challenge to be taken on by Brazilian and global academia! Let's move forward, as the group that was involved in the studies that resulted in this text believes it is possible, so much so that they dared to propose an indicative "path".

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