

# TERRITORIAL APPROACH OF DEVELOPMENT: CONCEPTUAL CATEGORIES AND METHODOLOGICAL ASSUMPTIONS<sup>1</sup>

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### **Abstract**

This text, in the form of a theoretical essay, summarizes the main epistemic-theoretical-methodological conceptions that converge with the territorial approach of development, using publications dealing with territorial studies to refer to the approach and procedural methods. The indications contained in the consulted literature that was based, in particular, in four epistemic fields, were highlighted, namely: the new systems theory, the theory of complexity, the historical-dialectical materialism, and the perspective of decoloniality and decentralization. As a result, from the epistemic-theoretical-methodological concepts contained in the publications, it could be concluded that: (i) the indication that the territorial approach is sustained in the conceptual category territory, following the meaning proclaimed by several authors, such as, Raffestin, Brunet, Ferras and Théry, Saquet and Pecqueur; (ii) the territorial approach needs to assume the conceptual category of territorial development, as a new multidisciplinary scientific paradigm that would allow encompassing the plurality of prospection interests present in the territory, fully understanding its multiple dimensions; (iii) that, as a result, there is an urgent need to advance in the adoption of methodological approaches and procedures that necessarily converge with the territorial approach of development. It is understood that the text brings some important contributions, however, not exhausting the theme, leaving room for new interpretations.

**Keywords:** Territory. Territorial Approach. Territorial Development. Methodological Assumptions.

## 1 Introduction

Studies and research on territory and the territorial approach have been advancing and expanding its contributions to different sciences. In this sense, in one of the publications on this topic, Dallabrida, Rotta, and Büttenbender (2021) proposed to identify epistemic-theoretical assumptions that guide the development of methodological procedures that can be used in the recognition and analysis of socioeconomic-cultural and environmental contexts, intending to prospect innovative and sustainable alternatives for territorial development. The authors support their reference in four epistemic fields, namely, the new systems theory, the theory of complexity, historical-dialectical materialism, and the perspective of decoloniality and decentralization. From the aforementioned epistemic fields, the publication points out a series of indications that intend to serve as an epistemic-theoretical reference for territorial studies, which can be summarized in four points.

First, the so-called “new systems theory” implies the concept of a system as a set of components and variables organized, interdependent and integrated. Thus, it can be taken as an indication that, according to the systemic perspective, when considering the territory as a system, it is necessary to consider the principles of integration, interdependence, and multidimensionality in its study and analysis, in addition to that not everything is feasible to be controlled from the territory, except for its assets or resources, represented by the territorial heritage (DALLABRIDA)<sup>1</sup>.

Second, that the “perspective of complexity” considers the objective of knowledge not to provide an absolute and complete answer in itself, but to open dialogue and not to enclose it, resulting in an understanding of reality from its various interrelated dimensions, in an attempt to overcome disciplinary or sectoral approaches. Thus, it is possible to associate the concept of complexity with the territorial context, highlighting some principles, such as anti-reductionism, pluralism, multidimensionality, incompleteness, and uncertainty (DALLABRIDA; ROTTA; BÜTTENBENDER, 2021).

Third, that the “historical-dialectical materialist” thought can be understood as an epistemological path that bases the knowledge for the interpretation of the historical and social reality in the effort to capture, in detail, the articulations of the problems, analyze the evolutions, and trace the connections about the phenomena that involve them, highlighting the importance of the principle of contradiction, wholeness, and historicity in the process of understanding and analyzing complex realities, as is the case of socioeconomic, cultural and

1 On the topic of territorial heritage, see recent publication: Dallabrida (2020a).

environmental contexts represented by the territories. In summary, the dialectic facilitates the understanding of reality from its interrelated dimensions (DALLABRIDA; ROTTA; BÜTTENBENDER, 2021).

Fourth, that the “decoloniality or post-colonialism” perspective proposes the “deconstruction of essentialisms” calling into question ethnocentric universalism, theoretical Eurocentrism, methodological nationalism, epistemological positivism, and scientific neoliberalism, contained in the mainstream of the sciences, implying that decolonizing theory is one of the steps towards decolonizing power itself. In the same line of thought, the “decentralization” perspective proposes planning, management, and spatial planning, as a “civic-territorial model” proposing the conversion of abstract citizenship into concrete citizenship, in particular, overcoming practices in which development plans or strategies are devised for regions or territories, only taking as reference the most dynamic sectors of the economy, forgetting the peripheral manufacturing, distribution and consumption circuits (DALLABRIDA; ROTTA; BÜTTENBENDER, 2021).

Therefore, the epistemic-theoretical assumptions mentioned impose the indication that territorial interventions, especially initiatives aimed at territorial planning and management<sup>2</sup>, need to admit and comply with a series of principles, such as those referred to in the four epistemic fields.

The principal purpose of this text is to indicate methodological assumptions that converge with the territorial approach. To give effect to this purpose, the indicative made in Dallabrida, Rotta, and Büttendebender<sup>3</sup> was not ignored: the methodological approach and procedures emanate from a certain epistemic-theoretical conception. In other words, a certain epistemic-theoretical conception guides our practices of studying reality, indicating the most appropriate methodological procedures for this. Thus, following this orientation as a guideline, we sought to systematize the main epistemic-theoretical concepts converging with the territorial approach that can serve as a basis for methodological assumptions that have this same convergence.

Methodologically, this text is characterized as a theoretical essay, based on a set of publications, and the criterion for selection of the literature, in part, differs in the two sections in which the article is structured. As a common criterion to the two sections, priority

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<sup>2</sup> On the topic, see a recent publication, which presents theoretical and methodological contributions to the planning and management process of municipalities, regions or territories: Dallabrida (2020b).

<sup>3</sup> The aforementioned publication is the one that motivated the deepening of the theme, resulting in this new text, resuming theoretical categories and focusing on the methodological dimension. Therefore, both texts complement each other.

was given to reflections contained in the literature that had a convergence with the four epistemic fields already mentioned. As differential criteria, in the first section - epistemic-theoretical orientations -, priority was given to publications from Geography, Economics, Sociology, Humanities, Policies, and Environmental Sciences, with a focus on reflections that converge with the territorial approach of development. In the second section - methods and their convergence with the territorial approach -, publications from the epistemic-methodological area were consulted that could provide indications for the structuring of a methodological framework that would allow the performance of socioeconomic-cultural and environmental diagnoses, to prospect for development alternatives converging with the territorial approach.

Therefore, after these introductory considerations, it begins by appealing the theoretical-methodological approaches prioritized in territorial studies, highlighting three focuses: the notion of territory, the territorial approach, and the meaning of development, in addition to theoretical-methodological issues. The text follows, referring to the techniques of approach and procedure, always taking as a parameter its convergence with the territorial method and with the epistemic-theoretical bases already mentioned, ending with some conclusive reflections.

## **2 Epistemic-theoretical guidelines convergent with the territorial approach of development**

This section seeks to register the main focus of the approach, both in the theoretical and methodological dimensions, supported by reflections presented by authors focused on territorial studies. It begins with a quick turn to approaches that highlight the relationship between the territory notion and the territorial approach, and this, with an indicative development concept, ending with the literature that refers to methodological issues.

### **2.1 Focus on territory and territorial approach**

In Geography, when using the conceptual category territory where the territorial approach notion is supported, reference is made to a complex and integrated reality, with its different dimensions (social, environmental, economic, political, cultural). Thus, the rural or urban space are parts of an interrelated whole, where portions cannot explain the whole that is only understood by analyzing the interrelation of the parts with each other and with the whole.

Some authors have already called our attention to the inadequacy of the territory category usage, which demands reaffirming its meaning from the foundations of Geographic Science. Therefore, the decided option was to prefer the territory purpose expressed by some authors, like Raffestin (1993), referring to a portion of appropriate, delimited space, which results from a collective production involving power relations.

Even if it is not excluded at all, the territory is not reduced to a legal entity, nor is it reduced to the idea of being rooted in a place. Something more is needed: the feelings of belonging (I am from here) and of appropriation (this is mine, it is my land, my domain) (BRUNET; FERRAS; THÉRY, 1993). Therefore, the territory is not just the neutral geographical receptacle where companies, collectivities, and individuals act, assuming the role of an actor in the socioeconomic-cultural processes (BEDUSCHI; ABRAMOVAY, 2003).

Fuini (2014a), summarizing reference authors, makes a synthesis about the notion of territory, emphasizing the idea of an outline of the geographic space defined by and from power, control, appropriation and use relations, and these relations are defined in terms of political and political-institutional, economic, and socioeconomic, cultural and symbolic-immaterial terms. Saquet (2015) complements, highlighting the meaning of territory as a social, historical, and relational construction<sup>4</sup>.

This social construction of the territory will always result from the meeting and mobilization of the social actors that integrate a given geographical space and that seek to identify and solve common problems. This gives rise to the notion of “given-territory” and “built-territory” (PECQUEUR, 2005). The first results from a political-administrative delimitation, which corresponds to a region, a municipality with its subdivision into districts and localities, as a portion of the space that is the object of observation. The constructed territory, in turn, is socially instituted by the actors, resulting from a process of improvements, the result of the game of the social actors and established a posteriori. A given territory is in line with what Haesbaert (2019) presents as the “normative category” of the territory, whereas the built territory approaches the perspective of the territory as a “category of practice”. A given territory can house several built-territories, just as a built-territory can encompass more than one granted territory, as a whole, or just parts of them.

Therefore, the territory is a field of power dispute. In this sense, following an “Arendtian” perspective, Duarte (2009) reaffirms that such power corresponds to the human ability not only to act but to act merging forces. In this way, territorial command comprises collective action, cohesive in the debate, which preserves human plurality in its wide range

<sup>4</sup> Other Brazilian publications summarize the different approaches to territory and territoriality: Saquet (2007; 2011); Fuini (2017; 2014a).

of interests, opinions, and points of view, even if conflicting. Collective action in the territory in search of convergences between different interests corresponds to what is proposed in the notion of territorial governance (DALLABRIDA, 2015).

Saquet (2018), taking dozens of authors as a reference, points out fundamental epistemological and ontological characteristics concerning the meaning of territory: (i) it is appropriate, dominated, and has a political and economic content involving points, networks, and meshes; (ii) it is produced at different scalar levels with a relational meaning, substantiating a complex trans and multiscale territorial plot; (iii) it is produced through territorialities in a historical process centered on power relations, networks, and cultural identities. "Therefore, there is complexity and heterogeneity in/from territories, internally and between them, substantiated from nature-society relations" (p. 483).

Finally, two authors point out that the discussion about territory and territorial approach needs to be done from the perspective of the reticular paradigm. For Haesbaert (2007), the territory, in its postmodern sense, would be the network territory, with a double perspective of movement, in and over space, which is manifested by de-territorialization and by multi territoriality. Thus, according to the author, contrary to the alleged end of territories, we have, in contemporary times, the phenomenon of multi territoriality. Saquet (2018) goes in the same direction, stating that the territorial analysis centered on the concept of territory needs to consider its constitution in the form of networks (short, intermediate and long, virtual, ephemeral and lasting), potentiating the cooperation and solidarity of the network anchored locally and in ecological and cultural processes. Thus, according to the author, in the territory and the networks, territorialities are always present and signify conflicts, contradictions, class struggle (power relations: otherness and exteriority), and territorial disputes, therefore, more convergent to the conflict than with consensual agreements.

The reflections provided by the mentioned authors express the meaning and understanding of territory that is understood as fundamental when assuming the challenge of thinking about development from the territorial approach. The understanding of territory, referred to here, has theoretical and methodological implications for territorial studies.

## 2.2 The territorial approach and an indicative of the meaning of development

The prioritization of the territory category and the focus on the territorial approach has implications of an epistemic-theoretical-methodological nature. One of them is the definition of the development category (local, regional or territorial?). It is proposed that the

category “territorial development”<sup>5</sup> should be prioritized.

Why use the territorial development category and not another? Is it just a new fad? It begins by answering that this is not a new fad, it is an advance in the understanding of development, starting with recognizing the importance of the territory, but there are other arguments. Some of them stand out here.

It begins with an unsuspecting position proclaimed by Furtado (2004) when it reaffirms the understanding that development is not just “[...] a process of accumulation and increase in macroeconomic productivity, but mainly the way of access to forms better able to stimulate human creativity and respond to the aspirations of the community” (p. 485). For the author, historically, in Brazil, there was no correspondence between growth and development. Economic growth “[...] as we know it, has been based on the preservation of the privileges of the elites who satisfy their desire for modernization; development, on the other hand, is characterized by its underlying social project” (FURTADO, 2004, p. 483). Finally, the author states that it is only when the social project prioritizes the improvement of the living conditions of its population that growth is metamorphosed in development. This perspective pointed out by Furtado must be the main guideline in the territorial approach of development.

According to Schneider et al. (2010), the debate on territorial approach to development emerged in Brazil in the 1990s, driven by a context of organizational and political recovery of social movements and other instances of civil society. For the authors, this approach emerges as a way to promote the breakthrough from the sectoral focus of economic activities, to mitigate the spatial dichotomy between rural and urban, countryside versus city, in addition to recognizing the role of emerging actors in civil society.

In this sense, the territorial approach to development proposes to value the diversity of actions, strategies and trajectories of players in the quest for the bottom up form in the vector of movements. The territory is seen and understood as a space and a field in which these processes take place and are affirmed, thus becoming an important unit for the planning and implementation of development actions (SCHNEIDER et al., 2010, p. 28).

Denardin (2016) draws attention to the two pillars of territorial development. On the one hand, there are territorial resources, both tangible and intangible, which are factors to

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<sup>5</sup> The conceptual discussion on development and territorial governance will not be resumed in this text, as it has already occurred in other publications, such as: Dallabrida (2020c; 2015); Dallabrida, Rotta and Buttenbender (2021).



be explored, organized, revealed, which can be generic or specific. On the other hand, there are the actors (private, public, and associative) and their different modes of coordination that aim to solve production problems inherent in the territory.

Saquet (2018), however, referring to the premises of territorial development, proposes to maintain the focus of territorial studies to contribute to the construction of a conception focused on cooperation and dialogical, ecological, cultural, and participatory territorial development. The purpose of this theoretical perspective proposed by the author is to value decision-making autonomy, the preservation and conservation of nature, identity, popular knowledge, reciprocity, anchoring, and territorial ties, in a movement contrary to the expanded reproduction of capital. In this perspective, according to the author, the ways to be prioritized to improve the quality of life of the simplest and most humble population is the popular organization, working together, researchers and residents, amid the diversity of subjects<sup>6</sup>.

Thus, according to Saquet (2018), the territorial perspective of development represents the construction of the counter-hegemonic paradigm. This construction must be, necessarily, participative, dialogical, and reflective, involving and valuing the differences, inequalities, and identities of each place and territory, without disconnecting from the world, however, highlighting the close relations, solidarity, culture popular, anchorage, handicrafts, agroecological practices, edaphoclimatic conditions specific to each ecosystem, among other aspects present in the territory.

Regarding the option of using the territorial development category, Veiga (2006) reinforces the defense that his notion presents itself as a way of overcoming sectorial practices for the territorialized practices incorporation, discussions about the dichotomy established between urban and rural areas lose their sense. These two elements come to be characterized as inseparable in any strategy aimed at developing the territory. And more: the city and the countryside are different from each other and have different roles, and they are in dialectic uniqueness and complementarity (SPOSITO, 2006). To advance the debate, Denardin and Sulzbach (2019) point out that the interdependence relationships between rural and urban spaces allows for a better understanding of their bonds and dependence between both.

Lévesque (2010) synthesizes the lines of argument, in particular, by three recognized authors, Bernard Pecqueur, Bruno Jean, and Ricardo Abramovay, looking for the main

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<sup>6</sup> Based on these reflections, Saquet (2018) makes reference to cooperation and territorial development projects carried out in the municipality of Francisco Beltrão (Paraná-Brazil), with agroecological farmers.

convergences. The author begins by stating that territorial development represents, at the same time, a new academic discourse that surpasses traditional approaches to local and regional development and new social discourse, designating new socioeconomic realities, especially new relations between economy and territory. Thus, there is a convergence between these and other authors that the concept of territorial development corresponds to a new scientific paradigm that allows us to consider the economic, social, and environmental dimensions, which supposes the overcoming of disciplinary boundaries. In addition, there is agreement among such authors that the focus on territorial development questions the view of space, typical of the Fordist production model, favoring a multiscale and multidimensional view of development.

Pecqueur (2004) mentions the theoretical and methodological differences involved in the notions of local and territorial development. According to the author, the term territorial is preferable because it does not induce the idea of a small dimension or a smaller scale, nor does it correspond to the idea of localism or autarchy, in addition to becoming an innovation, insofar as the dynamics of territorial development aims reveal and value territorial resources and assets, especially those that are unprecedented.

Jean (2010) proposes to move from regional development to sustainable territorial development. For the author, the concept of territorial development breaks with older traditions about regional development. In another publication, Jean (2015) suggests a "solidary" territorial development as he understands the need for solidarity between human collectivities. For the author, a solidary approach to territorial development would allow a better understanding of how rural-urban relations should be built on actions and development dynamics.

Cazella and Carrière (2006), when referring to the development concept, affirm that there is no development dynamic without the creation or reinforcement of networks and new forms of territorial cooperation. As a result, territorial development presupposes cooperation between actors, whose interests are diverse, in the search for points of convergence, agreeing on decisions, in such a way that everyone benefits from the socio-territorial environment conducive to the generation of initiatives and new projects. In addition, Saquet (2018) states that territorial development needs to meet our physiological and anthropological needs in development for all that is, our daily practices, in the countryside and the city, need to be oriented and implemented for the reproduction of human life and non-human, through a plurality of emancipating subjects, of all shades, religions, and ethnicities.

Therefore, corroborating with the view of the previous authors, it appears, among other understandings, that development is always territorialized, in addition to being historically contextualized, needing to meet the plurality of interests present in the territory, fully understanding its multiple dimensions: environmental, social, cultural, economic, political, etc.

### 2.3 Methodological issues mentioned in publications

Most publications that refer to the territorial approach are dedicated to the public policy experiences evaluation, such as those applied in the rural sector. For example, when questioning whether the territorial approach would represent an institutional change or just an innovation by addition, Favareto (2010) states that the incorporation “by addition” of the new themes occurred in territorial policies. Thus, according to the author, there was no real institutional shift towards a territorial approach due to the sectoral bias of the actions, being exclusive to support agricultural activities, with the absence in the discussions of business organizations, preventing the expression of intersectionality in facing complex socioeconomic problems. In other words, understood in this way, in theory, a rural territorial development policy would not have been practiced; there would have been only one attempt, full of good intentions, with insipient results.

Vaz de Moura and Sousa Moreira (2014) highlight the relational perspective, pointing out fundamental issues in the analysis of actions that seek territorial development. Which actors are involved in what? What are the strategies of the actors? What is the degree of intervention of the different levels of action, and what are the possible impacts? What are the most important actors and resources mobilized during the definition of development projects? How are participation spaces configured? According to the authors, they are indications that must be present when thinking about development strategies of territories or regions when assuming the territorial approach, which has methodological implications.

Very few publications refer to methodological proposals. In one of them, Fuini (2014b) proposes elements of a methodological character involving the territorial aspects of development, indicating axes of analysis, namely, the economic, the political, the cultural, and the environmental. The economic axis includes the set of productive activities, circulation infrastructures, service and trade chains, the labor market, and the institutions representing the business community and workers. The political axis, it makes reference to local, regional, and national government bodies and to the legal norms and rules of planning that works

to make infrastructures feasible, regulate private actions, and distribute income increases among the population. In the cultural axis, it includes the set of historical traditions linked to productive activities, local know-how, pacts, and conventions signed, more significant events, industrial atmosphere, the culture of cooperation or individualism. Finally, in the environmental axis, it refers to the physical analysis, which can be seen as a natural resource, and to the socio-environmental impacts produced by the localized production networks and clusters, alongside the political agreements for damage mitigation and environmental recovery, inherent to the paradigm of development and environmental sustainability. In addition to the axes of analysis, the author proposes a scale of analysis (global, national, regional, and local) and historical cycles of analysis of the territorialization of development, in this case, referring to the economic history of Brazil. Fuini (2014b) contribution provides interesting elements of reflection, from the Geographic Science point of view, in addition to indicative for territorial studies. However, it lacks advances in specifying the variables to be considered in each axis.

Vieira (2013), in turn, highlights that the focus on eco-development contemplates several of the elements present in the debate on territorial development dynamics. However, it shows that “[...] in the analysis of the new emerging territorial dynamics, the consideration of the global socio-ecological problem remains deficient” (p. 129). To overcome such fragility, the author points out that it is necessary to face two intertwined problems. On the one hand, the need for a systemic approach to the integrated and shared management of natural resources, territorial space, and the quality of *habitats*. On the other hand, it shows the complexity inherent in the creation/perennialization of the territory resources. The author concludes that territorial resources must be considered the guiding axis of a hybridization process of the two approaches, the territorial and the eco-development. In the same publication, it presents elements that show the dialogue between eco-development and sustainable territorial development, as subsidies for new theoretical-methodological approaches when planning and managing sustainable territories, adjusted to a systemic-complex vision. Therefore, the contribution of Vieira (2013), in addition to converging with what is proposed here, reaffirms the idea of considering the notion of eco-development in the territorial approach.

Saquet (2018), referring to the territorial development premises, affirms that the activation of territorial development projects implies that we can propose methodological procedures with a perspective of trans and Multiscale analysis that consider the territories

in their dimension of complexity, conflictual, and heterogeneity, so that the development prospects to be suggested meet the physiological and anthropological needs of all and converge with the possibility of dignified reproduction of human and non-human life, meeting the plurality of subjects in the territory.

Rambo and Filippi (2012) highlight that the processes of territorial development refer to power relations, the ability of actors to make decisions and transform/restructure the space, impregnating new uses to the territories, which occurs at different scales. This aspect, according to the authors, methodologically needs to be considered. As for the scalar question, the authors assume the conception of Cox (1998), emphasizing that scalar relations can occur in dependence spaces, as being the arenas where individuals are rooted by their social, commercial, or employment interests, and engagement spaces, which would be the set of relationships that extend into spaces of dependence, but also beyond them, to build external association and exchange networks. Such questions have theoretical and methodological implications.

A final contribution is that of Bartoli (2018a; 2018b), who proposes a methodological approach in the form of an “urban-riverside territorial system” (STUR), converging with the territorial approach, to understand the dynamics of local networks of subjects, who through river navigation they interconnect and overlap the urban with the riverside, complementing the local economy. These are networks of subjects who use the city to build collective projects, with a certain territorial identity, producing territories of influence, through territorialities, forming new capillarity’s from the urban sphere, integrating the process of production, circulation, commercialization, and consumption of products from nearby or distant riverside areas. The studies were initially applied to Amazonian lands in the Parintins region, evaluating the spatial behavior of the circuits of the popular economy and mercantile capital.

The methodological approach in the form of STUR proposed by Bartoli (2018a; 2018b) facilitates the analysis of contexts with specific characteristics, such as isolated territorial sections of urban centers, the hierarchical position in the urban network, the presence of engineering systems that facilitate integration and flows with more dynamic areas, the composition of local capitals and types of fractions of elites, power networks, history of popular struggles and presence of socio-territorial movements, etc. That requires a range of “regionalized” methodological proposals, which take into account such geographical situations. This methodological approach type dialogues with the “geographical situation”

meaning proposed by Silveira (1999)<sup>7</sup>, oriented to the variable's analysis and articulation, agents, and processes at different scales, based on the particular focus, in the case of STUR, subjects, and urban-riverside processes. Thus, understood as a node of verticality and horizontality, as a provisional manifestation of the movement towards totalization, the "geographical situation" links universality and particularity. These and other territorial realities are historical formations and inheritances (BECKER; EGLER, 2011), whose aspects of regional inequalities are linked to the uneven development inherent in the reproduction dynamics of capitalist activities.

Chart 1 summarizes the main epistemic-theoretical contributions from these publications, highlighting their methodological implications.

Table 1: Synthesis of the main contributions of literature for guidance in territorial studies.

Publication	Main contribution	Methodological implications
Raffestin (1993) Fuini (2014b)	The territory as a portion of appropriate and delimited space that results from a collective production involving power relations.	Considering that the territorial approach of development is based on the concept of territory, the theoretical indications on the theme are bases to guide territorial studies, with implications that are not only theoretical but, above all, methodological.
Brunet, Ferras and Théry (1993)	The territory is not reduced to a legal entity, nor is it reduced to the idea of being rooted in a place; feelings of belonging and ownership are necessary.	
Beduschi and Abramovay (2003)	The territory is not just the neutral receptacle, assuming the role of an actor in socio-economic-cultural processes.	
Saquet (2015) Vaz de Moura and Sousa Moreira (2014)	The territory as a social, historical, and relational construction resulting from the meeting and the mobilization of social actors that seek to identify and solve common problems through negotiations, which allows agreeing with conflicting interests and identity construction.	
Pecqueur (2005)	The notion of "given-territory" (political-administrative delimitation, region, municipality) and "built-territory" (resulting from the mobilization of actors and territorial identity).	
Duarte (2009)	The territory as a field of power dispute, comprising a collective action cohesion in the debate, where the main challenge is the respect for the plurality of interests, opinions, and points of view, even if conflicting.	
Dallabrida (2015)	Collective action in the territory in search of convergences between the divergent interests of the actors in the territory, such as territorial governance practices.	
Saquet (2018)	Epistemological and ontological characteristics of the meaning of territory: (i) it is appropriate, dominated, and has a political, economic, cultural, and environmental content; (ii) it is produced in a complex trans and multi-scale territorial plot, with the nets and meshes at the base of each territory; (iii) it is produced through territorialities in a historical process centered on power relations, networks, and cultural identities.	

7 On the same topic, see Cataia and Ribeiro (2015).

Haesbaert (2007)	The discussion on territory and territorial approach need to be made from the perspective of the reticular paradigm: the territorial network, with a double movement perspective, in and about space, which is manifested by de-reterritorialization and multi-territoriality.	The discussion about territory and territorial approach need to be done from the perspective of the reticular paradigm (the territorial network). Methodologically, it implies the prioritization of approach methods and procedures of a multi-scale and multidimensional character, which allow for integrated analyzes.
Saquet (2018)	The territorial analysis centered on the concept of territory needs to consider its constitution in the form of networks (short, intermediate and long, virtual, ephemeral and lasting), enhancing the cooperation and solidarity networks anchored locally and in ecological and cultural processes, considering a more convergent environment with conflicts, contradictions, class struggle, and territorial disputes, than to consensual agreements.	
Veiga (2006) Sposito (2006) Favareto (2010)	Gaps observed in the Brazilian experience of applying the territorial approach in public policies: (i) almost all of the studies are focused exclusively on rural areas; (ii) the challenge of overcoming sectorial practices to incorporate territorialized practices; (iii) the permanence of a dichotomous view between ruralities and urbanities and the absence of a multisectorial view, of uniqueness and dialectical complementarity between the different dimensions of space; (iv) sectorial bias of actions in rural areas and the absence of business organizations, preventing the expression of intersectionality.	The gaps pointed out by the literature should serve as a reference, motivating initiatives, or practical proposals that overcome these challenges.
Lévesque (2010) Jean (2010, 2015) Pecqueur (2004) Dallabrida (2020c)	Synthesis of the argument about the option for the territorial development category, as converging to the territorial approach: (i) it represents a new academic discourse that surpasses traditional approaches to local and regional development; (ii) it is a new social discourse, designating new socioeconomic realities, especially new relations between economy and territory; (iii) corresponds to a new scientific paradigm that allows us to take into account the economic, social and environmental dimensions, in an integrated manner, which implies the overcoming of disciplinary boundaries; (iv) its focus favors a multi-scale and multidimensional view of development; (v) the term territorial does not induce the idea of a small dimension or a smaller scale, nor does it correspond to the idea of localism or autarchy; (vi) the concept breaks with older traditions about regional development, with a dominant focus on the economic dimension.	The arguments of the mentioned authors are fundamental to reaffirm the option of assuming the category “territorial development” in studies that have the territorial approach as a method and the territorial heritage as a reference. It is a development sustained in the reticular paradigm concept, which meets the physiological and anthropological needs of the plurality of territorial subjects, oriented to the reproduction of human and non-human life. In this sense, it is necessary to highlight the dimension of development sustainability, that is, the notion of eco-development.
Cazella and Carrière (2006)	There is no dynamic of territorial development without the creation or reinforcement of networks and new forms of cooperation between actors in the search for points of convergence between the diversity of interests, generating an environment conducive to the generation of initiatives and new projects.	
Saquet (2018)	Territorial development needs to meet our physiological and anthropological needs, in development for all, that is, our daily practices, in the countryside and the city, need to be oriented and implemented for the reproduction of human life and non-human, through a plurality of emancipating subjects, of all shades, religions, and ethnicities.	
Vieira (2013)	The focus on ecodevelopment contemplates several of the elements present in the debate on territorial development dynamics.	

Source: Prepared by the authors (2021).

Therefore, considering the principles enunciated in the epistemic-theoretical fields proposed in Dallabrida, Rotta, and Büttenbender (2021), in addition to the contributions of the authors mentioned in this first section of the article, it is possible to make a synthesis in the form of a “decatalogue of the territorial approach of the development”<sup>8</sup> highlighting

<sup>8</sup> The use of the term “decatalogue” has no connotations of a theological or deterministic nature. This is a figurative use, in the sense of representing a set of principles and/or guidelines.

its implications for territorial planning and management: (i) that four theoretical categories support the territorial approach to development, “territory” as the socioeconomic-cultural and environmental structure located spatially and historically, “territorial governance” as the process of socio-territorial conversation to define the desired future, “territorial heritage”, as a form represented by the spatial arrangement (socioeconomic-cultural and environmental) resulting from inheritances of the historical and recent past, and “territorial development”, as a function of the form, that is, the socio-territorial project with the desired future; (ii) the need to consider the territorial profile under analysis, as a set of components and variables organized, interdependent and integrated, which implies understanding the reality from its different interrelated dimensions, without any nullifying the characteristics of the others, even if antagonistic or competing, in an attempt to overcome disciplinary or sectoral approaches; methodologically considered in the analyzes centered on the territory concept, (iii) the need for the use of multidimensional, multidisciplinary analysis methods that fully consider the variables under analysis and (iv) taking into account the constitution of territory as a form of network (short, intermediate and long, virtual, ephemeral and lasting) (v) considering that the whole is in the parts preserve their identity in a dialogical relationship between unity and diversity, it is essential to regard that there are no universal methodological procedures that can be applied identically in all territories; (vi) considering the principle of incompleteness and uncertainty, it is necessary to understand the territory as a dynamic context, in the process of change and constant (re) construction; (vii) considering that territorial configurations have a plural character and are full of conflicts and contradictions, methodological procedures need to consider this situation to be able to interpret the historical and social reality, recognize the articulations and connections between problems and potentialities, in addition, to analyze developments; (viii) due to the notion of decoloniality, it is urgent to avoid the exclusion and silencing of subjects, knowledge, and worldviews present in the territory, as explanatory and/or conduct guidelines; (ix) considering the decentralization perspective, it is essential to give priority to development policies, both the sectors of hegemonic activities, as well as the non-modern activities present in the territory; (x) when thinking of development alternatives, there is an urgent need to adhere to the indicative regarding the equitable redistribution of territorial resources, goods<sup>9</sup>.

To this indicative synthesis on the territorial approach of development, with a transversal character, a conclusion is enlisted, composed of three principles that consider

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<sup>9</sup> This theme is addressed in Morales et al. (2020), by proposing a territorial culture centered on “what is common”, with a view to an “inclusive territorial development”.



the humanitarian and environmental perspective: socio-economic-cultural inclusion, institutional resilience, and environmental sustainability<sup>10</sup>. The challenge is the convergence between such beliefs in the processes that constitute the territorial dynamics of development.

### **3 Methods and their convergence with the territorial approach of development**

Once the record on the epistemic-theoretical conceptions has been made, it remains to advance, contributing to this second section with indications on approach and procedure methods and their convergence with the territorial strategy.

#### **3.1 Approach Methods**

The scientists involved in research projects, even those that are focused on the territorial approach, come from several disciplinary fields in the fields of applied human, social, and social sciences<sup>11</sup>. In these areas, research coexists from the most diverse approach methods: empirical-analytical, phenomenological, dialectical-critical, systemic, complex-paradoxical, among others. This coexistence does not represent passivity or the absence of contradictions and conflicts, but it does indicate different epistemological positions, some in dialogue, others less so. However, what is pointed out here is the possibility of an epistemological option that enables the dialogue between researchers who integrate research projects focused on the territorial approach.

The analytical approach is the basis for research driven by the interest of technical control, which aims to provide information that allows manipulating and controlling objects through processes that are also controlled, and objectified. This basic focus is based on the logical set of work-technique-information, considering work as the fundamental dimension of reality. It is admitted, as the ultimate criterion of truth, the fidelity to the object (objectivity). The determining investigative procedure is to divide/decontextualize to control. The underlying anthropological concept is expressed through technical and

<sup>10</sup> The explanation of these principles and their implication in the territorial dynamics will not be a subject for further study in this text. In summary, institutional resilience refers to the set of organizational skills and routines that allow successful performance in each of the stages of adverse events (anticipation, coping and adaptation) (DUCHEK, 2019). On this topic, it is additionally suggested the reading of Morales et al. (2020). The issue of inclusion and sustainability, directly or indirectly, is addressed by authors mentioned here, such as Vieira (2013; 2009) and Saquet (2018; 2015).

<sup>11</sup> One of the cases is the involvement of more than thirty researchers, from universities from Brazil, Colombia, Portugal and Spain, in the research project *Territorial heritage as a reference in the development process of territories or regions*, proposed in the second semester 2020, therefore, still in the initial implementation phase.

functionalist categories, identifying humans with the roles they play: social worker, teacher, psychologist, etc. In this approach, human history is reduced to the variable date, and the general and instantaneous view of a given subject is analogous to photography. The positivist and functionalist models are guided by the analytical approach, which presupposes a fixed, functional, predetermined, homogeneous, and non-conflicting view of reality, based on the principle of identity, preferring the description of the ordered universe, subject to permanent laws. In this approach, conflicts of interpretations presuppose universal coherence as something previously given and not as a deontic principle, in the sense that contradictions must be avoided in language and in action (SÁNCHEZ GAMBOA, 1987; 2007; ARENHART; ARENHART, 2017).

The hermeneutic approach works based on research, driven by the dialogical interest of consensus, in the lived sociocultural world, where and when the purpose is to assist the investigation and the interaction of the subjects. The logical set that governs the research of this epistemological tendency is language-consensus-interpretation, taking linguistically-mediated interaction as a fundamental dimension. Thus, the criterion of truth must be the intersubjective consensus of the group to which the researched phenomenon concerns. Therefore, the determining investigative procedure is to contextualize, recover the contexts of meaning, the horizons of interpretation of the phenomena. The implied anthropology is expressed by existentialist categories, such as project, being-in-the-world, being of relationships (SÁNCHEZ GAMBOA, 2007, p. 170-177).

Hermeneutic research takes the history of phenomena as the guiding thread of interpretation, privileging living and dynamic existence to the reified essence (SÁNCHEZ GAMBOA, 1997). They see reality as a movement, as an “unfinished world”, they are concerned with perceiving phenomena in their future, they emphasize the problem of conflict of interpretations, pushing conflicts of interest to a secondary level. Making a relationship between dialectics and hermeneutics, Stein (1986, p. 31-32) maintains that hermeneutics as reflective thinking about our time “[...] aims primarily at mediation and unification with the same”; thinking about our historical time, the hermeneutic approach “[...] seeks in many ways the lost unity”. Hermeneutics would be a possibility that reflection has to meet the present historical reality, looking carefully to penetrate it (ARENHART; ARENHART, 2017).

The dialectical approach is connected to the critical emancipatory human interest. Research is conducted to develop criticism and feed the praxis that transforms reality and frees the subject from different forms of instrumentalization, domination, and deception. It corresponds to the logical power-emancipation-critical set. As a fundamental dimension of

research fields, it focuses on power relations. It embraces emancipatory praxis as a criterion of truth, that is, social and psychodynamic desalination. This results in the determining investigative procedure: explaining the contradictions, diagnosing the limitations to emancipation and its possibilities. This approach conceives the human being as a social and historical being, determined by economic, political, and cultural contexts, creator and transformative, in the search for greater levels of freedom, acquired through permanent struggles and overcoming social contradictions (SÁNCHEZ GAMBOA, 2007).

Dialectical research considers history as the axis of scientific explanation and understanding and has social and political action as one of the main epistemological categories (SÁNCHEZ GAMBOA, 1997). They underline the nexus between conflicts of interpretations and conflicts of interest, emphasizing the critical-emancipatory interest. Stein (1986, p. 31-32) shows that dialectics as a method of conceptual apprehension of our time “accentuates the difference, the contrast”; through it, the reflection meets the historical reality, addressing itself basically “against its time”. Criticizing ideologies produces rationality by diagnosing social pathologies, thus detecting the “rupture of meaning” (ARENHART; ARENHART, 2017).

The complex-paradoxical (or eco-systemic) approach can be characterized using the criteria established by Sánchez Gamboa (1997; 2007). The procedure in question is managed by ecological cognitive interest. What counts as a priority are the corresponding interactions with the environment, the quality of life. In this ethical-epistemological framework, the research aims to optimize the vital relationships of human beings (and other living beings) with nature. Therefore, interdisciplinary dialogue (translation) is taken as a relevant criterion of truth. Contextualizing the phenomena (distinguishing and uniting) and dialoguing with other specialists are crucial tasks for this investigative procedure.

Epistemic-theoretical studies with a complex-paradoxical character, such as Edgar Morin, Ilya Prigogine, Isabelle Stengers, Henri Atlan, Humberto Maturana, Francisco Varela, David Bohm, Fritjof Capra, and Pedro Demo (after 2000), are privileged. In this frame of thought, the criterion of scientificity is the connection (interdisciplinary or transdisciplinary) with the whole (eco-logical reason - distinguish and unite). Science is conceived as being governed by several principles of intelligibility (dialogical, recursive, holographic principle, etc.), based on intersubjectivity and “objectivity in parentheses” (MATURANA, 2014), so that self-eco-organization is taken as a fundamental epistemological category. The contextualization of the phenomena is done through efforts of interdisciplinary articulation (triangulation of methods) (ARENHART; ARENHART, 2017).

In line with the aforementioned theoretical-epistemological concepts, cognitive actions focus on the relationship of concrete human beings (and other living beings) with nature (quality of life), in a historical perspective, since human beings understand themselves as part of nature, interrelated with the environment, through action and language. The evolutionary and historical process is seen in a diachronic and dialogical way (order-disorder-interactions-reorganization), as auto-eco-geno-pheno-socio-organization. Reality is conceived as an open, self-organizing, and communicating system. The fundamental structuring concept is that of self-eco-organization. The activities of the (different) scientific communities are located within (different) domains of operational coherence, distinguished by the observers in the practice of their living and seen by them as “domains of reality”. In line with these constructs, objectivity is placed in parentheses (MATURANA, 2014). And the totality is cognitively targeted as a self-eco-organizing nature (ARENHART, 2020).

Pedro Demo, since 2000, sees complex thinking as modulation of dialectics. He does this by identifying the Hegelian-Marxist principle of unity of opposites with Morin’s dialogical principle (order-disorder-interactions-reorganization) and submitting nature to the principles of the critical-dialectic approach. But paradoxically, it is from this theoretical-methodological conversion that the author begins to focus on solidarity, a notoriously thorny situation for a critical-dialectic intellectual (DEMO, 2002). Hence the question wouldn’t it be more appropriate to insert the different versions of dialectics as complex-paradoxical thinking modulations? The principles that govern this approach require that the practical-social, vital, existential, and theoretical contradictions be made explicit in the theme of any feature or section of what we call “reality”.

Appendix 1 lists the different methods of approach that can be applied in territorial research. Looking for conformity with the reflections made in the first section of this article, comments are made in the sense of its approximation with the territorial approach.

But, anyway, what approach methods to take when the research is carried out by a group of multidisciplinary formation?

For the research groups, Minayo (2014) proposes the triangulation of methods as a possible alternative to carry out the dialogue between the different ones. In fact, 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 to deepen an interdisciplinary

discussion in an interactive and intersubjective way. According to the author, the reflective process of the triangulation of methods 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.

From a theoretical and practical point of view, the success of the method triangulation process lies in three opposing and complementary attitudes: (i) a deep respect for disciplinary fields; (ii) relativizing the fragmented view of each of them; (iii) the researchers' dialogical capacity in the face of different theoretical and methodological proposals and with the subjects who work in the world of life (MINAYO, 2014). But triangulation does not prevent the development of theories, analyzes, and publications specific to the field of knowledge of each researcher. The disciplinary production, resulting from the experience of triangulation, which shares the reflections of other areas, will never be equal to the fruit of the monological effort of the individual and solitary investigator. Based on his research experience in the health field, Minayo (2014, p. 372) conceives the proposal of the triangulation of methods as "inter-fertilization of knowledge." By the way, Ardoino (2012), for a long time, advocates in favor of the multi-referential approach, a thesis that brings him closer to Edgar Morin.

For the authors cited, it can be noted that what we are looking for here is not a monist/unitary view, in which all the research results would be subordinated to a single logic. Assmann and Mo Sung (2000, p. 148) underline the theoretical-methodological thesis that "[...] we must work with a simultaneous plurality of diverse organizational principles of society". But, as a challenge, we should not be exempt from setting some reference points that enable the triangulation of methods and the inter-fertilization of knowledge, even if these do not define procedural methods for the production, analysis, and interpretation of information. If, for example, the methods of analyzing and interpreting information do not coincide, the sharing results are likely to be broader and more diverse. In terms of procedures, statistical analysis, content analysis, discourse analysis, textual discursive analysis, depth hermeneutics, hermeneutic model of the correspondence of text/context relationships and others, properly applied, may be usefully complementary within a shared (enabling dialogue) frame of reference.

It is reasonable to think that this frame of reference is something like an editorial line for a communication company. In academia, due to the influence of thinkers who deal with

theoretical-methodological assumptions, in recent years, this has been called an “approach”. It is the theoretical-methodological perspective, the focus, the doctrinal preparation. It serves to choose and assemble what goes in and what goes out. By analogy, one can speak of “reference points”. These reference points are structuring concepts that, jointly, like the world of life for ordinary people, manage the operations of the group of researchers, constituting a context and resources for rational understanding.

In this sense, García Canclini (2003a), when studying the multiple ethnic-cultural communities of the metropolis of Mexico, presents another concept that may be fundamental in the studies of the territorial approach, the idea of *hybridization*. Through this term, the author designates artistic, technological processes, etc., in which discrete structures, objects, and practices, existing separately, are combined and give rise to new structures, objects, and practices. The hybridization metaphor is valuable because: (i) it excludes the claim to establish “pure” identities; (ii) shows the risk of delimiting self-contained or separate local identities and opposed to any otherness; (iii) prevents the cultural practices from being separated from the history of mixtures in which they were formed; (iv) draws attention to the relatively arbitrary and contingent character of all culture, one of the bases for recognizing the difference, necessary in the democratic game; (v) it helps to free us from fundamentalist temptations and the fatalism of doctrines about civilizing wars; (vi) it serves to enable the recognition of the productivity of exchanges and crossings and enables the participation of several symbolic repertoires; (vii) makes it possible to understand the totality; (viii) and enables the analysis of macro-social processes (GARCÍA CANCLINI, 2003b).

The interest of researchers and social and political agents with the totality makes sense when, being interested in cultural differences, the concern with social inequalities also emerges. Although the autonomy of cultural fields is not dissolved in the global laws of capitalism, it is subordinated to them with unprecedented ties (GARCÍA CANCLINI, 2003a). Macrosocial perspectives are necessary for anyone who wants to “[...] understand and intervene in the contradictions of capitalism that transnational itself in an increasingly concentrated way” (GARCÍA CANCLINI, 2005, p. 27). Still, according to the author, no individual or collective subject can, by itself, give the key to the social. Since the local plot of culture is penetrated on all sides and in unexpected ways by an international message market, the sociological view serves precisely to “[...] avoid the illusory isolation of local identities and informal loyalties, for inclusion in the analysis the reorganization of the culture of each group

by the movements that subordinate it to the international market or at least demand that it interacts with it" (GARCÍA CANCLINI, 2003a, p. 254).

The recognition of the specificities of the different epistemological approaches (approach methods), with their philosophical assumptions and their respective dominant operational logics, allows us to move in the direction of a "triangulation of methods" (MINAYO, 2014) without falling into eclecticism or monism, but rather looking for the "inter fertilization of knowledge." This attitude can mean an important advance in studies and research on territories and territorial approach, still marked by fragmentation and the difficulty of advancing concerning epistemological and methodological debates.

### 3.2 Procedural methods

The territorial approach implies an understanding of plurality, multidimensionality and requires multifocal observation and analysis. According to Saquet (2007), it consists of processes, networks, rearrangements and contradictions, heterogeneity of times and territories, just a way of contemplating the (i) materiality of the living world. Thus, it is observed that the theoretical and methodological reflections that address the territorial theme and its consequences are increasing in the Brazilian and international academic scenario, generating contributions for research and study groups from universities and official development entities that may contribute a lot in the strengthening and qualification of public policies aimed at territorial development.

Given this plurality and multidimensionality, characteristic of studies that follow the territorial approach, the proposal presented by Minayo (2014) of the triangulation of methods seems to us the most appropriate posture to carry out the dialogue between the different ones, implying the use of various methodological procedures, in particular, in investigations involving groups of researchers from different disciplinary areas. It is understood that the methodological dialogue allows the deepening of the interdisciplinary discussion, in an interactive and intersubjective way, enabling the construction of a kind of "editorial line", capable of guiding the definition of the instruments for collecting and analyzing the necessary data to make the research feasible, based on clearly established objectives.

The detailing of methodological assumptions and their convergence with the territorial approach is evidenced as central to the quality and breadth of the research results. Thus, a set of procedural methods is proposed for the definition of sources, data collection, and analysis techniques, which may contribute to the realization of studies within the scope

of the territorial approach. However, it is reaffirmed that the quality of the research has a direct relationship with the epistemic-theoretical-methodological assumptions defined within it, in an attempt to reduce its falsifiability or refutability prospects, as Popper (2004) warns.

To give an operational account of the research methodology, the description procedures and data sources are initially detailed, and then data collection techniques are exposed and described. The procedures and sources of data collection are concentrated in the bibliography, documents, interviews, questionnaires, scales, observation, and forms. Both are described and detailed in Appendix II of this article.

Procedural approaches, depending on the research objectives, require the planning and use of more positivist or constructivist basic methods and tools (CRESWELL, 2010). Data collection requires not only the choice of one or another procedure and source, as well as one or the other technique, but also to consider the combination of several procedures, sources, and techniques, to generate qualitative or quantitative data to meet the objectives of the research (GODOI; BANDEIRA-DE-MELLO, 2007), thus guaranteeing research data security for systematization, analysis, and intended results, to support the hypotheses and theses involved.

In Appendix III, the most used research techniques and procedures for data collection are listed. The detailing of techniques indicates the possibility of the presence of possible pitfalls in the research, as highlighted by Cardoso (1988) when he affirms that the collection of material is not only a moment of accumulation of information but is combined with the reformulation of hypotheses, with the discovery of new data collection clues that result in the use of mixed methods, which combine different data collection techniques. This list of techniques includes reading procedures, data collection or *survey*, observation, focus group interviews, in-depth interviews, projective procedures and methods, measurement scales or computation, and questionnaires.

As for the data collection procedures in qualitative research in territories and their possible content complications, it refers to their meaning in social practice and is expressed as social, cognitive, subjective, evaluative, and emotional representations in the context, as indicated by Franco (2008). For this reason, it is significant to highlight the relevance in defining the universe to be researched and the delimitation of the sample extract. The sampling technique, as well as the definition of the sample size, are fundamental for the space framework and the universe to be researched.



Sampling procedures and techniques can be classified as non-probabilistic and probabilistic. Non-probabilistic sampling depends on the researcher's criteria and may be for convenience, judgment, quotas, and the "snowball" type (the first guests indicate new ones to be interviewed). In probabilistic sampling, the sampling units are chosen by chance. It is possible to specify each potential sample of a certain size that can be extracted from the population, as well as the probability of selecting each sample (MALHOTRA, 2001). The probabilistic sampling procedures and techniques vary concerning sampling efficiency and not in the chance of selecting the sampling elements and are classified into simple random sampling, stratified sampling, and cluster sampling.

As for the data analysis and interpretation procedures, to answer the research questions and objectives, it constitutes the decisive phase of the investigation process, when the collected data and generated materials lead the researcher to theorize about the data, producing the confrontation between the previous theoretical approaches and the new weights and results of analysis and interpretative considerations. Because several procedures and forms can contribute to the data analysis and interpretation processes, Minayo (1994), corroborated by Gil (1999), define that in social science research, there are steps that can be observed such as (i) establishment of categories; (ii) coding; (iii) tabulation; (iv) statistical analysis of data; (v) evaluation of generalizations obtained from the data; (vi) inference of causal relationships; and (vii) data interpretation.

Zamberlan et al. (2016) suggest data analysis procedures and techniques most used in scientific research processes, such as content analysis, discourse analysis, historiography, document analysis, mathematics, and statistics. These analysis techniques and procedures are detailed in Appendix IV.

The completion of the data collection, analysis, and interpretation of data, culminates with the final stage of the research process, which consists of recording the results in a written document. This document can consist of a research report or academic document systematizing a course conclusion work, dissertation, or thesis.

#### **4 Final considerations**

The territorial approach constitutes an effort to understand a vast universe, plural, multidimensional and multifocal, and in this sense, the researchers' demand for clarity regarding the epistemic-theoretical-methodological elements that support their research.

The publications referred to here and considered relevant allow us to conclude that the theme of territorial approach and territorial development is addressed in many publications, in some of them in a more central way, in others more peripheral. Almost all publications restrict the territorial approach to the focus on the rural/agrarian dimension. Another issue that can be perceived is that the territorial approach is used, in most texts, without having the concern to refer to questions of an epistemic-theoretical order. Regarding methodological issues, the publications that refer make little progress, being restricted to generic mentions, without presenting indications about the research practice. Thus, new contributions on the territorial approach, conceptual categories, and methodological assumptions converging with the territorial approach are very welcome.

The concern with questions of an epistemic-theoretical-methodological nature has the purpose of qualifying research processes that have the purpose of exploring innovative and sustainable alternatives for territorial development. Territories face the interaction between man and nature because a single method may not be enough to subsidize interdisciplinary research teams. Research in territorial development necessarily encompasses multiple dimensions, bringing into dialogue, at least, social/human sciences and natural sciences.

The methodological proposition presented here, which is understood to be convergent with the territorial approach, involves the recognition of the specificities of the different epistemological approaches regarding their respective logics and philosophical assumptions. This recognition can free researchers from the traps of fragmentation and eclecticism, enable multi and interdisciplinary dialogue between researchers who use different procedural methods of production and analysis of information, and, thus, favor the inter-fertilization of produced knowledge, hybridization, from different sources, including, due to different cognitive interests. It is for this reason that, based on the central argument made in Dallabrida, Rotta, and Büttenbender (2021), that the methodological approach and procedures emanate from a certain epistemic-theoretical conception in the first section of the article, convergent epistemic-theoretical conceptions were systematized with the territorial approach that can serve as a basis for the methodological assumptions mentioned here.

Therefore, it seems that the triangulation of methods proves to be fruitful to support research focused on the territorial approach of development. Thus, referring to what is proposed by Minayo (2014), that the recognition of the specificities of the different

methods of approaches with their respective logics and philosophical assumptions can be made possible in the researches carried out by interdisciplinary groups through the triangulation of methods. This triangulation is capable of: (i) enabling dialogue between different people; (ii) encourage internal debate; (iii) making complementarity feasible; (iv) enhance the contribution of different areas of knowledge; (v) generating greater theoretical clarity and (vi) to overcome the false dichotomies of objectivity/subjectivity, qualitative/quantitative and macro/micro, towards a collective construction founded on dialogued and argumentative practice.

In procedural terms, stood out a set of methods, techniques, which can subsidize studies within the scope of the territorial approach, in the definition of sources, collection, analysis, and interpretation of data, of a more qualitative or quantitative nature, depending on the objectives of the research. It is recognized that some of the procedures mentioned in the text must be highlighted, such as action research, without, however, ruling out the possibility of using traditional methods. The main indication is to move towards overcoming segmented approaches that result in exclusively sectoral analyzes.

On territorial development, to paraphrase Professor Arilson Favareto<sup>12</sup>, it is understood that there are three main conditions for its effective practice: (i) the need to weave plural coalitions between territorial actors; (ii) the challenge of building social pacts, which imply a minimally equitable distribution of territorial resources, or better saying, public goods (natural resources - land, air, water, environment...) -, technologies generated in public universities (science and technology at the service of the whole of society) and opportunities for promotion (personal, professional and social, among others), among the plurality of actors in the territory; besides (iii) the presence of scholarly integrated institutions, focused on the planning and management of the territory. A fourth condition could be added: we need to think beyond what exists and is considered sufficient to achieve development! The allusion is made, in particular, to the fact that the intended development, considering its multiple dimensions, for example, does not generate social inequalities and environmental degradation. If this is seen in the processes of territorial development, we are witnessing mere economic growth.

It is recommended for future works, considering the purposes of the Research Project mentioned here, however, serving as an indication for new investigations, which deepens the question of applicability/suitability, in particular, of the procedure methods usually used

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12 Fragments of lecture given at *V Regional Development, State and Society Seminar - SEDRES*, 03/25/2021, at Unitaú, in Taubaté (SP).

in research, in addition, to contemplate a deep reflection on the planning practices of new perspectives of territorial development, concerning meeting the interests and desires of the territory, opposing, or adapting to the new technologies and intentionalities demanded globally.

Finally, it is indicated, from this article on territorial approach, conceptual categories and methodological assumptions converging with the territorial approach, (i) that research and studies in the area, progressively, require a greater theoretical and empirical foundation, clarity and methodological rigor, (ii) that, more than the use of one or another methodological approach, accompanied by one or the other research procedure, the future quality of research on territories and territorial approach must be sustained on an epistemic-theoretical basis and in the combination of instrumental to encompass the breadth and consistency of the responses to the objectives formulated for the research and, thus, (iii) to contribute more effectively with the advances of sciences in the area and the contributions on processes of territorial development.

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## APPENDICES

### Appendix I – Métodos e sua convergência com a abordagem territorial

Métodos de Abordagem	Caracterização Básica	Adequação à abordagem territorial
Empírico-Analítico	A abordagem analítica, segundo a concepção antropológica subjacente, expressa-se por meio de categorias tecnicistas e funcionalistas. Orientam-se pela abordagem analítica, os modelos positivistas e funcionalistas, os quais pressupõem uma visão fixista, funcional, predeterminada, homogênea e não-conflitiva da realidade, fundada no princípio de identidade, preferindo a descrição do universo ordenado, sujeito a leis permanentes.	Os modelos positivistas e tecnicistas pressupõem uma visão predeterminada e homogênea, não conflitiva, da realidade. O território não é uma realidade homogênea, sim conflitiva, o que implica priorizar métodos multidimensionais e abertos à considerar fenômenos e processos contraditórios, buscando convergências, não modelos universais.
Fenomenológico (hermenêutica)	A hermenêutica atua na base das pesquisas movidas pelo interesse dialógico de consenso, no mundo vivido sociocultural, onde e quando a finalidade é auxiliar a investigação e a interação dos sujeitos, dando ênfase à problemática do conflito de interpretações, empurrando para um plano secundário os conflitos de interesses. A hermenêutica seria uma possibilidade de que a reflexão dispõe para se encontrar com a realidade histórica presente, procurando cautelosamente penetrar nela.	A abordagem fenomenológica deixa em segundo plano o conflito de interesses, o que é fundamental em realidades complexas e desiguais em poder e oportunidades, como é o caso de contextos territoriais.
Dialético-Crítico	A abordagem dialética conecta-se ao interesse humano crítico-emancipador, visando a transformação da realidade e libertação dos sujeitos das diferentes formas de instrumentalização, dominação e enganação. Concebe o ser humano como um ser social e histórico, determinado por contextos econômicos, políticos e culturais, criador e transformador. Metodologicamente, permite explicitar as contradições, diagnosticar os bloqueios e as possibilidades de superação dos mesmos.	Todo processo de diagnóstico da realidade de um determinado recorte territorial, só tem sentido se for capaz de identificar contradições, bloqueios e prospectar formas de superação e avanços. Se considerarmos a abordagem territorial como processo de superação de visões determinísticas, esse método de abordagem nos orienta ao novo, em termos de planejamento e gestão territorial.
Sistêmico Complexo-Paradoxal	Para essa abordagem, as pesquisas visam otimizar as relações vitais dos seres humanos (e outros vivos) com o meio natural. Por conseguinte, o diálogo interdisciplinar é tomado como um relevante critério de verdade, pois contextualizar os fenômenos e dialogar com outros especialistas são tarefas determinantes para esse procedimento investigativo. Para esta abordagem, a ciência se concebe como sendo regida por vários princípios de inteligibilidade, exigindo análises e interpretações inter(trans)disciplinares, sendo que a contextualização dos fenômenos se faz mediante esforços de articulação interdisciplinar (triangulação de métodos).	A abordagem territorial exige, necessariamente, observações, análises e interpretações multidimensionais da realidade o que supõe a contribuição multidisciplinar. As análises e interpretações resultarão de esforços interdisciplinares. Há, portanto, uma forte convergência do método de abordagem sistêmico-complexo-paradoxal com a abordagem territorial



<p>Método Multireferencial-Híbrido, "Interfertilização de Saberes" e "Triangulação de Métodos"</p>	<p>A triangulação de métodos de abordagem pode ser considerada uma alternativa necessária para realizar o diálogo entre os diferentes focos disciplinares. O diálogo metodológico propicia maior clareza teórica e permite aprofundar uma discussão interdisciplinar de forma interativa e intersubjetiva. Já o processo reflexivo da triangulação de métodos possibilita buscar a articulação de dados objetivos (indicadores, distribuição de frequência e outros) e dados subjetivos (significados, intencionalidades, interação, participação). Trata-se de evitar ou desfazer a dicotomização entre quantitativo e qualitativo, entre macro e micro, entre interior e exterior, entre sujeito e objeto.</p>	<p>O projeto de pesquisa <i>O patrimônio territorial como referência no processo de desenvolvimento de territórios ou regiões</i>, ao assumir a abordagem territorial como método e propor-se à qualificação de processos localizados de desenvolvimento, convergindo para a perspectiva de valorização das potencialidades socioeconômicas, culturais e ambientais dos territórios, assumindo o seu patrimônio territorial como referência, só podia, por isso, ser constituído por uma equipe multidisciplinar. Apresenta-se o desafio de um aprendizado coletivo com o fim de exercitar a pesquisa multidisciplinar, pela utilização de métodos de abordagem e de procedimento adequados a esse propósito.</p>
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Source: Prepared by the authors (2021)

#### Appendix II – Procedimentos, fontes e suas descrições da pesquisa

Procedimentos e fontes	Descrição
Bibliográfica	Abrange todo o referencial teórico já tornado público em relação ao tema de estudo, como publicações avulsas, boletins, jornais, revistas, livros, pesquisas, monografias, teses, material cartográfico, meios de comunicação orais e audiovisuais (LAKATOS; MARCONI, 2003).
Documentos	A fonte de coleta de dados refere-se a documentos, escritos ou não, que podem ser recolhidos quando o fato ou fenômeno ocorre, ou depois (LAKATOS; MARCONI, 2003).
Entrevista	Técnica em que o investigador se apresenta ao investigado e lhe formula perguntas, com o objetivo de obtenção dos dados, sendo uma fórmula de diálogo assimétrico, em que uma das partes busca coletar dados e a outra se apresenta como fonte de informação (GIL, 1999)
Questionário	É um instrumento de coleta de dados constituído por uma série ordenada de perguntas, que devem ser respondidas por escrito e sem a presença do entrevistador (LAKATOS; MARCONI, 2003).
Escalas	Instrumentos construídos com objetivo de medir a intensidade das opiniões e atitudes de maneira objetiva. Apresentam-se de diversas formas, porém consistem basicamente em solicitar ao indivíduo pesquisado que assinale, dentro de uma série graduada de itens, aqueles que melhor correspondem à sua percepção acerca do fato pesquisado (GIL, 1999).
Observação	Consiste em uma técnica de coleta de dados para conseguir informações e utiliza os sentidos na obtenção de determinados aspectos da realidade. Não consiste apenas em usar os sentidos, mas também em examinar fatos ou fenômenos a estudar (LAKATOS; MARCONI, 2003). Conforme Yin (2001), destacam-se duas formas principais desta técnica: a direta e a participante.
Formulário	É um instrumento para obter dados e/ou informações de um objeto de estudo, por meio de um roteiro estabelecido pelo pesquisador, para efetuar registros e anotações (MALHOTRA, 2001).

Source: Adapted by the authors of Machado and Silva (2007, apud Zamberlan et al, 2016)

Appendix III – Técnicas de coleta de dados e procedimentos de pesquisa

Técnica de coleta de dados	Procedimentos
Procedimento de leitura	Trata-se de procedimento de coleta de bases conceituais, referências e dados, atendendo ao delimitado nos objetivos da pesquisa. Os procedimentos de leitura podem ser de natureza exploratória, reconhecimento de materiais, leituras exploratória, seletiva, reflexiva e/ou interpretativa, resultado em aprendizagem e produção cultural (SALVADOR, 1986).
Levantamento ou Survey	A técnica levantamento, também chamada de <i>Survey</i> ou ainda de <i>enquete</i> (ZAMBERLAN et al, 2016) é a opção quase unânime dos pesquisadores para a coleta de dados primários. A escolha da técnica de coleta de dados é um ponto crítico no processo de pesquisa. Sugere-se que os questionários de levantamento possam ser apresentados de quatro maneiras principais: (i) entrevistas pessoais; (ii) entrevistas telefônicas; (iii) entrevistas pelo correio e (iv) eletrônicas.
Observação	É uma técnica frequentemente empregada em estudos descritivos no campo da gestão. A observação envolve o registro sistemático de padrões de comportamento das pessoas, objetos e eventos, a fim de obter informações sobre o fenômeno de interesse. Os procedimentos e técnicas observacionais podem ser estruturadas ou não-estruturadas, diretas ou indiretas, além disso, a observação pode ser realizada em um ambiente natural ou planejado (MALHOTRA, 2001).
Entrevista Tipo Grupos de Foco (Focus Group):	É definido como um tipo de entrevista que requer um moderador treinado, de uma forma não-estruturada e natural, com um pequeno grupo de respondentes, cujo objetivo principal é obter uma visão aprofundada, ouvindo um grupo de pessoas do espaço, do território, ao discorrer sobre problemas de interesse do pesquisador. O valor da técnica está nos resultados inesperados que em geral se obtém de um grupo de discussão livre. Segundo Malhotra (2001), os grupos de foco constituem o processo mais importante de pesquisa qualitativa e são tão populares no âmbito das pesquisas que muitas pessoas consideram esta técnica um sinônimo de estudo qualitativo.
Entrevistas em Profundidade	Caracterizam outra técnica para obter dados qualitativos, como uma entrevista não-estruturada, direta, pessoal, em que um único respondente é entrevistado de cada vez, para descobrir motivações, crenças, atitudes e sensações com relação a algum assunto. Da mesma maneira que os grupos de foco, as entrevistas em profundidade constituem uma forma não-estruturada e indireta de obter informação. Ao contrário dos grupos de foco, as entrevistas de profundidade são realizadas uma a uma e são recomendadas por avaliarem aspectos não revelados coletivamente.
Procedimentos e Técnicas Projetivas	É uma forma não-estruturada, indireta, de perguntar, que incentiva os entrevistados a projetarem suas motivações, crenças, atitudes ou sensações subjacentes, sobre problemas em estudo. Os procedimentos e técnicas subjetivas são diferentes pelo fato de procurarem disfarçar o propósito da pesquisa. Já nos procedimentos e técnicas de entrevistas em profundidade e os grupos de foco, os objetivos e propósitos da pesquisa são revelados aos entrevistados. Podem ser agregadas por procedimentos e técnicas de associação, de complemento, de construção e a expressiva (visual ou verbal).
Escalas de Mensuração ou Medição	Em pesquisa territorial, consiste em atribuir números ou outros símbolos às características de objetos, de acordo com regras pré-definidas, em que não se mede o objeto propriamente dito, mas alguma de suas características. Os procedimentos e técnicas de mensuração e escalonamento é que irão lhe fornecer as orientações para elaborar as perguntas de um questionário. As escalas poderão ser nominais, ordinais, intervalares (ex. Escalas de <i>Likert</i> ) e escalas de razão.
Questionário	É um conjunto formal de perguntas cuja finalidade é obter informações dos entrevistados (MALHOTRA, 2001). Um bom questionário é aquele capaz de coletar os dados necessários para atingir os objetivos específicos da pesquisa. As perguntas devem estar diretamente relacionadas ao propósito do projeto de pesquisa e o questionário poderá ser composto por questões estruturadas e outras semiestruturadas (abertas).

Source: Prepared by the authors, based on aforementioned literature authors

Appendix IV – Técnicas de análise e procedimentos de pesquisa

Técnicas de Análise	Procedimentos
Análise de conteúdo	Considerado como conjunto de procedimentos e técnicas de análise das comunicações visando obter, através de procedimentos sistemáticos e objetivos de descrição do conteúdo das mensagens, indicadores (quantitativos ou não) que permitam inferir conhecimentos relativos às condições de produção/recepção (variáveis inferidas) destas mensagens.
Análise de discurso	O discurso, na análise do discurso, não é apenas transmissão de informação, pois, no funcionamento da linguagem, que põe em relação sujeitos e sentidos afetados pela língua e pela história, temos um complexo processo de constituição desses sujeitos e produção de sentidos.
Historiografia	São procedimentos e métodos usados no estudo de acontecimentos históricos, utilizando-se a análise de documentos, relatos orais e também iconografia de organizações e instituições.
Análise Documental	Consiste no procedimento de operação, ou um conjunto de operações, visando representar o conteúdo de um documento sob uma forma diferente da original, a fim de facilitar, num estado ulterior, a sua consulta e referência.
Matemática e Estatística	O pesquisador percebe a realidade mediante a observação, porém a atividade científica, por vezes, necessita de instrumentos que reforcem as aptidões naturais e permitam mais objetividade das observações. Em muitas situações, essa objetividade está associada à ideia de quantificação, à medida que tal procedimento permite ao pesquisador analisar fenômenos em função da frequência em que ocorrem ou de sua quantidade.

Source: Prepared by the authors, based on Zamberlan et al. (2016)