

APLICAÇÃO DO PAINEL DE INDICADORES DE MONITORAMENTO E AVALIAÇÃO DA CESTA DE BENS E SERVIÇOS TERRITORIAIS¹ APPLICATION OF THE PANEL OF INDICATORS FOR MONITORING AND EVALUATING THE BASKET OF TERRITORIAL GOODS AND SERVICES

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Resumo

A Cesta de Bens e Serviços Territoriais (CBST) é uma abordagem teórico-metodológica utilizada para analisar processos de desenvolvimento territorial sustentável em áreas predominantemente rurais. Originária da França, a CBST busca valorizar produtos e serviços de qualidade, específicos ao território, associado ao fortalecimento do sistema de governança local. Desde 2010, a CBST vem sendo aplicada em diversos territórios brasileiros e, ao longo dos anos, ferramentas de monitoramento e avaliação da abordagem vêm sendo desenvolvidas. Este estudo visa analisar uma das ferramentas, o Painel de Indicadores de monitoramento e implementação da CBST, com um teste de campo na região oeste catarinense, especificamente no território de abrangência da Cooperativa de Crédito Rural Seara (Crediseara). Resultados preliminares destacam a importância do painel na identificação dos componentes da CBST e como potencial ferramenta para auxiliar a formulação de políticas públicas e iniciativas locais.

Palavras-chave: Ferramentas de monitoramento e avaliação. Indicadores territoriais. Perspectiva de atores sociais.

Abstract

The Basket of Territorial Goods and Services (BTGS) is a theoretical-methodological approach used to analyze sustainable territorial development processes in predominantly rural areas. Originating in France, the BTGS seeks to value quality products and services, specific to the territory, associated with strengthening the local governance system. Since 2010, BTGS has been applied in various Brazilian territories and, over the years, tools for monitoring and evaluating the approach have been developed. This study aims to analyze one of these tools, the Panel of Indicators for monitoring and implementing BTGS, with a field test in the western region of Santa Catarina, specifically in the territory covered by the Seara Rural Credit Cooperative (Crediseara). Preliminary results highlight the importance of the panel in identifying the components of the BTGS and as a potential tool to help formulate public policies and local initiatives.

Key words: Monitoring and evaluation tools. Territorial indicators. Social actors' perspective.

1. Introduction

The Basket of Territorial Goods and Services (BTGS) is a theoretical-methodological approach used to analyze sustainable territorial development (STD) in rural areas. BTGS was developed in France during the 1990s and has characteristics geared to the French socio-cultural reality (Mollard, 2001; Pecqueur, 2001). After adaptations to the Brazilian reality, several authors have applied the BTGS concept in regions of Santa Catarina (Capellesso *et al.*, 2022; Cazella *et al.*, 2019; Giombelli *et al.*, 2022b; Tecchio *et al.*, 2020).

The development of a given territory encompasses the combination of social, economic, cultural and environmental advances, with the aim of expanding human freedom and improving quality of life (Sen, 1993). In turn, territory refers to a constructed space where individuals

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collaborate to face common challenges and access resources collaboratively (Cazella *et al.*, 2020; Kato; Delgado; Romano, 2022). Sustainability, based on the principles of eco-development, seeks harmony between socio-economic progress and environmental preservation (Sachs, 1986). In this way, sustainable territorial development involves mobilizing actors to devise strategies for adapting to external challenges in order to reorganize local economies in the face of globalization and sustainability imperatives (Hirczak; Janin; Lapostolle, 2022).

The BTGS approach was initially formulated on the basis of empirical research that explored and organized quality products and services in a given territory. The first empirical case was conducted in the Baronnies region of southern France in the 1990s, treating Nyon olive oil as the territory's main product. In addition to olive oil, products such as wines, essential oils, lavender and rural tourism were also products and services in the basket (Mollard, 2001; Pecqueur, 2001).

The BTGS typology makes it possible to identify the components, absences and potential of each territory. Based on the identification of these factors, researchers have proposed monitoring tools to improve the BTGS approach. Initially, a territorial analysis diagram was proposed to systematically highlight and analyze the components present in the territory (Hirczak; Moalla, 2010). However, due to the subjectivity of evaluation by territorial actors and the lack of specific studies, its application has not been effective (Cazella *et al.*, 2020). In response to these limitations, a panel of indicators was developed to monitor the implementation of BTGS (Turnes *et al.*, 2022).

The panel offers a more detailed and comprehensive analysis of the components, considering the dimensions and descriptors that make up BTGS and then defining the indicators for each descriptor. However, as far as we know, no attempt has been made to apply the panel in the field with social actors in a territory (Turnes *et al.*, 2022). In view of this, this study aimed to apply the monitoring based on the indicator panel in the field in order to contribute to improving the BTGS in the territory covered by the Seara Rural Credit Cooperative (Crediseara).

2. Objective

The main objective of this study was to analyze the panel of indicators as a methodological tool for identifying and evaluating the components of the Basket of Territorial Goods and Services.

3. Methods

The study was conducted in the western region of Santa Catarina, Brazil, in the territory covered by Crediseara, including the municipalities of Seara, Xavantina, Arabutã, Arvoredo, Itá and Paial. This region has a history of occupation that went through phases of indigenous peoples, settlers and family farming, with the ascendancy of European immigrants at the beginning of the 20th century, resulting in the productive base that allowed the development of large agro-industries (Tecchio *et al.*, 2020).

However, some family farmers were excluded from this process, giving rise to social movements in the 1990s seeking sustainable and inclusive development alternatives (Giombelli *et al.*, 2022b). One of these movements resulted in the formation of Crediseara in 1995, through a collective action between civil organizations, academics from the Federal University of Santa Catarina and entities linked to family farming (Giombelli *et al.*, 2022a).

The panel of indicators was reviewed in two meetings with researchers and experts. Metadata sheets were drawn up for each indicator, totaling 37, based on a literature review on STD and BTGS. The field research involved semi-structured interviews with 15 local social

actors, including actors from the private, associative and public sectors. The interviews were conducted based on the panel's indicators, seeking to understand the participants' perspectives. The answers were recorded, transcribed and analyzed using NVIVO software. The territory's BTGS maturity index was calculated from the interviewees' responses, allowing a visual assessment of the territory through a territorial analysis diagram.

4. Preliminary Results

Based on the answers and perspectives of the 15 people interviewed on the 37 indicators related to the governance system, to the supply of public and private goods and services and the landscape of the territory, it was possible to calculate the BTGS maturity index. Based on this value, we identified a diversity of goods and services, we were able to assess the territory's infrastructure from the perspective of the actors, considering issues such as the availability of marketing channels, road conditions, signposting, incentives for innovation, rural tourism and environmental preservation.

The panel allowed us to identify elements of the governance system, both between private and public actors. Based on the responses, we were able to analyze the weaknesses and strengths of the governance system. For example, we identified that the territory has a forum of family farming entities, made up of a variety of private and associative actors linked to family farming, with the aim of promoting sustainable territorial development. However, there are no forums made up of public actors with the same approach, nor are there any forums that include public and private actors together to discuss the issue of STD.

The tool offers local actors the ability to identify priority areas in the territory, ranging from infrastructure issues to governance, public policies and other relevant aspects. In addition, the panel revealed a wide variety of goods and services, highlighting its usefulness in understanding territorial diversity and making it possible to assess the level of cooperation between private actors, as well as the connection between public and private actors. It also made it possible to measure the importance of the territory's natural, historical and cultural resources. On the other hand, there was a clear lack of information on the diversity of traditional communities, on how large-scale agriculture/agro-industry influences the territory and on the relationship between neighboring territories.

With the index values for each dimension, we inserted this data into the Territorial Analysis Diagram, obtaining a visual and situational representation of the territorial development process under the BTGS approach in the territory covered by Crediseara.

It is important to note that some aspects of the research are still in the development phase, and therefore the results presented are preliminary and subject to change as the study concludes.

5. Final Considerations

After the first field test of the indicator panel, the tool's potential to identify the components of BTGS in the territory was evident. The results obtained could have significant implications for the formulation and implementation of public policies, as well as for initiatives by local groups and organizations aimed at promoting sustainable territorial development.

For future research, we suggest increasing the sample size and including a greater diversity of actors, especially if the interest is in analyzing a specific territory. It is recommended that participatory research be carried out, involving formative processes such as focus groups and territorial workshops. In addition, it is important to explore methodologies for using the results together with local actors to develop strategies and actions for the territory.

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