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TERRITORIAL APPROACH TO DEVELOPMENT: A VIEW FROM THE SOCIAL DIMENSION

ABORDAGEM TERRITORIAL DO DESENVOLVIMENTO: UM OLHAR A PARTIR DA DIMENSÃO SOCIAL

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Abstract

The historical processes of socioeconomic and cultural construction and reconstruction in the relationship with the environmental surroundings result in a set of assets and resources, material and immaterial, that accumulate throughout history in a given territory; that is, they refer to the territorial heritage. In these processes, the social dimension becomes important, as it comprises the different relationships that occur within societies and between societies and nature. This article aims at establishing a reflection on the social dimension of territory from a territorial approach to development. The text is organized into sections, in which the epistemological assumptions are explained; the basic components that allow us to understand the social dimension are detailed; and possible procedures for data collection and analysis are presented, which are capable of guiding research that focuses on territorial heritage from the social dimension. We worked with three major components and eighteen variables, from an interdisciplinary, multidimensional, and multiscale approach, which are attentive to the great transformations underway in world societies, but, at the same time, sensitive to the manifestations of different actors and the design of various scenarios.

Keywords: Territorial Development. Territorial heritage. Social dimension.

Resumo

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Os processos históricos de construção e reconstrução socioeconômica e cultural na relação com o entorno ambiental resultam em um conjunto de ativos e recursos, materiais e imateriais, que se acumulam ao longo da história num determinado território, ou seja, se referem ao patrimônio territorial. Nestes processos, a dimensão social adquire importância, pois compreende as diferentes relações que ocorrem nas sociedades e destas com a natureza. Este artigo tem como objetivo estabelecer uma reflexão sobre a dimensão social do território a partir da abordagem territorial do desenvolvimento. O texto está organizado em seções, nas quais são explicitados os pressupostos epistemológicos; detalhados os componentes básicos que nos permitam compreender a dimensão social; e apresentados possíveis procedimentos de coleta e análise dos dados, capazes de orientar pesquisas que tenham como foco o patrimônio territorial a partir da dimensão social. Trabalhou-se com três grandes componentes e dezoito variáveis, a partir de uma abordagem interdisciplinar, multidimensional e multiescalar, atenta às grandes transformações em curso nas sociedades mundiais, mas, ao mesmo tempo, sensível às manifestações dos diferentes atores e ao desenho dos diversos cenários.

Palavras-chave: Desenvolvimento Territorial. Patrimônio territorial. Dimensão social.

Introduction

This article aims at establishing a reflection on the social dimension of territory from a territorial approach to development. It is part of a collective effort of researchers from several Brazilian, Latin American and European universities articulated around the research project "Territorial heritage as a reference in the development process of territories or regions (ProPAT)"⁶, which has been developed since the second half of 2020 and has already established its epistemological, theoretical and methodological assumptions from which it proposes to follow (DALLABRIDA; ROTTA; BÜTTENBENDER, 2021; DALLABRIDA et al., 2021).

Territorial heritage refers to the set of assets and resources, material and immaterial, that have accumulated throughout history in a given territory, resulting from historical processes of socioeconomic and cultural construction and reconstruction in the relationship with the environmental surroundings, represented in its different dimensions (productive, cultural, institutional, natural, social and human-intellectual) (DALLABRIDA, 2020; MAGNAGHI, 2015). Thus, the social dimension is of the utmost importance, as it comprises the different relationships that occur between society and nature.

It should be made clear, at the beginning of this article, that this reflection on the social dimension of the territory does not mean that it can be isolated from the totality, but that it can be scrutinized, with due scientific rigor, in order to understand it better. Understanding the totality is what gives meaning to its multiple dimensions and scales. However, totality cannot be understood without an analytical approach, with the magnifying glass of science, in order to explain its constitutive characteristics. As Edgar Morin (2005, p. 75) states, "I cannot conceive of the whole without the parts, and I cannot conceive of the parts without the whole [...] that what is acquired in the knowledge of the parts turns on the whole" and that "the knowledge of the parts can be enriched by the whole and of the whole by the parts, in the same movement that produces knowledge".

When defining the epistemological, theoretical, and methodological assumptions that guide this research project (DALLABRIDA; ROTTA; BÜTTENBENDER, 2021; DALLABRIDA et al., 2021), the researchers involved indicated the guidelines from which to examine the social dimension. These guidelines come from four epistemic fields: (i) the new systems theory; (ii) complexity theory; (iii) historical and dialectical materialism; (iv) and a decolonial and decentralized Perspective.

The new systems theory indicates that territory can be understood as a set of organized, interdependent, integrated, and complementary components and variables that constitute an autopoietic system, i.e., in a constant process of construction/reconstruction based on the relationships and interactions established among its internal components and between them and their surroundings. This perspective gives the territory a character of an organization and, at the

⁶ At the Federal University of Paraná/Post-graduate program in Sustainable Territorial Development, this theme is being addressed in the project "Territorial heritage as a reference in the development process of territories or regions: epistemic-theoretical assumptions and proposal for a methodological instrument".

same time, of fluidity and permanent reconstruction (DALLABRIDA; ROTTA; BÜTTENBENDER, 2021).

Complexity theory indicates the need to overcome the Cartesian-Newtonian paradigm, which divides and separates, for complex thinking, whose main purpose is to "account for the articulations shattered by the cuts between disciplines, between categories and between knowledge" (MORIN, 1996, p. 177). It means to advance in the search for multidimensional knowledge, which respects the various dimensions of the phenomena (biological, social, cultural, economic, natural...), looking for the interrelationships, interactions, feedbacks..., and opening possibilities for incompleteness, chance, and uncertainty. In Edgar Morin's epistemic perspective, the goal of knowledge is not to provide absolute and complete answers, but to open dialogue (LIMA, 2010). Incorporating this perspective in territorial heritage studies implies working with the principles of anti-reductionism, pluralism, multidimensionality, incompleteness, and uncertainty (DALLABRIDA; ROTTA; BÜTTENBENDER, 2021).

Historical and dialectical materialism considers history as the axis of scientific explanation and understanding and has in social and political action one of the main epistemological categories. "Science is conceived as an unrestricted critical dialogue with a focus on objectivity (principle of the unity of opposites). Social action (praxis) is the fundamental epistemological category, and the dynamic (concrete, historical, praxis) subject-object relationship constitutes the center of cognitive actions" (ARENHART et al., 2021, p. 99). In studies based on this approach, the fundamental investigative procedure consists in identifying the actors, characterizing the scenarios, identifying the interests at stake, making contradictions explicit and pointing out perspectives. This is a fruitful epistemological strand for territorial heritage studies, as it points to the need for a situated and purposively knowledge, guided by the principles of contradiction, historicity, and totality, which are essential in understanding the socioeconomic, cultural, and environmental contexts represented by territories (DALLABRIDA; ROTTA; BÜTTENBENDER, 2021).

The decolonial and decentralized perspective leads us to understand reality beyond the dominant models of science and hegemonic groups in society, bringing out diversity and plurality. According to Boaventura de Sousa Santos (2009), it means incorporating the diversity of the world and the epistemological pluralism that recognize the existence of multiple visions essential for broadening the horizons of worldliness and the recognition of alternative social and political experiences and practices. It is "to prioritize epistemological conceptions that avoid the exclusion and silencing of subjects, with their knowledge and cosmovisions, often denied as legitimate explanations and guides of conduct, whether of minorities or marginalized and/or dispossessed groups" (DALLABRIDA; ROTTA; BÜTTENBENDER, 2021, p. 266).

From these epistemological references that anchor the research project, it is proposed to work with the social dimension from three interconnected components. The first of them is constituted by labor relations and access to goods and services produced in societies. The second, centered on the understanding of the forms of organization and interaction that mark societies. The third is focused on understanding the values, norms, and social structures that "shape" and give consistency to the different societies.

These components will be detailed in the first sections of this article. Once the epistemological assumptions are explained and the basic components that allow us to understand the social dimension are detailed, the final part of the article will propose possible procedures for data collection and analysis, capable of guiding research that focuses on territorial heritage.

Labor Relations and Access to Goods and Services

The present section aims at developing an analytical approach to examine the social dimension in the territorial dynamics of development related to labor relations and access to goods and services. The section is divided into two main parts. In the first part, the theoretical background is developed and explains the main theoretical-analytical concepts of reference for the analysis of labor relations in the territorial dynamics of development. In the second part, five variables are presented as important additional elements for analyzing labor relations and access to goods and services in Brazil.

The capitalist mode of production is based on the private ownership of the means of production, where it is necessary to produce goods to be sold in the market. In this mode of production, labor is a central component. It is through labor that human beings modify raw material extracted from nature to transform it into products. As Marx theorized, each society has labor

relations based on different forms of division, organization, regime and techniques of labor. In capitalism, as is well known, labor relations are relations that occur between two forces; the capitalists who own the means of production, and the workers, those who do not own such means (PATTENDEN, 2016; BAGLIONI, 2018).

In this context, labor relations and access to goods and services (or consumption) have an intrinsic connection and proximity. Durable or non-durable goods and services, as well as the access to such goods, are nothing more than products of labor relations. Labor is necessary to produce, distribute, and trade commodities, but it is also required for workers to earn wages and consume commodities. This involves extensive labor relations both inside and outside of firms, and although such labor relations have an appearance of neutrality, in fact these are marked by contradictory and power relations (SMITH et al., 2018).

On the one hand, in order for capitalists to remain competitive and maximize their profits, they seek to exploit workers as much as possible by paying low wages and intensifying working hours to increase productivity/production. To do this, capitalists use different tools such as outsourcing production (or even outsourcing of outsourcing), contracting informal workers, expanding subcontracting, or practices within companies to increase control over workers, thus increasing productivity. On the other hand, workers seek to reverse this scenario of exploitation, demanding better salaries and working conditions, often through strikes. Thus, labor relations are contradictory and based on exploitative relationships (SMITH et al., 2018).

A problem generated by such contradiction (increase production/productivity versus decrease wages) is that most workers end up having limited and precarious access to consumer goods and services (BRAZIL, 1998). In addition, the capitalist mode of production becomes vulnerable to overproduction crises, since the workers who consume such goods do not have the purchasing power to consume at the same speed as production (HARVEY, 2005). It is worth noting that this contradiction is more aggravating in the global south, also called peripheral countries, due to their historical relations of dependence in relation to the central countries of the global north.

This fact has been aggravated in the last four decades with the intensification of globalization and neoliberal policies. In Latin countries like Brazil, job insecurity, unequal income distribution, and unequal access to goods and services are some of the many problems. In particular, access to goods and services considered vital has often been made impossible by economic policies that refuse to recognize the citizen's basic right to have access to the minimum. Faced with these challenges and realities, this paper analyzes labor relations and access to goods and services in specific territories according to the theoretical approach conceptualized as "local labor control regime" (JONAS, 1996).

As pointed out earlier, labor relations are contradictory. Therefore, at the same time that capitalists seek to maximize their profits by exploiting workers, such capitalists need to maintain certain social levels in local territories so that workers are "pacified" (JONAS, 1996). While capitalists have control of workers within firms' plants, the same cannot be said in the spheres of consumption and reproduction. Therefore, in order to ensure accumulation and stability, capitalists create, within local territories, a "local labor control regime," that is, institutional structures and practices that promote reciprocities between the spheres of production, consumption, and reproduction (JONAS, 1996). A local labor control regime aims at facilitating labor market workers' access to places of production, reproducing productive workers, coordinating wage and consumption norms, and ultimately facilitating capital accumulation. Therefore, a local labor control regime aims at encouraging worker participation according to existing labor relations, but also, to shape and produce workers and insert them into the labor process (JONAS, 1996).

Smith et al.'s (2018) provides an example of this approach. The author's study of the garment manufacturing sector in Moldova demonstrates how the country's neoliberal policies, as well as the state strategy of connecting local garment producers with buyers in Western Europe resulted in a local labor control regime marked by precarious labor relations and lack of access to goods and services. This is because European buyers led such garment producers to adopt a new production structure based on contracts with low prices and short-time pre-established production, which affected workers' labor relations and capacity for social reproduction. Smith et al. (2018) points out that such factories pay minimum wages as the norm, with extra payments as bonuses according to the number of pieces produced by each worker. This leads workers in such companies to live below the poverty line or work multiple shifts to achieve a minimum level of access to goods and services. Another problem is the high number of informal workers, mostly women, who accept such conditions to avoid salary reduction due to taxes.

In this scenario, it is understood that the analysis of the social dimension in the territorial dynamics of development, with regard to labor relations and access to goods and services, needs to have at least five variables as reference: (i) formal work; (ii) informal work; (iii) income distribution among classes or class strata; (iv) human development indicators; and (v) social vulnerability indicators.

As for the first and second variables, which refer to formal and informal work, it is suggested to analyze them together. Secondary quantitative data collection is suggested regarding the significance of the formal and informal sector in a given territory and economic sector. In the case of the formal sector, it is proposed to have reference elements such as: activity, income, working hours, education, and gender. The data on formal employment levels are important to measure the labor conditions of a territory and the type of labor relations existing there. As is known, the rise in unemployment results not only in a growth of informal work, but also in a greater precariousness of labor relations (MATTEI; HEINEN, 2018).

As for the informal sector, attention is drawn to the following categories: informal self-employment; informal workers in formal and informal enterprises but employed by family members; informal workers working in informal or formal enterprises; and formal enterprises employing informal workers to avoid taxation (CHEN, 2012). It is suggested to analyze the informal sector as a result of a process of dispossession - that is, unemployment generated by conjunctural crises that supply the industrial reserve army pointed out by Marx - and of repossession, a process that allows capitalists to reinvest their accumulated capital (MILLAR, 2007).

As previously stated, it is proposed to analyze the informal economy of territory in conjunction with the formal economy. This is because, as Millar (2007) pointed out, in the capitalist system, informal workers are of crucial importance to the formal sector, as they provide goods at extremely low costs so that low-paid formal workers can survive on a minimal income. Thus, both are connected and it is important to analyze them together.

As for the third variable, income distribution among classes or strata of classes, it is suggested to use the Gini Index as a fundamental reference, because it measures the evolution of the degree of income concentration of a country, region or municipality over the years (Gini Index ranges from 0 to 1, the closer to one, the higher the income concentration) (NEVES et al., 2016). Therefore, such an index allows researchers to identify whether the study area has witnessed over the years an increase in income inequality. Such an indicator can be used as an initial step for qualitative research on the possible political and economic actors (or policies) generating such inequality and how this has impacted labor relations, wage relations, and, consequently, access to goods and services. Researchers have shown that municipalities with a lower degree of income concentration usually have a higher level of education and higher wages. Analyses can also be aimed at identifying how income concentration in certain municipalities differentially affects women, migrants, and African descendants (NEVES et al., 2016).

With regard to the fourth variable, human development indicators, it is proposed to use the Municipal Human Development Index (MHDI) as a reference. The Human Development Index (HDI) goes beyond the classic economic dimension to analyze development, comprising three essential dimensions: longevity, education, and income. This index has been used in different places to analyze the degree of development, not only of countries, but also of municipalities. The disparate HDI values among the municipalities of a country or among countries show that the inhabitants have unequal conditions of choices and access to opportunities (BITOUN; MIRANDA; PAIVA, 2005; BAUMANN, 2008). Studies have shown that there is a relationship between HDI and the quality of labor relations and access to goods and services, since one dimension is related to income and the other to education (BAUMANN, 2008). For example, Ghai (2006) shows that, in general, countries with high levels of income per capita also have a high incidence of decent work. That is, the lower the HDI of a country or municipality, the greater the likelihood of precarious labor relations and difficulties in accessing goods and services.

Finally, the last analysis variable of labor relations and access to goods and services proposed is the social vulnerability indicator. This indicator can be measured through the Social Vulnerability Index (SVI). In global south countries such as Brazil, despite the existence of public initiatives aimed at reducing unemployment and precarious labor relations, there is still a high proportion of workers in vulnerable situations (PRONI, 2013). The SVI is an indicator that shows the level of social vulnerability of a place (very low to high social vulnerability, 0-1), and has been used as a way to guide public managers in the design of public policies attuned to the reality of municipalities (IPEA,

2015). The SVI is calculated broadly based on urban infrastructure, human capital, and labor income (IPEA, 2015). For example, the IVS allows researchers and policy makers to identify municipalities and/or territories that are in a vulnerable situation in relation to income and labor and, thus, can discuss territorial development policies, based on the local reality, in order to improve such condition (RAMOS; COSTA, 2018).

Forms of Organization and Interaction

In this section, a comprehensive, open, and plural approach is developed to the social dimension and its importance in the dynamic of territorial development with respect to the forms of organization and interaction at the historical moment in which we find ourselves. This section is divided into two main parts, the first of which not only provides a theoretical narrative but also seeks to account for a historical emergency, namely, the great epistemological and paradigmatic transformation (KUHN, 2021) that the great transitions underway impose on us and impact, precisely, the forms of organization and interaction that act on the territorial dynamics of development. In the second part, six variables are schematically presented as important additional elements to analyze the forms of organization and interaction in Brazil: (i) organized social groups and class strata; (ii) organized social movements; (iii) main networks of relations; (iv) social organizations and institutions; (v) main forms of interaction, cooperation and association; and (vi) main conflicts.

Regarding the first part, it is imperative to register the importance of the context and the historical moment in which we are part. The major transitions that will occur between now and 2050, as a consequence of decarbonization, digitalization, migratory flows and socio-labor intermittency, require a complex approach to the social construction of reality (BERGER; LUCKMANN, 2010). That is, they impose an interdisciplinary attitude that, according to some authors, introduces us to the revolution of the new economy (RIFKIN, 2001) and to a new sociology of knowledge (BERGER; LUCKMANN, 2010).

First, in terms of globalization, three dimensions of analysis appear fundamental: i) the state of the international and multilateral order (critical at the current juncture), ii) the provision of global public goods (there is a serious supply deficit), and iii) regulatory policy (at a difficult moment as observed at COP 26). These three dimensions of analysis have a direct impact on the regulation of socio-economic, socio-cultural and socio-environmental interactions. Second, major transitions increase the complexity and diversity of interactions, i.e., the asymmetric effects, unintended imponderables, paradigmatic shifts, which need to be observed and monitored to prevent negative impacts on the economic, social and environmental cohesion of territories. Third, it is fundamental to avoid the aggravation of social inequality that will be magnified if the first two analytical levels are not properly addressed. In this regard, three instruments are decisive at the territorial level to prevent those effects: local productive arrangements, collaborative networks, and decentralized territorial cooperation (i.e., creating territorial networks) (COVAS; COVAS, 2014a). These instruments act as preventive cushions for social inequality due to their proximity to the origin of social problems. The three dimensions mentioned above - globalization, major transitions, inequality and social polarization - will always be present in the analysis of the six variables described below in the second part of this section.

The first variable, "delimitation of the most disadvantaged social groups", follows the indication of the four most critical inequality planes: large metropolitan areas, small and medium-sized urban communities, rural communities, and communities of traditional peoples (HAESBAERT, 2021). The first task, in each case, is to find the concertation mechanism or social platform that will promote dialogue/negotiation between the parties, and then the public policy measures and solutions best suited to each social group (INNERARITY, 2009).

The second variable seeks to account for the "identification of existing social movements". The great transitions and the challenges they present to society will lead to, besides the already existing social movements, new social movements that had been waiting, starting with non-governmental organizations and other civil society associations. The critical issue of social inequality imposes that these movements build platforms that respond more directly to the new challenges and create, in this way, more and better social capital. Therefore, all existing social movements and organizations should observe the functioning of value chains and local productive arrangements and, through the conversion of territorial heritage into territorial assets, seek to understand how a

network mechanism can link a series of employment/work opportunities and create a new dynamic or territorially-based collective action (DIAS; SILVEIRA, 2007).

The "identification of the main networks of relationships" constitutes the third variable that is important to characterize. In this case, it is necessary to distinguish, on the one hand, the already institutionalized networks of relations, and, on the other hand, the dynamics of social relations that operate at the margins of the social system of each particular territory. On a more theoretical level, these dynamics can follow the following typology: i) simply adjustable or incremental relationships; ii) adaptive relationships; and iii) disruptive relationships. On the other hand, at the level of critical theory, the major transitions of the next decade force us to reconsider social relations, and therefore, whenever possible, an observatory of social innovation should be created with the aim of equating a more complex approach to networks of relations as a result of these major transitions (INNERARITY, 2010).

The fourth variable focuses on the "characterization of social organizations and institutions". From this point of view, climate emergency and sustainable territorial development are inescapable references that must be tested on a practical and operational level. To this end, social organizations and institutions should create collaborative platforms and consultation mechanisms with a view to collecting and processing data, without which their action would be greatly impaired, as well as the effectiveness of the public policy measures that they implement. It is also important to think about the impact of major transitions and the urgent and emergency actions that organizations and institutions should apply.

The "identification of the main forms of interaction, cooperation, and association" constitutes the fifth variable to be analyzed. These forms acquire a special relevance as their connection to public goods and collaborative commons grows (CORIAT, 2015). This means that the privatization of the territory reduces the scope of action of those forms of interaction. To fill this deficit, it becomes imperative to find solutions for interaction, cooperation, and association, through producer and consumer clubs, co-working cooperatives, co-working spaces, startup incubators, environmental and cultural associations, among others. All these organizations can establish networks of innovative relationships supported by technological and digital devices of decentralized cooperation (COVAS, 2021; DALLABRIDA; COVAS; COVAS, 2017; INNERARITY, 2010).

The last variable of this section focuses on the need for the "characterization of the main conflicts" in a territory. Conflicts are part of social dynamics, old and new, as a result of processes of social change and/or transformation. Generally, conflicts can be identified from four main types: i) those of corporate nature, due to conflicts of interests, of classes, class strata, and specific social groups; ii) those that arise due to technological innovation failures (digital illiteracy); iii) those that happen due to public policy gaps; and iv) those that emerge, most likely, by the accumulation of the first three types of conflicts. Moreover, there are additional difficulties that refer to multiscale (territories at different scales of management) and communication difficulties. Finally, the last difficulty concerns the absence of accredited institutions in the arbitration and regulation relations between actors and the system (COHEN, 2018).

It can be mentioned, to close this section, that one of the great challenges facing the social dimension of the territory, according to the territorial approach to development, is the coevolution between climate-ecological justice and social justice. They are the two sides of the same coin and directly influence the model of territorial development. In this context, the forms of organization and interaction depend on how well society is able to mobilize three types of intelligence: rational, emotional, and artificial. To this end, a given territory is not only an object of knowledge (rational intelligence), but also the desired territory (emotional intelligence), capable of mobilizing enthusiasm and adherence to a project for the future. In other words, it is necessary to build a benign and virtuous convergence between digital transition, network society, and intelligent management of the territory in which territorial collective intelligence plays a leading role. The sequence - mission framework, collaborative platform, digital technologies, network economies - together form the concept here called territorial collective intelligence (COVAS, 2021; COVAS; COVAS, 2013a; 2013b; 2014a; 2014b; 2019; COVAS; COVAS; DALLABRIDA, 2019) or simply "territorial intelligence" as per Dallabrida (2020)⁷.

⁷ However, these notions are not identical. The notion of "territorial collective intelligence" is different from the notion of "territorial intelligence". The former is at a higher level of elaboration and construction since it is fundamental to the creation of territorial networks.

Value, Norms, and Social Structures

In this section, some analytical and conceptual elements of human values, based on conflicts, contradictions or socially shared, and how these values are imbricated with norms in the constitution of the social structure are provided. In this sense, in addressing the social dimension, identifying the actors, class interests, contradictions, historical processes, especially understanding the social structure, that is, how society is organized are essential for territorial studies. The section is divided into two parts. The first part discusses the theoretical assumptions of the basic concepts for the analysis of values, norms, and social structures. In the second part, seven complementary and fundamental variables are presented to understand and evaluate Brazilian values, norms, and social structure.

It is worth pointing out that at the core of societies there is a set of values, or "codes of conduct" to which subjects, or social groups, are subordinated. However, in a capitalist society, social relations are marked by various kinds of conflicts, contradictions, and class disputes. These values also play a decisive role in social praxis. Therefore, the hegemony of dominant values (of classes or groups) influences, in a certain way, the population to act in their territories according to their beliefs and interests, especially economic and political ones. Thus, they create an abstract perception of supposedly universal values.

Human values, one of the central themes in social science, gained notoriety with Rokeach's (1979) value system studies, especially since the 1960s. To explain human standards, the author states that subjects, groups, norms, as well as behaviors are often established by universal value orientations. For Rokeach (1979), a value system consists of a hierarchical arrangement of values, categorized over a space of time. In other words, it is an "organized set of preferred norms that are used in selecting objects and actions, resolving conflicts, invoking social sanctions, and responding to needs or claims for social and psychological defenses of choices made" (ROKEACH, 1979, p. 20).

These value systems are divided into terminal and instrumental values. The former refers to desirable end-states of existence, that is, the goals that a subject would like to achieve during their lifetime. However, they can vary among different groups. The instrumental ones refer to preferable modes of behavior of subjects, or groups, in order to achieve the terminal values (ROKEACH, 1979). In this system, the hierarchy of values allows for comparison between subjects and groups (social and cultural), "not only in terms of each of the values, but particularly in terms of axiological priorities" (TAMAYO, 1994, p.7).

In the United States, several studies have been conducted, by sampling, at different historical moments, aiming to compare society's hierarchy of values. According to Tamayo (1994), one of the comparative studies was conducted by the Institute for Social Search at the University of Michigan. When analyzing the results achieved in 1968 with those of 1981, it was observed that the values ranked highest in 1981 were the same as those ranked in 1968, among which were freedom, self-respect, happiness, and wisdom.

More recently, researchers from various places in the world have studied the motivational structure of values, especially Schwartz (1992; 2004), who defined in his theory that human values are organized in a circular model, with "motivational goals," as guiding principles in the life of a human being, or a group. In this model, "the values are represented as points in multidimensional space, in such a way that the distances between them express the empirical relations among the values" (TAMAYO, 1994, p. 8).

In Brazil, Tamayo and Schwartz (1993) identified four characteristic values of the Brazilian culture that interact in the axiological hierarchy, that is, the values peculiar to Brazilians, as important and superior to traditional values. Among the postulated values are cleverness, as a way of overcoming difficulties to get where one wants; dreams, as a positive vision of the future; vanity, as a concern with appearance; and work, as a dignified way of survival. The latter, indicated as one of the supreme values of Brazilians, is justified by the high unemployment rates and the poor working conditions in the country. Finally, the authors also identified that the Brazilian axiological structure is also influenced by gender and the occupation of the subjects (TAMAYO, 1994). In this context, one can assure that human values, vary across time and space, cultures, genders, and social classes, and usually serve as criteria for orientation, preference and evaluation of life in society, that is, of the direction and interaction with the social world.

In this context, values imply a dialectical relationship with norms, which are always a reflection of the values of society. In other words, norms and values always act inseparably to shape the subjects within a group, or in society. In this sense, values, norms, and social structures have a

direct relationship with social reality, which is understood by Berger and Luckmann (1985) as objective and subjective reality, in a dialectical movement, conjugated in three simultaneous moments, exteriorization, interiorization, and objectification. Reality is constructed by a conjunction of social factors arising from human relationships and actions.

The objective reality shows itself in the basic structures of institutionalization and legitimation; that is, institutions presuppose actions of reciprocity, shared, constructed in the historical process and that imply a system of control of human conduct. The subjective reality, on the other hand, deals with the symbolic universe, the process of socialization, primary or secondary. In primary socialization, it is the first socialization that the subject experiences and only then becomes a member of society. The starting point of this process is the internalization that is the basis of the apprehension of fellow human beings, the creation of identity, emotions and "the world as a social reality endowed with meaning". Secondary socialization "is the internalization of institutional 'underworlds'" (BERGER; LUCKMANN, 1985, p. 74).

To analyze the social dimension of the territorial dynamics of development in relation to the values, norms and social structures cited above, it is also appropriate to consider some qualitative variables that are fundamental in all social analysis: (i) main socially shared values; (ii) understanding of normative principles governing conducts; (iii) perception of social and normative structures; (iv) perception of social rights; (v) aspects in which the presence or lack of sharing of certain values favor (or not) social cohesion; (vi) sharing of social values and future prospects; and (vii) social capital.

The first variable prioritizes socially shared values, especially solidarity, cooperation, and hospitality, basic principles in response to the social contradictions of capitalist society. According to Kropotkin (2005, p. 169), the subject does not live alone, feelings and habits that are important for the maintenance of society are elaborated in him. "Without the sociable feelings, without the practices of solidarity, life in common would have been absolutely impossible. These community ties guarantee collective action and organization. However, nowadays, solidarity is a value linked to actions and solidarity forms of participation in organizations, associations, with or without partnership with the state, with the fundamental objective of providing benefits to those subjects in situations of social risks, or the human condition.

Another value, no less important is cooperation, a set of social practices and actions shared between subjects, groups, that stimulate mutual trust. In a territory, the higher the level of trust in relationships, the higher the expectation of cooperation (PUTNAM, 2006). Like cooperation and solidarity, hospitality is also at the center of human relations, focused especially on the exchange and welcoming, and is also manifested in relationships that involve the actions of inviting, receiving, and giving back. In this sense, an analysis that encompasses these sets of values present in social relationships as alternatives to accelerate economic and social development is suggested.

Regarding the understanding of normative principles that govern conducts and the perception of social and normative structures, such as the perception of social rights, it is recommended to analyze: (i) the sets of norms that control social behavior, what is permissible and what cannot be practiced; (ii) the imposition of duties; (iii) limits of action to the subject's conduct, in short, the established sanctions. However, at each normative level, we find norms of conduct and norms of structure, that is, norms aimed at regulating the production of other norms (BOBBIO, 1997). To understand social behavior, in particular perception, it is necessary to analyze the social structure, especially to ascertain the imperative functions, social positions, privileges, and roles or statuses they play, such as prohibitive, imperative, and permissive orders in the territory.

As for the aspects in which the presence or lack of sharing of certain values favors (or not) social cohesion, Coleman (1990), assures that in "groups whose members show reliability and who place ample trust in each other are able to accomplish much more" in comparison to other groups that lack reliability and trust (COLEMAN, 1990, p. 302). In this sense, it is important to evaluate the main social values shared with future prospects, the fundamental actions to overcome the dilemmas or raise the changes in the behavior of the actors in social relations, in the territory and in the valorization of social capital.

In relation to social capital, the points that seem most pertinent to the understanding of social organization are developed, since they involve social relations, junctions, benefits, and confluences. However, the conflicts of interests of individuals, groups, or classes, originating from struggles to maintain or increase the privileged positions occupied in the social structure of the territory, are not denied. Social capital refers to the characteristics of social organization, such as networks of social

relations, norms, and trust that contribute to the effectiveness and facilitate cooperative actions. In this aspect, social capital presents itself as comprehensive and dynamic, since the chains of social relations multiply, notably those of trust and solidarity are large and contribute to the efficiency of society. For Putnam (2006, p. 182), in a complex context, social trust can derive from two related sources, reciprocity and systems of civic participation. The first is related to exchange and social exchange, the second, to systems of civic participation, representing an intense social interaction, which exerts a powerful effect on the territory.

In another strand, Bourdieu, Nogueira, and Catani (2007, p. 67) discuss social capital as "a set of current and or potential resources that are linked to the possession of a durable network of more or less institutionalized relationships of inter-knowledge and inter-recognition. This can be understood under three aspects: (i) the characterized elements, or common properties; (ii) the benefits contracted by subjects in material and symbolic exchanges, in their interaction and participation in groups or social networks and; (iii) the forms of reproduction of social capital. It is understood that certain capital arrangements have differentiated effects on territories, and this is related to the degree of mobilization of the support network that is established. These linking networks can be analyzed as forms of social investment strategies, or the reproduction of social relations in the territory.

Procedures for Data Collection and Analysis from the Perspective of Territorial Heritage Studies

In social sciences, there is an established tradition in the sense that scientists, when proposing research, are aware that their object is historical and, for being historical, is in the condition of "being" and not "to be". Thus, scientists' work moves in the direction of proposing a set of procedures capable of enabling the approximation of the object and the comprehension of its manifestations, even knowing the impossibility of apprehending it in its totality. This approximation is not done without an epistemological and even gnosiological reference, aspects already exposed in the introduction and in the previous section of this text. The mission, now, is to indicate a set of procedures that can be a reference for the approximation of this historical object that is the territorial heritage in order to capture its manifestations, or founding characteristics, in its social dimension. The next step is to propose techniques of analysis that enable a critical and propositional reading of the whole.

In interdisciplinary research proposals, the most indicated path, according to Dallabrida et al (2021, p. 65), based on the proposition of Minayo (2014), is the "triangulation of methods", keeping in mind "a shared frame of reference", which guides the search for essential data to capture the manifestations of the object. The triangulation of methods means adopting a stance of dialogue and working with different instruments, without, a priori, ruling out any possibility in the name of excluding options. The framework of concepts that indicate the path of the investigation was already explained in the first section of this article when the three axes of the social dimension and their constituent variables were presented.

From this perspective, it is understood that, to capture the manifestations of the social dimension of the territory in research on territorial heritage, a set of data collection procedures can be proposed, without excluding others that may become important in the course of research. As a first step, we propose the collection of secondary data, available in public and private environments (databases, official sites, institutes, among others), consolidated indicators in the academic scenario (Gini Index, HDI, MHDI, SVI, among others), documents, scientific productions, official information, among others. This is the moment to constitute the "state of the art of the object", that is, to map the characteristics already identified and be able to gather them into a set of elements that can be worked on and analyzed.

This "state of the art" of the object, obtained through secondary data, needs to go through a process of comparison with the reality experienced in the territory to be researched in order to prevent instrumental rationality from completely supplanting the world of life (HABERMAS, 1987). For this moment, we propose the use of techniques that allow this contact with the world of daily life, such as on-site visits, fieldwork, records of daily life, semi-structured interviews, among others. This is a moment in which, according to Roberto Cardoso de Oliveira (2000), the researcher "looks" and "listens", even before "writing".

After mapping the "state of the art" and listening to and looking at the world of everyday life, one can move forward in the process towards identifying aspects that lack information to enable the construction of the defined conceptual map, or that one perceives the need to hear more voices, identify actors, understand processes, and understand relationships. To operationalize this challenge one can resort to the application of questionnaires (with open or closed questions, depending on the information one wants to capture), seminars with focus groups, semi-structured interviews, among other procedures.

In order to organize, systematize, and analyze the material collected, we propose to work with in-depth hermeneutics. The theoretical-methodological referential proposed by John Thompson (1995) presents a "methodological opening", including complementary and inter-articulated forms and procedures, which allow the researcher to "analyze the social-historical and space-time context that surrounds the researched phenomenon", allowing "discursive, content, semiotic analyses or any formal pattern that may be necessary" (VERONESE; GUARESCHI, 2006, p. 87). "The socio-historical world is not just an object-field that is there to be observed; it is also a subject-field that is constructed [...]" (THOMPSON, 1995, p. 359).

The referential proposed by Thompson indicates a preliminary moment ("interpretation of doxa") and three phases in the operationalization process of depth hermeneutics: "socio-historical analysis", "formal or discursive analysis" and "interpretation/reinterpretation". However, he makes it clear that these are not sequential phases, but articulated and understood in the whole research process. They must be organized based on the research needs and the critical and creative spirit of the researcher (VERONESE; GUARESCHI, 2006).

The "interpretation of doxa" is the moment in which the researcher or the research group seeks to identify the set of beliefs, opinions, views, perceptions, and understandings that are present in the social environment in which the research is conducted. It is a careful description of what one wants to study; a "careful evaluation of how the subjects understand their daily reality" (VERONESE; GUARESCHI, 2006, p. 88). This level of preliminary analysis aims to avoid the readings made by researchers being disconnected from the social contexts in which they are produced.

The "socio-historical analysis" is the moment to "reconstruct the social and historical conditions of production, circulation and reception of symbolic forms" (THOMPSON, 1995, p. 366). It presupposes understanding that symbolic forms are created and circulate in particular social, spatial, and temporal contexts that need to be grasped and understood by researchers. To this end, Thompson proposes special attention to "spatio-temporal situations" (conditions of space and historical periods in which symbolic forms were structured, put into circulation, and perceived by people), "fields of interaction" (spaces of positions and trajectories, as well as social capital available to people, groups, and institutions), "social institutions" (set of rules, norms, resources, and relatively stable relationships that shape social dynamics), the "social structure" (more or less stable asymmetries and differences in the distribution of power, resources, and opportunities, as well as the criteria, categories, and principles that underpin them), and the "technical means of message construction and transmission" (the material substrate through which symbolic forms are produced and transmitted).

The "formal or discursive analysis" is the second phase of depth hermeneutics. In this, the focus turns to understand the "structures by which symbolic forms are composed and organized in messages, and how they mobilize meanings" (NAZÁRIO; REINO; MANFREDINI, 2016, p. 294), discussing their patterns and their relations, in reference to the socio-historical context. It is necessary to keep in mind that this is an articulated double movement: the analysis of the internal constitutive elements of the symbolic forms and the relationship with the conditions of their production, their socio-historical context (VERONESE; GUARESCHI, 2006).

The third phase of depth hermeneutics is constituted by the "interpretation/reinterpretation". From the material collected, organized and systematized in the previous stages one now sets out for the production of possible syntheses, integrating the content of the symbolic forms to the analysis of the context of their production. "It is an interpretative, plausible and well-founded explanation - hence the need for a consistent theoretical reference - of the investigated phenomenon". (VERONESE; GUARESCHI, 2006, p. 89).

Chart 1 summarizes the methodological proposal presented for the study of the social dimension of the territory in research on Territorial Heritage.

Chart 1: Methodological proposal for the study of the social dimension of the territory in research on Territorial Heritage

Social Dimension			
Components	Variables	Instruments of data collection	Techniques for interpretation
Labor relations and access to goods and services	Formal job	- General Registration for Employed and Unemployed (CAGED); - Gini index; - HDI and HDMI; - SVI; - On-site visits, - Interviews; - Questionnaires;	Hermeneutics of Depth:
	Informal job		
	Wealth distribution among classes or class strata		
	Index of human development		
	Index of social vulnerability		
Forms of organization and interaction	Organized social groups and class strata	- On-site visits; - Fieldwork; - Records of daily life; - Semi-structured interviews - Questionnaires - Seminars with focus groups;	- Interpretation of doxa (preliminary stage) a) Socio-historical analysis; b) Formal analysis or discursive analysis; c) Interpretation/ Reinterpretation
	Social movements		
	Network relations		
	Organization and social institutions		
	Forms of interaction, cooperation and association		
	Main conflicts		
Values, norms and social structures	Main social shared values	- On-site visits; - Fieldwork; - Records of daily life; - Semi-structured interviews - Questionnaires - Seminars with focus groups;	b) Formal analysis or discursive analysis; c) Interpretation/ Reinterpretation
	Understanding of the normative principles that govern conducts		
	Perception of social and normative structures by the population:		
	Perception of social rights by the population		
	Aspects in which the presence or lack of sharing of certain values favor (or not) social cohesion		
	Need in terms of sharing social values and future prospects		
	Social capital		

Source: Organized by the authors.

The three essential components of the social dimension can be made explicit in the detailing of their respective variables, captured from multiple instruments of data collection, organized, systematized and interpreted from the hermeneutics of depth. This is an epistemic-theoretical-methodological proposal for the study of the social dimension, which needs, as already mentioned in the scope of this article, to be discussed in relation to the other dimensions of the territory, in the context of the proposed research project and the team of researchers involved.

Conclusion

This article sought to establish a reflection on the social dimension of territory, delimiting a possible understanding of it, pointing out its components and variables, as well as proposing data collection and analysis procedures capable of guiding research about it. It is clear that the reflection on the social dimension of the territory does not mean that it can be isolated from the totality, but that it must be scrutinized, with due scientific rigor, in order to better understand it. Understanding the totality is what gives meaning to its multiple dimensions and scales. However, the totality cannot be understood without an analytical look, with the instruments of science, in order to explain its constitutive characteristics.

It is understood that the social dimension of a given territory can be understood from three major analytical components, articulated among themselves: (i) the labor relations and access to goods and services; (ii) the forms of organization and interaction; and (iii) the values, norms, and social structures that constitute it and give it consistency. The capitalist mode of production is based on private ownership of the means of production, on labor as the main source of wealth production, and the market as the essential locus of circulation, access, and consumption of the goods and services produced. It is through labor that human beings modify the raw materials extracted from nature to transform them into products that are placed on the market.

In this context, labor relations and access to goods and services (or consumption) have an intrinsic connection and proximity, are marked by intense contradictions, and present themselves in different ways in different territories. To study them, we propose working with at least five variables: (i) formal jobs; (ii) informal jobs; (iii) income distribution among classes or class strata; (iv) human development indicators; and (v) social vulnerability indicators.

In a scenario of globalization, major transitions, enormous inequalities, and accentuated social polarization, understanding the forms of organization and interaction present in a given territory requires a new sociology of knowledge and an interdisciplinary approach that is attentive to at least six essential variables: (i) the organized social groups and class strata; (ii) the organized social movements; (iii) the main networks of relations; (iv) the social organizations and institutions; (v) the main forms of interaction, cooperation, and association; and (vi) the main conflicts.

When it comes to looking at the values, norms, and social structures, one has in mind the need to identify the actors, the class interests, the contradictions, the historical processes, and, especially, to understand how society is organized in the territory. In capitalist societies, values play a decisive role in social praxis; the hegemony of dominant values (of classes or groups) influences the population to act in the territories according to beliefs and interests, especially economic and political ones; and, in a certain way, an abstract perception of supposedly universal values is created. To understand this scenario, special attention to seven essential variables is proposed: (i) main socially shared values; (ii) understanding of the normative principles that govern conducts; (iii) perception of social and normative structures; (iv) perception of social rights; (v) aspects in which the presence or lack of sharing of certain values favor (or not) social cohesion; (vi) sharing of social values and future prospects; and (vii) social capital.

The reflection on the social dimension of the territories, in studies focused on territorial heritage, established in this text, has highlighted the need to work with three major components and eighteen variables, from an interdisciplinary, multidimensional and multiscale approach, which is attentive to the major transformations underway in world societies, but, at the same time, maintain sensitivity to perceive the manifestations of the different actors and the design of the various scenarios. For this to be possible, the epistemological, theoretical and methodological posture requires special attention from researchers who need to "go into the field" armed with adequate tools, capable of being constantly reconstructed in the interaction with reality. This is a challenge.

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