Towards a community of resource sites for territories and transition

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The CITEGO association, Cités-Territoires-Gouvernance, creates, maintains and develops a knowledge pool at the service of players - local authorities, civil society organisations, experts and researchers - who share the conviction that territories will have to play a major role in the transition to sustainable societies.

This common resource is based on everyone's experience and is available to all. It is a unique response to the systemic challenges of this transition.

Pierre Calame, Chairman of CITEGO. *After a long career as a civil servant from 1968 to 1988, as a civil engineer, then as head of an international foundation, the Charles Léopold Mayer Foundation for the Progress of Humankind from 1988 to 2014, in 2015 I set up the Citego association, www.citego.org, which I have chaired since its inception. At Jean François Caron's request, I also chaired the Fabrique des transitions when it was being launched, until last year. My dual national and international career has given me a number of convictions, most of which are set out in a series of books spanning the period from 1968 to 2023. The two most recent of these provide an overview: the Manifesto "Osons les territoires" published in September 2022 by Editions du Pommier and the "Petit traité de gouvernance" published in March 2023 by ECLM.*

Pierre Calame, 19 September 2023

The role of territories in the transition: a historical perspective

Many regions and networks of regions are engaged in the transition to sustainable societies. This effort must be seen in a global perspective, as part of the battle to bring about a genuine metamorphosis in our society.

What is it all about? It'*s about the ability of local and regional authorities, as collective players, to think and act in an interdependent world*. This is one of the major challenges of our time.

We've come a long way. Remember the slogan of the first Earth Summit in 1992: "Think globally, act locally". It assigned to the territories, to the local level, the task of implementing thinking and policies that had been developed elsewhere. And this idea is still dominant in France, where the State, through its public policies and agencies, defines policies that local authorities are asked to follow and implement. As for the idea of the collective actor, this is still very far removed from French thinking, which overemphasises the role of institutions. A collective player? Unknown to many. But that's what it's all about: the ability of the various players in a region - public, private and civil society players - to work together to build a collective strategy over the long term, in tune with the major challenges of our time.

Why is the ability of local players to establish themselves as collective players capable of thinking and acting both locally and globally a major issue of our time? Because we are facing multiple crises, all of which are crises of relationships, and we are unable to respond to these crises within the conceptual and institutional framework inherited from the past.

This framework is what we, along with the "Osons les territoires" collective, have called *the first modernity:* that which was built between the sixteenth and eighteenth centuries. Its undeniable operational effectiveness is based on separation: separation between thinking and acting, separation between disciplines of knowledge, separation between players, separation between the different levels of governance, and last but not least separation between humanity and the biosphere. And that's what we need to overcome.

Albert Einstein said: "Let us not hope to solve a problem with the hypotheses that gave rise to it": let us not imagine solving these crises in relations with the conceptual and institutional system that gave rise to them. We need to embark on a metamorphosis, to move from the first modernity to the second modernity: *a modernity capable of organising and managing relationships of all kinds.*

This metamorphosis is not easy. The past resists, resists and still resists, for three reasons that are important to bear in mind.

- Firstly, because in a society, the inertia of systems of thought and institutions is not just a defect. Societies need stability, and the State in France is the embodiment of that stability. But there comes a time when realities have changed so much that this inertia becomes an obstacle. And that's when we need to embark on a profound transformation of our conceptual and institutional systems.

- The second difficulty is that, over time, conceptual and institutional systems give rise to social bodies interested in maintaining the old order from which they derive their substance. As a result, these bodies constitute formidable resistance to change.

- And then, the third difficulty, as the philosopher Heidegger put it: *the most difficult thing in life is to see through our glasses, because we see the world through our glasses, in* other words through our systems of thought. What we learnt at school comes from the old order, they are 'truths' that we take for granted, and it is particularly difficult to question them.

But today, the lake is on fire! We can't stay with the status quo. Hence the importance of the compass of the second modernity. The players who will embody it are those who are best able to organise and think about the relationships between the economic, ecological and social spheres, or between the players themselves. The territories are part of this. This is what I have called *the revenge of the territories:* local territories, the 'good towns' of the age of royalty, saw their role diminish over the course of the two centuries of the industrial revolution to the benefit of the States and big business, to the point where today they are no more than second-rate political and economic players, assigned to implement policies defined outside them; but today, as spaces par excellence for building relationships, *they have a vocation to once again become one of the pivotal players in the society we are building*. But if they are to live up to this new role, they themselves must undergo radical change. It's not so easy to move from the shadows into the light. They need to be able to think systemically, to create habits of cooperation between public and private players, habits that constitute *the intangible capital of the territories*, the most precious of assets.

A knowledge commons: sharing experience

Territories are still being asked to implement policies defined above their heads by the State. These policies do not ignore local innovations, but they use them as tools, by making them part of the classic scheme for the dissemination of innovation by the State, which consists of stimulating or identifying local innovations, and then generalising them by transforming them into uniform directives.

This approach is part of a broader, top-down concept of knowledge that is still embodied in schools today: the dissemination of timeless, universal "fundamental knowledge" embodies authority. The word authority comes from the Latin auctoritas: the word that carries weight because of who carries it and who is legitimate to carry it, the State on the one hand and the expert on the other. This makes local, circumstantial knowledge, rooted in experience, "second-rate" knowledge, with no value until it is transformed by the State and scientific institutions into universal knowledge.

On the contrary, the new role of the territories presupposes a major break in the source of knowledge: *from the top-down authority of the State and experts to knowledge built together and resulting from the action itself.* This is what learning communities and the capitalisation of experience are all about.

Knowledge, a common resource arising from the exchange of experience

Capitalising on experience" means transforming the sum of experiences, each of which is localised and circumstantial, into knowledge with a broader scope. It is developed through a *cycle of mediation from action to action*, which starts with the action itself and feeds back into the action the general lessons learned from comparing similar actions. This cycle comprises four stages.

The first step is to *transform the experience into something that can be passed on to others*. Experience shows that it is very difficult for a player who is fully committed to his action to identify the essential features and the main lessons for others. This is the role of the midwife or midwife, in a role not dissimilar to that of the journalist or sociologist, who listens to the players and draws out the main lessons.

The second stage involves pooling similar experiences to create a genuine "knowledge commons": a commons in the sense given to it by Elinor Ostrom: a community for sharing experience, a sum of these experiences for the benefit of all, and rules of governance to ensure that everyone makes their contribution.

The third step is to learn from experience together, by moving away from the silo approaches that are still so dominant in our thinking and giving them a systemic dimension.

The fourth step is to make it a real training subject, a new skill to be acquired by starting from the general lessons that have been learned, with the possibility, each time, of returning to the concrete examples that embody them, precisely as a way of staying connected to reality.

To set up a mediation cycle of this kind, three types of players are needed: firstly, people with experience, rooted in the local area and, if possible, brought together in a network; secondly, midwives and midwives, a role that could become one of the skills to be acquired in local development master's degrees or even journalism schools; thirdly, Citego, which provides the other two with tools and methods.

Obstacles to building this common ground

The creation of Citego stems from the conviction that there is a need to create a pool of knowledge on territories in transition, by pooling experiences from wherever they come, in order to cover the vast spectrum of territorial governance issues as effectively as possible. But this pooling, while necessarily obvious in principle, comes up against many obstacles and resistance, which Citego has endeavoured to overcome over the years.

First of all, the vast majority of networks and organisations - state agencies, networks of local authorities, civil society movements - do a *poor job of documenting their actions*. State agencies prefer to publish guides or assert their expertise rather than describe how this expertise has been applied in different contexts. Networks of local authorities and civil society movements, for their part, often confine themselves to advocacy without reference to the real scope and limits of their action. Finally, there is little sharing of experience between them. To their credit, most local authority or civil society networks, funded by medium-term "projects", are unable to structure their own resources over the long term. In the absence of rigorous collective work to capitalise on experience, there is a constant risk of either reinventing hot water or getting into the same dead ends.

Citego has had to show a great deal of patience and persistence to patiently collect experiences from over sixty sources of information and arrive at a trilingual experience bank, which now contains several thousand case files. The indexing tool used to present and compare the experiences also had to reflect the systemic nature of the transition, and this was achieved with the creation of *the relational atlas.*

A Community of Resources for Territories and Transition, Coretet

Moving from a single site to a community of resource sites

The challenge: to collectively create a pool of knowledge on territories and transition

Until now, Citego's compilation of experiences, analyses and proposals from a wide range of information sources has made it possible to build the knowledge commons. The limitation is that the various networks from which this information originates play a passive role, and are enhanced by their identification in Citego, but do not play an active part in building this knowledge commons.

The answer: a community of resource sites

To reconcile the legitimate desire of each organisation or network to retain its identity with the creation of a knowledge commons at the service of all, we need, as with any commons: a community; a common good to be created and developed; and rules of governance to enable this common good to be maintained.

There are three rules:

- *collect and capitalise on experience and knowledge* within each network and organisation;

- *adopt a common format for presenting experiences* to create a "knowledge pool" produced by all and serving everyone

- *use a common thesaurus of keywords* to index these experiences, reflecting the systemic nature of the transition: the relational atlas

Citego's role in creating and developing the community of resource sites

Citego will play a dual role in the governance of this community of resource sites:

- *lead the community* by acting as the technical body providing the necessary tools and methods and ensuring that each of its members complies with the three disciplines set out above, thanks to an annual subscription from each member of the community;

- *support members* who so wish by helping them to implement these disciplines:

- structuring each member's document base;
- training or support in reporting experiences;
- training or support for indexing using relational atlases.

Annual meeting of the community of resource sites

It will enable :

- measure the progress made and agree on priority developments for the coming year;
- jointly define one or more themes for further study, based on a collective assessment of experiences, likely to culminate in a joint seminar and publication and, why not, in training modules.

Targets, uses and functions of CORETET

The added value imperative

For an organisation or network, collecting the concrete experiences of its members, putting them together, indexing them and making them public, and doing so over time, represents a significant effort. It is only natural to ask whether this effort is worthwhile and, in particular, whether the website presenting these experiences will actually be consulted and by whom. In short, is it worth the effort? Will it add real value? These questions are all the more legitimate given that a website is aimed at a wide range of audiences, from members of the organisation or network to the general public, and their expectations are both diverse and poorly understood.

In addition, a community of resources on territories and transition presupposes that each of its members respects a certain number of requirements for the presentation and indexing of documents, requirements which must in return demonstrate their added value. The number of visits to the CORETET site of the resource community or to the sites of its members is, however, only *one of the ways in which this effort can be valued*.

To try and answer these legitimate questions, let's proceed in two stages: firstly, by looking at the uses and functions of the current Citego site; secondly, by examining how the transition from a single site to a community of resource sites will make it possible to amplify what Citego already provides and develop new functions.

Citego, a much-visited site and much more.

Most visits to the Citego experience bank are made by Internet users who arrive at the site via a search engine. Only a small minority enter via the site's home page. A visit from a search engine such as Google presupposes that Citego is well referenced. We know that visitors rarely go beyond the second or third page of a Google search, and at most the fifth, unless they know exactly what they want to find. A site's ranking on Google depends both on the number of visits it receives and the frequency with which it evolves.

The first function is to raise the profile of all our experiences. Today, Citego receives more than 200,000 visits a year, which is a considerable number for a website specialising in territories and their governance, which has no institutional support for its visibility. This success is due to two factors: firstly, the richness of the experience bank, with over 3,500 fact sheets in French, English or Spanish, each constituting a specific web page; and secondly, the diversity of Citego's information sources, which means that the site 'moves' quickly, incorporating new fact sheets every week. The number of pages, the wide range of subjects covered, the frequency of updates and rigorous indexing are the secret of this success.

The second function is to highlight a number of concepts that are important to us. Here too, the results are quite remarkable. On many subjects, a Citego entry appears in the first five pages of a Google search. In some cases, Citego has even become a benchmark. Two examples: when you search for the term "multi-level governance", Citego comes in second place, just behind Wikipedia. And if you search for the term "capitalisation of experience" and consult Wikipedia to find out what it means, you come up with the "mediation cycle from action to action" taken from the Citego site.

The third function is the development of distance learning courses, which both enhance and enrich the experience bank. Until covid put an end to it, Citego developed a rich experience of cooperation with the Centre national de formation des personnels territoriaux, CNFPT, which affects one of the major targets of reflection on territories and transition: local civil servants. Four distance learning courses have been designed with the CNFPT: territorial governance; complementary currencies; participatory democracy; territorial agri-food systems. Each of these distance learning courses has been used in several sessions, attracting several thousand participants and providing an opportunity to build on the experience already available on the website and to add new experience. In fact, each of these sessions resulted in an influx of visitors.

Fourth function: promoting the systemic approach and thematic summaries. Because of Citego's determination, from the outset, to cover the vast semantic field to which the notions of "territory", "city" or "territorial governance" refer, the experience bank has a significant set of case studies or analyses on a large number of subjects. The indexing of all these files by the relational atlas makes it possible to discover the multiple dimensions of an issue. Hence the interest, already illustrated by several themes, such as "the social economy and solidarity" or "landscapes", of *summary files that* bring out the different dimensions of an issue

without getting bogged down in abstract considerations, because *each of these dimensions **is**, by definition, illustrated by case studies**.**

The move from a single resource site to a community of resource sites will considerably increase the added value already seen with Citego.

This will firstly be the case for the number of visits. The pooling on CORETET of all the files from its various members means that the site will evolve daily and multiply the number of web documents, ensuring high visibility for search engines. An added benefit: even if each organisation or network that is a member of the community experiences major fluctuations in feeding its own database, the fact that the community has more than a dozen members will smooth out these fluctuations, thereby maintaining search engine rankings.

The fact that each data sheet appears both on the site of the member of the community who produced it and on the CORETET site, which pools it, will also mean that Internet users can continue to consult a data sheet either by browsing through CORETET, facilitated by the relational atlas which guides Internet users to the subjects that interest them, or on the site of the member of the community who produced it, thus increasing its visibility.

The use of a corpus of files on a given subject, already a very significant added value of the Citego site, could in the same way be done either within the site of one of the members, if they wish to draw their own lessons from the experience, or collectively with the whole of the CORETET corpus. In both cases, it will be a way of moving away from a purely thematic approach and grasping the different dimensions of the subject.
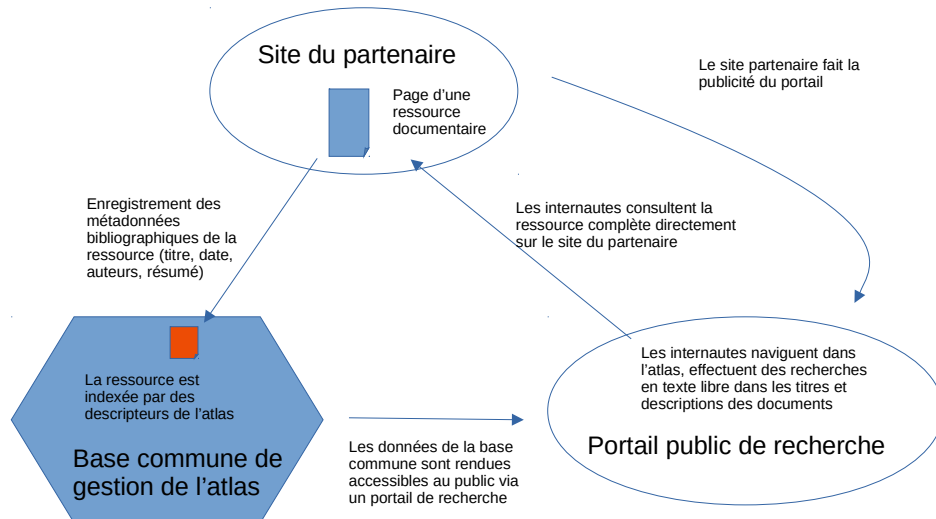
When we want to *transform the wealth of experience into a certain number of guiding principles for future action,* in accordance with the philosophy of multi-level governance, this work can be done collegially by all the members of the community interested in the subject. This pooling of resources from networks of local authorities, the State, the research community and civil society will be particularly attractive for the *joint development of training courses* aimed at local civil servants, State departments, elected representatives, civil society and even students, particularly those on Masters degrees focusing on local development and the ecological transition, who will find it both a source of food for thought and an opportunity to learn about the methodology of gathering and capitalising on experience.

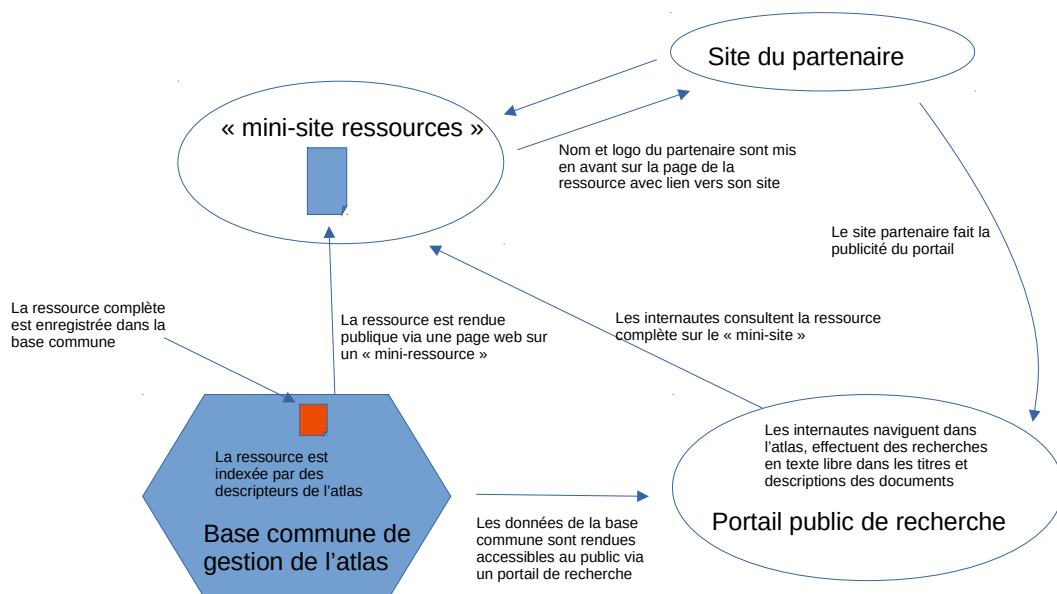# The CORETET technical system: enhancing the value of the community; enhancing the value of each member

Diagram of how a community of resource sites works
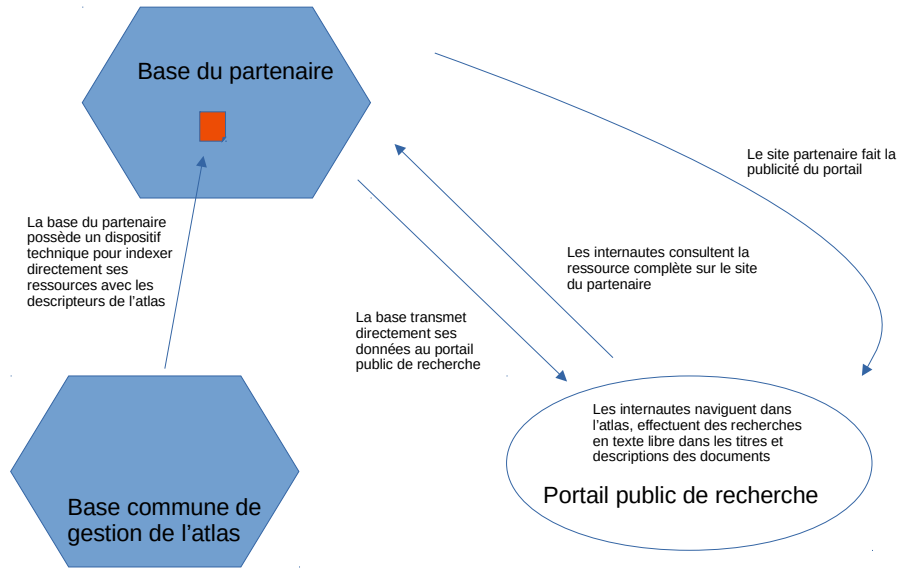
3 possible and complementary cases.

Cas 1 : le partenaire dispose de ressources sur son site

Site du partenaire

Page d'une ressource documentaire

Le site partenaire fait la publicité du portail

Enregistrement des métadonnées bibliographiques de la ressource (titre, date, auteurs, résumé)

Les internautes consultent la ressource complète directement sur le site du partenaire

La ressource est indexée par des descripteurs de l'atlas

Base commune de gestion de l'atlas

Les internautes naviguent dans l'atlas, effectuent des recherches en texte libre dans les titres et descriptions des documents

Les données de la base commune sont rendues accessibles au public via un portail de recherche

Portail public de recherche

Cas 2 : le partenaire ne dispose pas de ressources structurées en ligne

Site du partenaire

« mini-site ressources »

Nom et logo du partenaire sont mis en avant sur la page de la ressource avec lien vers son site

Le site partenaire fait la publicité du portail

La ressource complète est enregistrée dans la base commune

La ressource est rendue publique via une page web sur un « mini-ressource »

Les internautes consultent la ressource complète sur le « mini-site »

La ressource est indexée par des descripteurs de l'atlas

Base commune de gestion de l'atlas

Les données de la base commune sont rendues accessibles au public via un portail de recherche

Les internautes naviguent dans l'atlas, effectuent des recherches en texte libre dans les titres et descriptions des documents

Portail public de recherche

Cas 3 : le partenaire intègre l'atlas relationnel directement dans sa base de données (cas de Citego)

Example of a record indexed with the relational atlas linking to the partner's site:
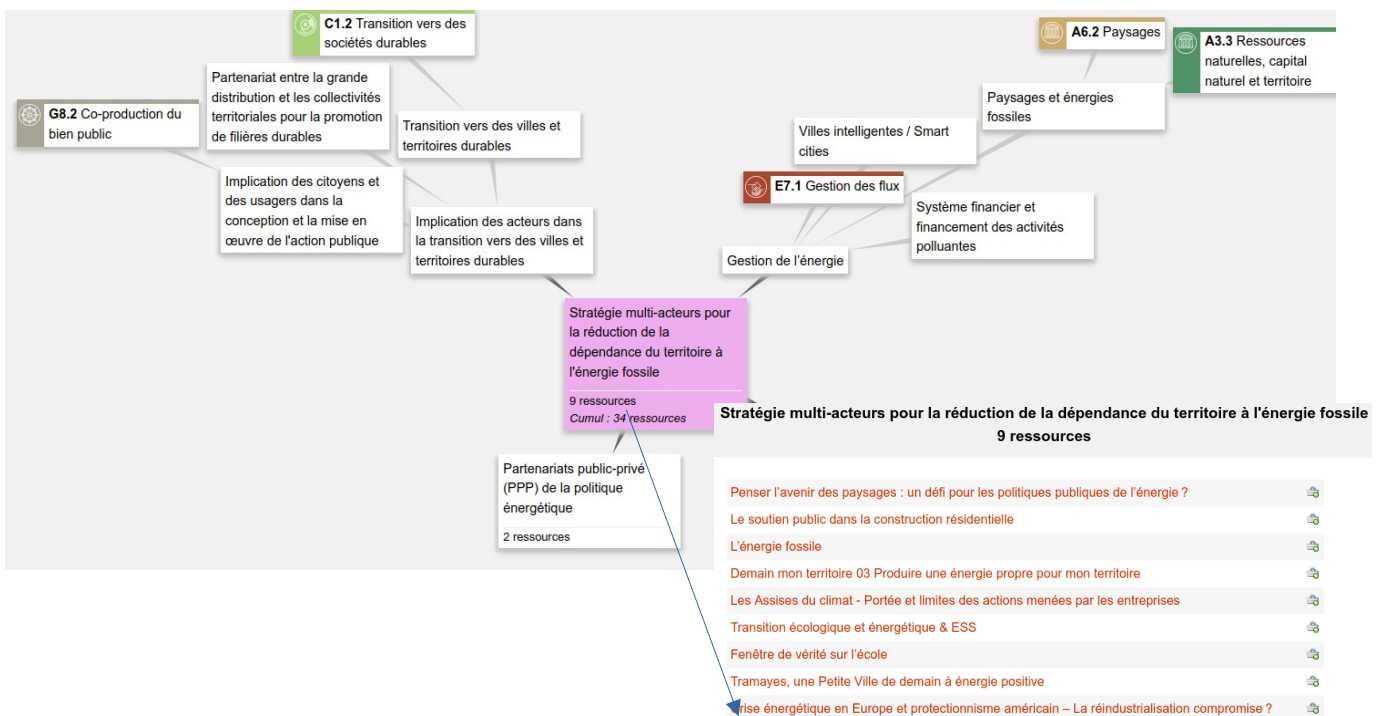
 Europe's energy crisis and US protectionism - Re-industrialisation in jeopardy?

The diversity of CORETET members

In a knowledge community, the conditions for sharing are met thanks to the rules for presenting experiences and indexing them using a common tool, the relational atlas. Once these conditions have been met, the more diverse the members of the community, the greater the interest of CORETET will be, because territorial transition is an issue on every continent and mobilises many different players. Citego is already trilingual - French, English and Spanish - and CORETE will be too.

In building the community, we are counting on a snowball effect from a core group. The contacts that have already been made suggest a possible typology of future members:

1. International networks of local authorities or management of local public services

2. European networks of cities and regions, urban research or civil society

3. National networks of local authorities

4. State agencies and government initiatives

5. Regional networks of territories

6. Universities, training centres, networks of researchers

7. Companies and company networks

8. Civil society networks

9. Networks focusing on developing countries

10. Expert and thematic networks

11. Foundations

The relational atlas, an exceptional tool for systemic transition

A lattice atlas to illustrate relationships

The relational atlas is a unique systemic indexing tool. It is based on the observation that the indexing thesauri currently in use are inspired by the old library classifications: "tree" thesauri broken down into ever finer chapters, paragraphs and sub-paragraphs. However, the nature of a complex system is that the relationships between questions are essential, so a "lattice" thesaurus showing all these relationships is needed. The difficult question is not to imagine a latticework thesaurus where everything intersects with everything, but to identify the relationships that correspond to a concrete reality.

An approach reminiscent of the role of the Mendeleev table in chemistry

The best parallel is chemistry. The "Mendeleyev table" contains all the simple elements, ordered by ascending atomic number and organised according to their electronic configuration, which underlies their chemical properties. Hence their presentation in *matrix* form. *All chemical compounds, even the most complex, are combinations of these elements,* but not all combinations exist in nature. Chemistry is precisely the art of discovering those that can actually exist and of creating those that do not exist in nature.

The relational atlas is based on the same principles: it *starts with* a hundred or so basic descriptors, known as "first-order descriptors", the list and function of which are comparable to those of simple chemical elements, and *by combining them constructs increasingly* detailed descriptors, designating increasingly precise realities, but *retaining only those descriptors that have a meaning "in reality".*

Theoretical atlas and atlas available for public consultation

We began by building a 'theoretical' atlas by identifying the questions that might arise, and linking together some 4,000 descriptors. However, this does not mean that these questions have already appeared in the corpus of files available to us. That's why only those descriptors that have been used to index at least one file in the experience database are listed on the Citego public site, so that they correspond to situations that have already been encountered. This ensures that no search using the descriptors in the atlas will be fruitless.

Matrix construction of first-order descriptors

The relevance of the atlas as a whole depends on the choice of first-order descriptors, the equivalent of the simple elements in the Mendeleev table, which will form the basis of the atlas capable of describing the different facets of territories, cities and their governance. The solution was found only after much trial and error, and it is surprisingly close to the matrix solution found for chemistry!

The founding *matrix of the* atlas, which will generate the list of first-order descriptors, is defined by 9 rows, "the elements that make up an area", and 9 columns, "the points of view on an area":

| The elements that make up a territory	Views of an area
1. society and territory	A. the components of the area (to be described for each line)
2. economy and territory	B. types of territory (because we need to be able to describe the different varieties of territories, towns, ecosystem districts, etc.).
3. territorial ecosystems	C. territorial dynamics (because we are interested in the way in which the territorial ecosystem changes under the effect of multiple social, economic, technical and political dynamics)
4. equipment and networks	
5. cultural capital	D. local stakeholders (because for us, the local area is an ecosystem of stakeholders and not simply an administrative and political entity)
6. organisation of space	E. areas of governance (to describe the entire field of public policy)
7. flows and territories	F. the means of governance (as varied as standards, plans, taxation and financing)
8. institutions and territories	G. governance principles (because territorial governance must comply with general principles that apply to all public governance)
9. territories and the world (local and global)	H. transition (since CITEGO is particularly interested in transition strategies)
	I. systems of thought (because they have a profound influence on the way we look at territories and their governance)

The pragmatic nature of this construction must be emphasised here: *it is correct not because it conforms to a theory but because it works*, because it effectively covers all the issues addressed. Each first-order descriptor belongs to one of the cells in the matrix.

Descriptor family tree: ascendants and descendants

The combination of descriptors from close to close is similar to kinship links. Each descriptor is made up of two parents, with a chain of ascendants and descendants, so that it is possible at any time to go back to more general descriptors (the ascendants) or to go down to more precise descriptors (the descendants).

Descriptor descendant chains

In the visual presentation of the atlas, it is always possible to go back up the chain of relationships to the first-order descriptors, and even to see at the intersection of which row and which column the descriptor is located. Example: "climate and territory".
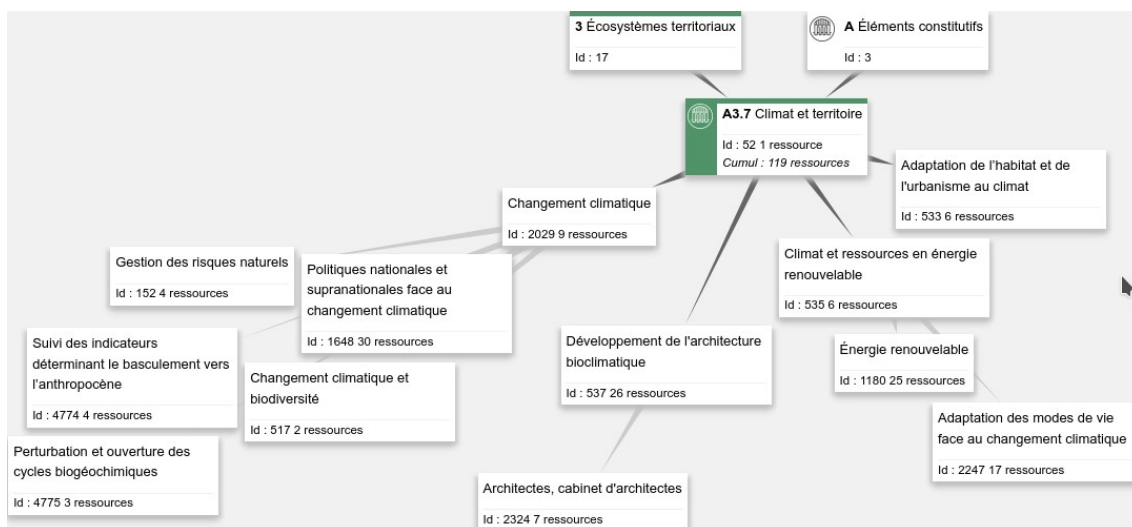

It comes from crossing the "territorial ecosystem" line and the "constituent element" column: climate is indeed one of the constituent elements of territorial ecosystems.

On the graph, 'Climate and Territory' has an extensive family tree, as it crosses a wide range of ecological, economic, technical, social, cultural and political issues. Each of the descendants is represented only by its

relationship with 'climate and territory', otherwise the graph would be illegible, but each time you click on one of the descendants you will see its other ascendants appear.

Let's take the example of an immediate descendant: "climate change". It is a descendant of both "climate and territory" and a third first-order descriptor, "ecosystem dynamics", itself a result of a cross between "territorial ecosystems" and "territory dynamics".
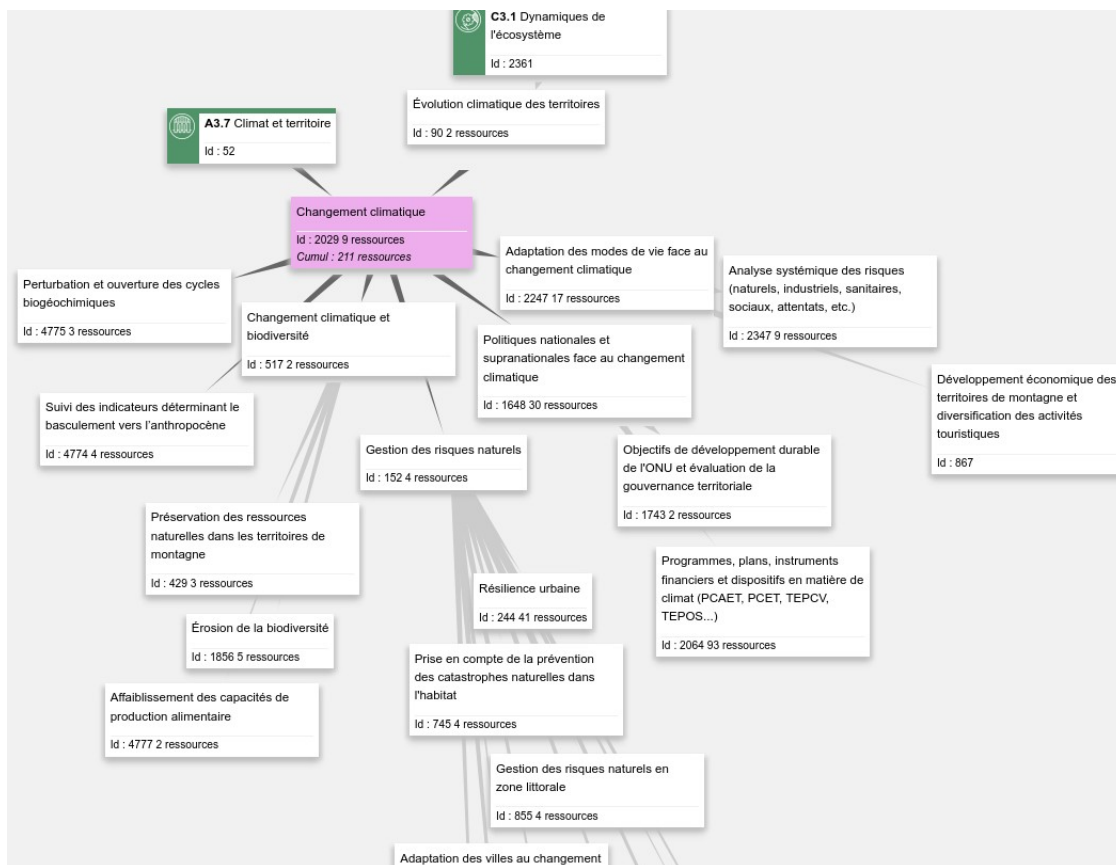
As we work our way down this tree, we will discover that many of the first-order descriptors come into play in turn, giving concrete expression to the systemic nature of the climate issue in the territories.

Is the atlas fixed or evolving, and who can decide whether it should evolve?

As in chemistry with the development of new products, each time we encounter a new reality we can develop the atlas in three ways: by creating new relationships between existing descriptors; by creating new descriptors from the list of first-order descriptors; by creating new first-order descriptors?

a) *The creation of new relationships between existing descriptors.* Very often, we discover that descriptors have relationships that we didn't know existed. Nothing could be easier than introducing them.

b) *The creation of a new descriptor.* The atlas is a "*commons*": an asset available to all members of the community of resource sites who use it to index and share their documentary resources, which presupposes *firm governance and respect by all for the disciplines without which it would quickly become a Tower of Babel.* When indexing a new case file, it is tempting to be too quick to say "there is no descriptor corresponding to what I want to designate, let's create a new descriptor". But if, in fact, a descriptor already exists, the new descriptor will be a "duplicate" of the previous one, which will disperse the search results. This is why any member of the community has the right to propose a new descriptor, but it will only be validated at the end of a centralised control procedure carried out by Citego, which presupposes an intimate knowledge of the atlas that only its daily use can provide.

c) *Creating a new first-order descriptor.* It is possible, in the context of a community of resource sites that is broadening the scope of its concerns, that the initial list of first-order descriptors or even the matrix used to construct it is no longer sufficient to cover new issues. In this case, new first-order descriptors need to be created, but only after a collective decision.

How can I view the corpus of records corresponding to a given descriptor?

When we index a document, we have to look for the finest possible descriptor, the one that best matches the reality. But this leads to a paradoxical situation: descriptors corresponding to a general question, such as "climate and territory", are of little use in indexing a record directly, so that a search based on this descriptor will prove more than disappointing: zero records indexed with this descriptor! Strange for a site with over 3,500 records and a focus on transition. But it's precisely because it's so general that all the records are indexed with more precise descriptors. To do justice to this descriptor, we should not ask how many records are indexed with it, but how many are indexed *with it or one of its descendants*. This question is answered by the notion of *accumulation.* In the graph already shown, the answer appears: 119 resources!

The atlas is not an avatar of artificial intelligence designed to replace human analysis, but *a powerful reinforcement of that analysis* by enabling it to explore the links arising from a vast corpus of case files.

How can the atlas be used to "get to the bottom of an issue"?

The various uses of the atlas described above lead to the idea of a thematic summary. Of course, the best experience database in the world can only provide what it has, and a thematic summary drawn from the Citego database will not be able to fill in the gaps. On the other hand, we can see that there are many descriptors for which the cumulative number of references to records exceeds fifty. By combining the different approaches described above, we can quickly identify summary elements for each of these descriptors, veritable "guided tours" of the experience bank, the main virtue of which is that every idea put forward is backed up by case files. This function will take on its full importance when we move to a community of resource sites: the community will be able to decide to periodically select themes to be explored in greater depth together, using the common corpus as a basis and adding to it.