



Improving social impact assessment of protected areas: A review of the literature and directions for future research



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ABSTRACT

Protected areas are the most widely applied policy tool for biodiversity conservation. However, effective management of protected areas is often obstructed by conflicts mainly associated with the social impacts imposed on local communities and other users by their establishment. Despite the importance of these social impacts they remain significantly under-researched. There is now an increasing need to incorporate social impacts in decision making processes by providing accurate estimations and develop ways to forecast their change in the future. Considering the increase of studies identifying this need, the present paper aims to indicate three main directions that will assist in designing effective tools for measuring and most importantly understanding social impacts: a) perceptions on social impacts of individuals who are directly affected by protected areas need to be incorporated in management evaluation techniques in a meaningful and accurate way and be combined with objective measurements of impact; b) understanding the factors determining the actual and perceived levels of social impacts is a key step for the design of effective management frameworks of protected areas and c) social impacts should not be seen as static concepts but should be seen as a dynamic and long-term factor which needs to be incorporated in decision-making processes.

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1. Introduction

Protected areas are of growing importance internationally due to the urgency in meeting biodiversity conservation targets and also because

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of their role in adaptation and mitigation of climate change impacts (Dudley et al., 2010; IUCN, 2012; Soares-Filho et al., 2010). In this context, the need to create new, and re-strengthen existing, legislative frameworks concerning protected areas (PAs) will become essential in the near future, both by the establishment of new PAs or through reconsideration of the boundaries of existing ones.

PAs are established in order to meet two main targets: to conserve biodiversity but also to provide society with ecosystem services, such as protection from flooding and food production (Dudley, 2008), as well as cultural ecosystem services through tourism and recreation (Church et al., 2014). In the present paper we aim to discuss social impacts assessment of PAs as this type of impacts are a major factor influencing social acceptability for conservation initiatives. Several factors have been identified explaining the reasons behind social acceptability and compliance with PA regulations (Adams et al., 2011; Gall and Rodwell, 2016). The social impacts of some types of protected areas are a key topic in this discourse (Andrade and Rhodes, 2012; Bennett and Dearden, 2014; de Lange et al., 2016; Gall and Rodwell, 2016; Voyer et al., 2012) as they represent the costs and benefits following the designation of a PA (Charles and Wilson, 2009; Lowry et al., 2009; West et al., 2006). Apart from their physical composition, the effectiveness of PAs will depend on the willingness of communities (affected by their establishment) to comply with any new regulations imposed and their social impacts.

In our analysis we will focus on PAs where humans are significantly influenced by their establishment. In order to further explain this we need to briefly describe the main categories of PAs internationally. According to IUCN there are 6 main types: (Ia) *Strict Nature Reserves* which is the most restrictive type of PA regarding human activities; (Ib) *Wilderness Areas* where there are significant restrictions for humans but there has been also traditionally a limited impact by humans in the area; (II) *National Parks* which are usually large areas established in order to 'protect natural biodiversity along with its underlying ecological structure and supporting environmental processes, and to promote education and recreation'. This type of PA will often have zones where regulations resembling those of category Ia are enforced; (III) *Natural Monuments or Feature Areas* which are often small areas with a large number of visitors; (IV) *Habitat/Species Management Areas* which focus on the protection of a particular species or habitats and require intervention to secure successful protection; (V) *Protected Landscape/Seascape areas* which are of significant value due to the unique interaction which has been developed between humans and nature; (VI) *Protected areas with sustainable use of natural resources* where biodiversity conservation targets are not the primary focus. The aim is to preserve the area along with local cultural values through a traditional resources management system. There are also 4 different types of management frameworks recognised by IUCN: Public (managed by the state), Private (governance by private owner or non-profit organisations), Shared governance (referring mainly to collaborative management frameworks) and PAs governed by indigenous people and local communities. Social impacts are expected to be more evident in 'strict' management frameworks, such as *Strict Nature Reserves* which impose significant restrictions on local populations as all activities are prohibited in the specific geographical area and also *National Parks*. In the latter case due to the large size of national parks and their multiple aims in terms of biodiversity conservation it is expected that their establishment will affect a variety of local uses, increasing potential conflicts. On the contrary, wilderness areas are those where there has been very limited intervention by humans and Natural monuments are often very small areas where the focus is on tourists and protected landscape designation does consider the co-existence of local communities within the specific landscape. Regarding the different management frameworks, in our analysis we will focus mainly on public and shared governance of PAs as these are frameworks where there is a clear influence from a top-down mechanism in the formation of social impacts.

Although the discussion around social impacts of PAs has significantly increased in the past decade and several methods have been proposed incorporating the assessment of PAs' impacts in policy-making processes (Franks and Small, 2016; Leverington et al., 2010; Schreckenberg et al., 2010; Tempesta and Otero, 2013) they remain one of the most under-represented topic in the field of biodiversity conservation (Voyer et al., 2012). This is a gap that has been recognised in the Social Impact Assessment (SIA) literature where often in large projects there is a 'technical and technocratic focus' with non-technical issues such as social being given limited attention (Vanclay et al., 2015).

In this paper we take a closer look at social impacts of PAs, focusing on the specific types of PAs mentioned above, and we discuss three main challenges in this process. Firstly, we propose the need to develop evaluation frameworks which focus both on subjective and objective measurements of social impacts. These refer both to the impacts as these are perceived by communities affected by the designation of a PA combined with more 'objective' measurements allowing the detailed observation of social impacts. Secondly, we emphasize the need to develop a framework explaining the numerous factors influencing the level of social impacts. Finally, we propose that social impacts should not be seen as static concepts but as a dynamic and long-term factors which need to be incorporated in decision-making processes.

2. Social impacts of PAs

2.1. Social impacts

Social impact refers to 'the consequences to human populations of any public or private actions that alter the ways in which people live, work, play, relate to one another, organize to meet their needs and generally cope as member of the society' (Burdge et al., 1995). These social impacts can refer to a variety of issues such as the change on 'Peoples' way of life, their culture, their community (and its cohesion), their political systems, their environment, their health and well-being, their personal and property rights, their fears and aspirations (Vanclay, 2003). In the Ecosystem Services literature, social impacts are often included under the wider umbrella of well-being and according to the *Millennium Ecosystem Assessment (2005)* there are five determinants constituting well-being linked with ecosystem services: a) security, b) basic material for a good life, c) health, d) good social relations and e) freedom of choice and action; each one including several sub-categories.

In the next paragraphs we will analyse the main impacts that have been presented through case studies and theoretical discussions in the literature of biodiversity conservation and social impact assessment. We start our analysis based on the fundamental argument that the most important change that a PA establishment brings (especially in the case of National Parks and Strict Nature Reserves) is the imposition of a new management framework where new regulations in relation to the natural resources and infrastructure are imposed (Ghimire and Pimbert, 2000; Stevenson et al., 2013; Charles and Wilson, 2009; Rees et al., 2013).

2.1.1. Poverty

Poverty levels are influenced by PAs mainly due to the development of tourist and recreational activities and the change in the use of natural resources (Ferraro and Hanauer, 2014). Three main categories of impacts have been identified in the literature relating to poverty: security, opportunity and empowerment (Gurney et al., 2014). Although concerns have been raised in the literature that PAs can significantly affect local communities financially in a negative way (Eneji et al., 2009), there is strong and recent evidence that PAs can contribute to the reduction of poverty levels in local communities (Ferraro and Hanauer, 2014; Canavire-Bacarreza and Hanauer, 2012; Clements et al., 2014). The establishment of a PA often implies significant positive impacts on employment (Cernea and Schmidt-Soltau, 2006) through the creation of new job

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