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Perspective

Towards an indicator system to assess equitable management in protected areas



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ABSTRACT

Aichi Target 11 (AT11), adopted by 193 Parties to the Convention on Biological Diversity (CBD) in 2010, states that protected areas (PAs) must be equitably managed by 2020. However, significant challenges remain in terms of actual implementation of equitable management in PAs. These challenges include, among others, the lack of a standardized approach to assess and monitor social equity and the difficulty of reducing social equity to a series of metrics. This perspective addresses these challenges and it proposes a minimum set of ten indicators for assessing and monitoring the three dimensions of social equity in protected areas: recognition, procedure and distribution. The indicators target information on social equity regarding cultural identity, statutory and customary rights, knowledge diversity; free, prior and informed consent mechanisms, full participation and transparency in decision-making, access to justice, accountability over decisions, distribution of conservation burdens, and sharing of conservation benefits. The proposed indicator system is a first step in advancing an approach to facilitate our understanding of how the different dimensions of social equity are denied or recognized in PAs globally. The proposed system would be used by practitioners to mainstream social equity indicators in PAs assessments at the site level and to report to the CBD on the ‘equitably managed’ element of AT11.

1. Towards equitably managed protected areas

Protected areas (PAs hereafter) are essential to maintain biodiversity and ecosystem services but also to support human well-being (Cardinale et al., 2012). Currently, some 14.7% of terrestrial and inland waters and 10.2% of coastal and marine areas within national jurisdiction are protected (UNEP-WCMC and IUCN, 2016). PA expansion has occurred simultaneously with a greater emphasis on social considerations and goals in conservation science and practice (Mascia et al., 2003; Ban et al., 2013; Mace, 2014), exemplified in the recent social-ecological approach for PAs (Miller et al., 2014; Palomo et al., 2014) and the integration of a range of diverse social data in conservation planning (Stephanson and Mascia, 2014; Whitehead et al., 2014). These

social considerations have also been included in conservation policies; for example within the ‘equitably managed’ element of the Convention of Biological Diversity (CBD) Aichi Target 11 (AT11 hereafter) on PAs. Understanding and addressing social equity in PAs is crucial to deliver conservation outcomes because inequity can threaten conservation goals (Halpern et al., 2013; Oldekop et al., 2015; Klein et al., 2015; Cetas and Yasue, 2016) and raise costs (Barnes et al., 2015).

In the context of PAs, social equity is often associated with the distribution of benefits – largely financial such as tourism revenues, and burdens – such as the loss of access to land and/or natural resources within the PA. While important, distributional aspects are but one dimension of equity (Schlosberg, 2007), which also contains aspects of procedure and recognition (Pascual et al., 2014; Martin et al., 2015).

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Procedural equity refers to how decisions are made, such as who should, or should not receive benefits and burdens, and how inclusive participation of stakeholders is ensured. It includes transparent management approaches, access to justice to solve conflicts and the participation of all stakeholders in decision making (Figueroa and Mills, 2001). Recognition is linked to who can take decisions and it refers to acknowledgement and respect for social and cultural diversity as well as for the values, rights and beliefs of stakeholders. It also requires that the management of PAs considers the pre-existing uneven capacity of different stakeholders to access and influence decision making (Whyte, 2011).

As inter-dependent conditions of social equity, distribution, procedure and recognition are also central dimensions for the assessment of social equity in PAs. Most efforts to assess social equity in PAs have focused on identifying the distribution of costs and the sharing of benefits (for a review see Schreckenberg et al., 2010 and De Lange et al., 2016). Procedural issues and their links with matters of recognition have received less attention (see Lockwood, 2010; Borrini-Feyerabend et al., 2013; Wilkie et al., 2015; Shields et al., 2016). Furthermore, although multidimensional social equity principles in PAs have been conceptually defined (Schreckenberg et al., 2016), still the variety of methodologies and tools employed to assess the different dimensions of social equity separately (see De Lange et al., 2016 for a review), along with budget and time constraints, are key concerns for policy makers and specially those working on conservation practice.

Although the need for a systematic approach to operationalize assessments of social equity in PAs has been broadly acknowledged, there is a gap to connect conceptual principles of social equity to a practical indicator system on this matter. This perspective seeks to fill this gap. We first describe the criteria of social equity to be measured in the context of PAs management. Then, we propose a minimum set of (ten) indicators that would, if collected, provide valuable information about the impact of PA establishment or/and management on social equity. Finally, we discuss how these indicators might be deployed to effectively track progress towards the equitable management element of the CBD 2020 AT 11.

2. Assessing social equity in PAs: what to measure?

Two initial questions guide our approach about how to assess social equity (McDermott et al., 2013): What is understood by ‘equitable’ PA management? And, for whom should it be equitable? First, according to the Convention on Biological Diversity (CBD) (2010), PAs should not (in their establishment and management) have a negative impact on local stakeholder groups. Moreover, they should contribute to a reduction of the inequities experienced by the most vulnerable local stakeholders, where possible. Second, the subjects of equity are local stakeholder groups geographically located within or near the administrative boundaries of PAs, as well as those having a relation of practice (i.e. traditional or current claims, or common or significant uses of natural resources or interactions) with the PA (Reckwitz, 2002).

We understand ‘equitably’ managed PAs as a dynamic process where interactions among the different dimensions of social equity (recognition, procedure and distribution) co-evolve (Fig. 1). It should be noted that these dimensions are mutually non-compensable; failure to comply with one of the dimensions, cannot be compensated by extra efforts in improving the status of another dimension.

While several principles associated within each social equity dimension have been identified in the literature (Schreckenberg et al., 2016), PA practitioners and policy makers still lack clear guidance about what an equitably managed PA looks like, and what information about PAs should be gathered and monitored in the context of AT11.

Drawing on the discussions from a three days interdisciplinary workshop “Operationalizing social equity goals in protected areas: how do we track progress at global level?” (February 2016), we describe the

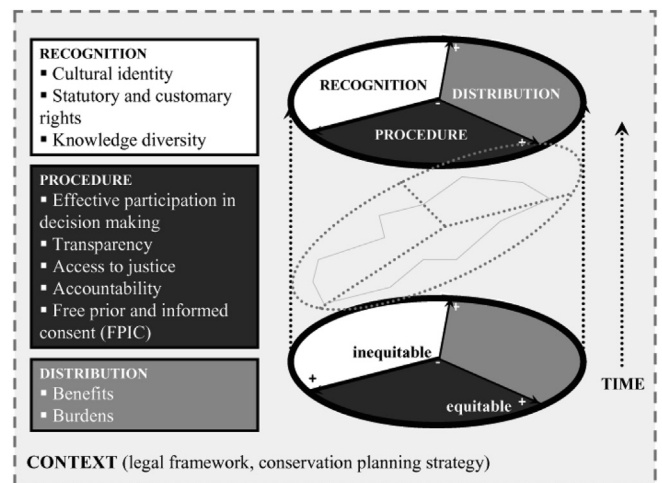


Fig. 1. Dynamic equity framework showing the main social equity criteria; which ranges from the status of inequitably managed (–); to equitably managed (+), through the no impact (or when negative impacts are appropriately compensated) on local stakeholders groups. As equity dimensions co-evolve, each equity criteria with its own metric is likely to stand at different positions on the vertical over time, moving upwards and downwards at different rates in each PA context.

key social equity criteria which could help policy-makers and practitioners assess and track the equitable management of PAs. These social equity criteria are selected on the basis of having been already broadly conceptualized in the context of PAs, are easily translated into an indicator generally applicable to the different types of PA worldwide, and where several stakeholders involved in the management of PAs (government, private agencies, NGOs, communities) could assess and respond to using a simple questionnaire.

2.1. Recognition

Recognition has a long philosophical and political history, with roots in Hegelian ethics, critical theory and post-colonial studies (for a detailed conceptual introduction to the concept of recognition in the context of conservation see Martin et al., 2016). Described by Honneth (1996) as the ‘moral grammar of social conflicts’, recognition deals with respect of identity and the valorization of social and cultural differences, including gender.

Failure to account for this dimension in PA management typically occurs when some stakeholders are seen as ‘inferior, excluded, wholly other, or simply invisible’ (Fraser, 2000). In this case, their needs are neglected or ignored, which may result in physical eviction from PAs, but also in economic or symbolic exclusion (Brockington and Igoe, 2006). For example, Goldman (2011) shows how Maasai communities became ‘strangers in their own land’ following the appointment of the Tanzanian Land Conservation Trust over a ranch. The trust’s managerial approach ignored local Maasai history and symbolism, discredited their traditional local knowledge and disregarded local notions of authority.

We use three criteria for assessing recognition in line with the principles defined by Schreckenberg et al. (2016): recognition and respect for diverse cultural identities; recognition and respect for statutory and customary rights; and recognition and respect for different knowledge systems. One’s culture and identity can shape their understanding of what requires or deserves conservation (Martin et al., 2016). For instance, cultural identities and religious beliefs create strong forms of attachment to sacred places and totem species, which are the oldest examples of conservation (Dudley et al., 2009). Respect of statutory and customary rights is also central; the failure to recognize local social norms and associated informal institutions for example, may lead to distrust, conflict and/or a lack of support to PA management decisions among local stakeholders groups (Brooks et al., 2012; Hicks and Cinner, 2014). Additionally, for equitably managed PAs it is

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