Final Report

Joint Initiatives Program (JIP): Resource Management in Protected Areas and its Impact on Human Development: A Comparative Sustainable Development Study of the Mau Narok Forest Reserve (Kenya) and the Serra da Estrela Natural Park (Portugal), by Prof. João Luís Jesus Fernandes and Mr. Nicholas Kariuki Githuku.

Postal Addresses/Email (Contacts)

Name/s: João Luís Jesus Fernandes Address: Instituto de Estudos Geográficos

Faculdade de Letras Universidade de Coimbra Largo da Porta Férrea 3000-447 Coimbra

Portugal

Email: jfernandes@fl.uc.pt

Nicholas Kariuki Githuku Armed Conflict & Peace Studies Department of History University of Nairobi University Way, PO Box 30197-00100 GPO, Nairobi Kenya.

nich121@yahoo.com

In order to allow a final evaluation of the Project Tokyo Foundation kindly supports, we are pleased to address this report with reference to activities undertaken since the submission of the mid-term report and the entire period of our research.

Since we might do a synthetic presentation, we will make a summary of all activities done and make a few concrete statements on conclusions reached in our study. We intend to make more detailed and much thorough conclusions arrived at in our planned future outputs as we conclude the analysis of findings in the near future.

Following the plan we outlined in our award candidature/proposal, our research was dictated by a few intellectual and operative concerns. Low-density geographic spaces, usually called rural territories, deserve a new focus/perspective. A dangerous and dualistic perspective, balanced between the good and the bad, the positive and the negative, characterizing these territories, has limited the way they are viewed. With modernity and the rational thought of illuminism, good qualities were attributed to urban spaces and the bad ones to rural, remote and marginal areas. These biases were a strong influence to creative works, such as cinema and literature, and consequently a high influence to public opinion and, in a certain sense, worked as an accelerator of rural exodus (FERNANDES, 2001). In what respects literature, we must emphasise the book "A Cidade e as Serras" (The City and the Hills), written by the great nineteen century Portuguese writer, Eça de Queirós. In this book, the author makes a satirical remark about these dualistic perspectives, using a character named Jacinto, a Portuguese noble living in the 'most civilized capital' of the world in the nineteen century, Paris (France). Jacinto, who also happens to be the heir of a rural farm located in the remote Portuguese Douro region, a 'faraway and old fashion remote space,' starts a return journey to his origins. This trip was to him a sort of pilgrimage to the past, the premodern, a dark uncivilized world, which existed before the civilized industrialmechanic revolution. To urbanized Jacinto, big global cities were the only geographic landscapes of civilization and the technological improvements, the only way to reach happiness. Paris, the city of lights, was the best example. Anyway, Eça de Queirós, in that book first published in 1901, makes a surprise twist, as manifested by Jacinto's own to whom the trip signified a good individual surprise as it ushered him into a path of

personal enrichment. Jacinto makes, in the Douro region, an unexpected discovery: he discovers himself, something only possible when we stop and think and look within ourselves. To Jacinto that rural space opened his mind and enriched his soul. ¹

Nowadays, faraway from simplistic dualisms, we see territories as an interconnected whole. The social pattern is now much more complex and dynamic, and urban and non-urban features are now scattered with high density and low density spaces being deeply linked.

Our contemporaneous age is now an era of great velocity in social life with strong and fast changes, almost subordinating the essential to the ephemeral and the structural to the occasional and easily consumed (BRUNET e DOLLFUS, 1990). This fact, joins with one tradition from nineteen century Romantism and Naturalism age, when the first natural parks were created. Thus linked to current post-modernism times, it reinforces the ideology of classification of goods and places creating higher pressure to a wide diffusion of protection legal forms, most of them associated with rural spaces.

That flow is linked with functional targets. Rural spaces, despite their artificial features, are territories with a low degree of humanization in terms of settlement or occupation. These areas are essentially important in ecological subjects and are an important field in what respects the psychological well being of urban populations. Present literature also looks at rural spaces as a store of symbolic heritage identity, especially important and strategic feature in a rapidly changing world. After all, rural areas are now relevant because important economic agents look at them as excellent profitable opportunities, mainly under the ecotourism industry. Classified and protected spaces could be, even if they are limited by narrowly defined uses, important human and sustainable development instruments. However, the debate is complex and certainly not nearly coming to an end. As researchers, we wondered if these protected areas are the best way to promote human and sustainable development. Do these protected spaces have a good and/or a bad face? Would would-be good and bad faces be well distributed, with equity, between local and non-local populations? Is this classification status equally adapted to different spatial geographic contexts? Are protected areas, the best choice populations could use to re/act to globalisation pressures and, with them, re-build development strategies? These were some of the most important questions that drove our scientific investigation last year (2006).

Before a summary of our most important conclusions, here only presented in a synthetic manner, we deem it important to highlight all our activities since February 2006, when the JIP award was first announced and granted until now (January 2007).

The first stage was bibliographic research. This activity is still on-going, as we are keen on good newly published texts in our theoretic and empiric field. Public and on-line libraries research for new references, the acquisition of new books and reviews, the new reading of old bibliographic texts, every option were important in this regard, in order to consolidate our theoretical background, our methodological skills and the familiarity to our both study cases, Portugal and Kenya. New insights of nature conservation, geographic spaces classification and new concepts on development were important goals of our search.

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¹ Free download of the original Portuguese-speaking book on site http://purl.pt/234/3/.

From the very beginning of our research period, we started preliminary visits to both case studies, Serra da Estrela, in Portugal and Mau Forest Complex, in Kenya. Those trips followed various objectives namely: for future fieldwork preparation, early contact with local institutions and authorities, gather foundational information of these geographic spaces and respective social frameworks and the choice of micro-sample places, where we could use the questionnaires. In two of those trips to Serra da Estrela, João delivered and picked up the questionnaires in an elementary school in Loriga, answered by 100 students while Nicholas delivered over 250 similar questionnaires to students in seven schools around Maasai Mau.

All of it was done, as declared in our preliminary report, on the basis of constant communications between both of us, by phone and email. With those contacts, we worked and discussed our strategy and methods.

These research excursions to our two fields of study had two great highlights: João's trip to Kenya in June, and Nicholas's trip to Portugal, September (2006). We have already sent Tokyo Foundation a few words about these field tours in our mid-term report. Even so, words are not enough to describe the events, the feelings and emotions, the personal relations and ties, and the scientific engagement experienced during those two intensive fieldwork weeks, the first in Kenya, the second one in Portugal.

In June, when João went to Kenya, the fieldwork started in the capital urban spaces (Nairobi). This included visiting formal and informal settlements (slums) and the Nairobi National Park, which were an important element in understanding the way urbanization is changing Africa. The informal settlements (Kibera and Mathare slums) are geographic testimonies of important migration flows, especially rural-urban exodus. Our question was: are populations living there mainly rural people? Why is Nairobi attracting these people? The city is a must but is rural space a demographic push territory and if so, why? What is happening there? We visited the Nairobi Natural Park, a protected area with a special location: near the great capital, Nairobi, a city with a fast growing dynamism. Inside the Nairobi Natural Park, was one significant and special stop in one of the most important and symbolic places to Kenya's conservation politics: the scene of the burning of 12 tonnes of ivory and where a monument now stands celebrating the historic state destruction of the poached elephant tusks meant to feed the illegal trade of these biological/nature products. In a plague on the monument were thes following words uttered by the immediate former President of Kenya, Daniel Arap Moi: "Great objectives often require great sacrifices. I now call upon the world to join us in Kenya by eliminating the trade in ivory once and for all."

The visit to Narok District, contacts and interviews with local institutions, the visit to a Kalenjin village, inside the gazetted forest perimeter, were significant moments with high personal and scientific intensity. Visiting and collecting the questionnaires in all schools previous delivered by Nicholas was also very important and vital to our work. The contact with local students, teachers and populations in whole was equally relevant. The visit to different points of the Kenyan nature conservation network, like Lake Nakuru National Park and Maasai Mara Reserve, was an like open book to understand the sense in which tourism is important to the economy of the country and, in that respect, the weight of protected areas.

In this week of field research in Kenya, we must emphasise the organization and holding of our research build-up seminar, which we dubbed the Joint SYLFF Environmental Research Group Workshop, held on 12th June, in Nairobi. The open discussion of the subject environment, protected areas and development between different agents was a stimulating moment with long-term results. (Please refer to video footage of conference proceedings).

Nick's journey to Portugal started with a few meetings between us to discuss theoretic and practical issues after which we were able to decide a few important matters pertaining to the future of our joint research.

The visit to the Serra da Estrela Natural Park, which included a team of young Portuguese research assistants, was one of the highlights. The contacts with local populations and institutions, interviews, questionnaires to tourists, were the hot-spots of our fieldtrip to that region. On the evening of 20th September, we held a meeting in small seminar/board room of our hotel with the field research team. The review of the day's work and the preparation for the next were the main purposes. Besides these, we discussed overall JIP work, analysed photos took in Kenya and even discussed the SYLFF framework of the entire project.

We cannot understand the territory without integrating those places in a wide geographic scale. Serra da Estrela is, in a certain sense, the mirror of Portugal as a whole. This was the reason why we, as we also did in Kenya, visited and discussed different Portuguese protected areas. That week was a real 'road action movie' of sorts covering Serras de Aire e Candeeiros Natural Park, Ria Formosa Natural Park, Sudoeste Alentejano e da Costa Vicentina Natural Park, and cities like Lisbon (located close to a wide range of protected áreas) and Algarve (the biggest and most damaged touristic territory in Portugal) all within a short period. Territory, nature conservation and sustainable development, tourism, rural depopulation, now in a European context, were our concerns.

During our visit to Algarve, we also made contact with "A Rocha," on 22nd September, near Portimão. 'A Rocha' is an international Christian NGO engaged with nature conservation and development, and organized as a network of different nature-points scattered worldwide.² One of those agencies is situated near Arabuko-Sokoke Forest along the East African Coastline, Malindi, in Kenya. Our meeting had the purpose of hearing their response to the invitation to participate in a possible eco-tourism development project in the Mau Forest Complex suggested/proposed to the Global Environmental Facility ((GEF) office in Nairobi by Nicholas.

One of the most stimulating activities in both Portugal and Kenya, during those two fieldtrip weeks and in other individual trips, was the collecting of video images for the purposed documentary. With Portuguese and Kenyan professionals, with our own video cameras, this was an important activity, now with more than 25 hours of video-footage: interviews and landscapes, traditional and innovative activities, local and non-local people, workers and tourists. First of all, that work meant a stimulation to look deeply and critically to reality even of the very minute details. Interested in professionalism, work on this documentary took us/ João to Seia, to attend the *Cine Eco 2006*, 12th

² For more details, see http://pt.arocha.org/home/ and Harris (2006)

International Festival of Environment Cinema and Video, held between 20th and 29th October 2006. Watching a few sessions of that festival had a two-pronged purpose. First, a technical interest about organizing and making an environmental documentary, target largely reached with the high medium quality of all works presented. Second, we went there with the purpose of critically hearing and seeing a few works, closely related to our particular subject.

The work of Jean-Phillippe Duval and Hélène Choquette, (2006) *The Refugees of the Blue Planet*, discussed in what sense environmental changes might, in different parts of the world, push forced migration. That documentary about environmental displaced populations was a key factor in our decision of making a work about that subject: forced migrations due to ecological degradation but also to certain nature conservation politics, as in some parts of Kenya and other countries.

The particular interest to the way Serra da Estrela could be captured with a vídeo camera, drew us, in November 2006, to Figueira da Foz, to attend a documentary projection and discussion: the movie of Jorge Pelicano (2006), *Ainda há pastores* (Shepherds Still Exist). Filmed at Gouveia and showing that part of the Serra da Estrela Natural Park with the eyes of a few lasting shepherds, this work focuses on the process of de-ruralization suffered by this territory, with the consequent fall in cattle breeding activity. This forum not only acted as an auxiliary to our edition work but also as a source of information for our scientific text.³

Both study areas were deeply covered by photographic material. In fact, photos are one of the most relevant working pieces in this research, especially significant in future publications and public presentations of the work.

Data collecting, whose future statistic treatment shall be strategic to our final outputs, was another important stage, with low financial costs. The preparation of cartographic bases for future representation of those statistics was another important stage. In what respects cartography, our strategy was: use less money, work with fewer people outside the project. The option was the self-preparation in order to we could make ourselves our own maps. This is why we have already started our skilled preparation on ArcGIS 9.0, Geographic Information System software.

Also in November, we/ João attended a congress in Leiria called *Turismo Cultural*, *Territórios & Identidades* (Cultural Tourism, Territories and Identities). This event was convened to discuss the role of tourism in population progress, its potential (particularly in territories now suffering from de-ruralization and de-industrialization, for example, Serra da Estrela), but also its risks and negative effects: for instance, the deterritorialization of local communities, that is, the loss of links between populations and their traditional territories and the loss of power to freely appropriate and use resources within certain acceptable and pre-determined limits. This second case could, globally, be related to the model of ecotourism observed in some parts of Kenya.

Another highlight was the preparation of a paper (THE ECOLOGICAL PARADIGM: Protected Areas Versus Human Development) and its presentation at the International Conference On Economics of Environment, Natural Resource and Energy, held at the

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³ For more information, follow the site http://aindahapastores.blogspot.com/.

University of Jadavpur (India), on 2nd and 3rd January 2007, that is, close to the date we wrote this final report. In that meeting, we presented and discussed a few ideas, analysis and facts about our research, in a presentation well accepted and deeply discussed by all participants. In spite, the conference's heavy bias towards environmental economics, and specifically *econometrics*, there were remarkable presentations that overlapped with our study. One such presentation was in experimental economics by Professor Shreekant Gupta in his paper Community Participation Through Reciprocal Altruism, which is a model being developed to determine the degree of community participation in the management of common resources. Employing concepts such as the prisoner's dilemma game and logic for collective action, he noted that it is possible for communities to evolve stable rules to govern or maintain and regenerate nature spaces and products that are owned by communities in partnership. Another important presentation closely related to our study was by Professor Ramprasad Sengupta (Jawaharlal Nehru University): Human Development, Environmental Sustainability and *Institutions* in which he advocated for a needs-based welfare approach to development/or mass-based or ecological economics with an interface between human society and nature. Other papers related or relevant to our study dealt with participatory or joint forest management, whether institutional change can lead to economic development and institutional dysfunctionality of some protected areas in India (Buxa Reserve, North Bengal). Lekha Mukhopadhyay, a lecturer at Jogomaya Devi College who presented this latter paper, would later, in reaction to our presentation note similar instances of government evictions of locals from some parts of forests in Buxa Tiger Reserve like those in our Kenyan case study.

Reacting to our paper, Professor Goutam Gupta, one of the organizers of the conference noted that the tension between environmental protection and conservation and human development was also experienced in some parts of India and were being dealt with by the Forest Rights Bill, in spite of which tribal interests in the country still faced a serious threat. He called for closer attention to this tension, something Professor Joyashree Roy, another organizer of the conference, would later commend as a future concern for environmental economists.

Professor (of Economics, University of Connecticut)) Subhash Ray who chaired the session emphasised the need for our JIP study to compare and distinguish closely the "push" factors contributing to emigration from the two case studies (see conclusion No. [vii] p. 20). Papers presented will be consulted once they are ready, contributions made at this conference incorporated in our study and contacts forged/made utilised to further enrich our study.

This long road above leads us to a few ideas and statements, synthetically presented in the next 3 points:

1 – Territory, Development and Values

The beginning of this century has been characterised by growing difficulty in classifying territories where the daily life of the people unfolds. Concepts such as *periphery, marginality* and *centre* are now less easy to apply. Indeed, this logic of approaching geographic spaces should rather be included in the wider debate on processes and dynamics, on concepts and development frameworks. Before

categorizing a population's given territory, or the territorialities, it is important to give due consideration to the dynamics of development encompassing such realities. The processes, mechanisms and directions of change are more important, in fact, than finding suitable adjectives (RIST, 2002).

There is, however, one set of premises that ought to be borne in mind in this debate. Reflecting on the development of territories and populations implies the assumption of certain key ideas, at the beginning of this new millennium, in relation to western societies and non-western societies.

In the first place, it is important to recognize that we are in an abstract social environment referred to as *post-modern* (or *advanced modern*, as some would have it). This is overwhelmingly marked or qualified by heterogeneity and diversity, which frequently escapes the uniformizing stream, only apparently a faithful expression of contemporary geographic and socio-cultural realities (DOLLFUS, 1998). In spite of it, we must stress again that this post-modernity is not the reality everywhere and that we still live in a world marked by diversity (BRUNET and DOLLFUS, 1990). The comparative studies should help us the understanding of that reality. As we show below with our reference to two case studies, we live in a world where populations experience different problems (THUMERELLE, 1996).

We are ware about the danger face of the word 'development'. Commonly read as a simple way to promote, worldwide, the simple western point of view; frequently saw as an instrument of power and new colonialist adventure, this word could involve a new perspective, the one that respects self determination and local focus (POTTER *et al*, 2004). In fact, development science is not dead. The future of all world populations and the shrinking interconnected world put all politicians and academics in front of new threatens and challenges (TORRES, 1998).

Furthermore, we highlight yet another significant fact regarding the approach to development at the beginning of the 21st century: That is the growing interdependence of all the points (or perspectives) in a system that is now defined by its globality. A discussion about development implies reflecting on the terms of the meeting between local and global scales. The planetary system, the mechanism for interaction and interrelation at the world scale, is read differently in any of the perspectives from which the observer perceives it. Although a first reading contradicts this idea of globalization as a frame of reference, it is expressed in heterogeneous geographic realities, depending on the "where one stands" and specificities in which the meeting between the local and the global takes place (POLÈSE, 1998).

Finally, it is also important to stress that the discussion of development is influenced by the differing paradigmatic visions that these logics imply in themselves. If current modern societies are commonly said to be experiencing a period of instability or even crisis, it must be emphasised that among the factors from which the transitoriness and feelings of insecurity stem are the various perspectives that the actors/agents of development set in conflict (POTTER, 2004). The beginning of this century is also a period of conflictuality, of tensions between differing, and not always reconcilable, points of view. A discussion on the question of development thus means analysing the conflict among systems of values and ethical frameworks and diversified behaviours, whose interaction is often complex (FERNANDES, 2005 and SHIVA, 2000).

The concept of sustainable development was born and consolidated around dates like 1987 (with the publication of *Our Common Future*, known as the Brundtland Report), 1972, 1992 and 2002 in Johannesburg years in which significant conferences were held in Stockholm and Rio de Janeiro, respectively. It emerged as a panacea (note our emphasis) capable of bringing these different perspectives together. Contradicting the most avowedly conservationist position revealed in 1980 by the World Conservation Union strategy, an IUCN (International Union for the Conservation of Nature and Natural Resources) document, the strategy upheld in the Brundtland Report adopts a more realistic approach by also including the prospects for human societies to advance in the general direction of preservation of the planet. In effect, by reconciling the elements of profit, innovation and conservation in what is necessarily an unstable equilibrium, reducing assaults on the environment as far as possible, the question of sustainability also implies solidarity as a related concept. Solidarity is understood here to mean equity, between both the various sections of populations and the individuals of which they are composed, and among the current agents of development and future generations. These then attracts significant attention as it raises wide concern in the discussion of the viability of planet Earth, our common home of Humankind that is, of course, considered in its global sense and scale.

Society should aim for processes that are more diffuse and which respect the pride that populations take in their environment, rejecting short-term or selective materialism to bolster the post-materialist logic associated with behaviours and goals that can be assessed in the long term. Thus, after this process of *ecological transition*, *new forms of consuming the geographic space* may be designed, and different landscapes, other geographies, built (BALDWIN, 1994 and BAKER, 1997).

If the concept of sustainable development is a curb on consumerist and developmentalist dynamics (understood here to mean economic growth) of society, the economic dimension can nevertheless be taken as a relevant and essential framework, even though this more quantitative dimension may have two other elements added to it: The social and the ecological. The preservation of growth remains an aim, but with greater equity, in a framework of respect for the burden, limits and forces of regeneration of an ecological scenario that is ever more strategic.

Even though the concept of sustainable development through the equilibrium that it proclaims ought to be the guarantee of social peace and the convergence of interests that seem to be irreconcilable, its contemporaneity seems otherwise to us. The concrete application of the concept of sustainable development has not remedied the stress and fault lines (BAKER, 1997).

Maria da Graça Saraiva (1999) schematized these tensions in terms of a *continuum* between what the author called *Ecocentrism* and *Technocentrism*. The first expresses the ethical-philosophical and pragmatic postures centred on the ecological values of the countryside, and, at the other extreme, *Technocratism* unites the more materialist and confident postures in a technology that can solve the problems and weaken the negative externalities of an unbridled economic activity that is almost exclusively focused on the quest for material progress.

We see the complex social framework of post-modernity in the interplay and interaction between actors with differing conceptual postures, with respect both to development and to the relationship of Mankind and the Environment, which are at once the undeniable link between these two domains. Between those in favour of unlimited economic growth, the virtually unregulated exploitation of the ecological complex, and the more radical conservationists, here simplified and lumped together under the term 'deep ecologists', Saraiva refers to sub-groups, with postures somewhere in the middle. They are possibly more consensual, and generally aim to protect or conserve the ecological systems where economic activities have become established. In fact, without our advancing much in relation to this simplified scheme of reality, these different ethics reach, primarily, the various consumers and constructors of geographical spaces. They are expressed in different territorialities to the extent that they configure the actors in development with varying postures and ethical-philosophical settings (Figure 1), or with "(...) contradictory priorities", in the words of Dominique Dron (1998, p. 56). Downstream, all these tensions materialise in the landscape typologies that are thus going to be built and organised.

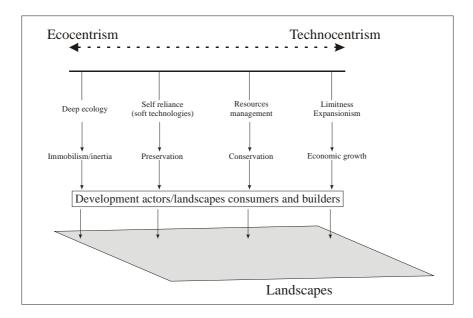


Figure 1 – The landscape as a setting for conflicts between different ethical-philosophical postures (adapted from SARAIVA, 1999).

The countryside stands out, therefore, as a frame of reference that reflects these differences, and in whose compass these tensions are materialised or play. Consideration of the topic of development and of the philosophies and ethics of Mankind's involvement with the Environment, and of the behavioural paradigms that result from those various conceptions, find an important analytical laboratory in the literal geographic territories in general, and in landscapes or environmental features/categories, in particular.

The landscape should be seen not as a homogeneous and stable framework, but rather as a dynamic scenario that reflects and symbolises the notions that give life to the different development agents who are, after all, all the citizens who consume and contribute towards the organisation of a given territory. This notion not only reaffirms landscapes

as pivotal objects in geographical science, but also underlines their importance as a framework for reflection within the question of development.

In spite of an increasingly widespread concern for the environment, these tensions express a deeper conflict between conservative attitudes and progressivist postures. Since it is hard to achieve a balance, the challenge of development is based on a reconciliation of the various dimensions presented here in a simplified manner, in the light of what the 21st century is bringing.

It is within this complex interplay between conservation, progress and development that networks of areas protected by special territorial planning projects are designed. Indeed, the demarcation of protected areas in the European context, for instance, was a response, no doubt to many local variations, to the need to weaken the effects of the destructive practices that were mainly legacies of the Industrial Revolution. However, when this institutional innovation was applied to fairly remote rural areas it frequently encountered Human Geographies that had been consolidated over centuries of permanency, and an artificialisation of landscapes that was sometimes intense. The same reality was replicated in other countries and continents, like Africa. Thus, the network of protected areas may serve as an excellent laboratory for approaching the complex interplay between the conservationist logic and the yearning for progress, as well as the subsequent tensions (GHIMIRE and PIMBERT, 2000).

2 - Protected Areas and Development

The theoretical approach of sustainable development is, more or less, well defined. However, the means, the instruments and the scales to reach that goal are still not clear enough and remain contested. The creation of protected areas, that is, spaces protected by special statutes that try to ensure the conservation/preservation of heritage goods and particular natural or manmade landscapes, is a worldwide phenomenon (FERNANDES, 2005). The world is nowadays covered by numerous grids of classified spaces, ordered by local, regional, national or, frequently, by global and transnational authorities. Consequently, each country seems a palette powdered by natural parks, national parks, reserves, or any other classified decree, either connected or not connected with global webs such as Ramsar Sites Network (created through the Convention of Wet Zones, in 1971), Biosphere Reserves Grid (formed by the UNESCO Man and Biosphere Project, in 1970) or the Global World Heritage sites list (which have been built after the World Heritage Convention, composed in 1972).

The creation of protected areas today is regarded as a novel device aimed at reaching sustainability, with respect to the way populations appropriate these territories or natural resources therein. However, in what sense are these protected areas profitable and/or useful as strategies to achieve sustainable development? Are those grids of boundaries adequate paths to reach human development and sustainability? This, then, is the main concern and problem that must be researched all over the world within very localised, small scale and comparative fieldwork, analysing conflicts between protected areas' authorities and local populations coupled with the examination of the contribution of these special classifications to local and non-local sustainable development.

So, tensions might create forced migrations outwards protected areas, when those legal institutions are not prepared to deal with people and open its management to a more

open structure. Consequently, forced migrations could be pushed by ecological degradation (just like we saw in the movie *The refugees of the blue planet*) but also by environmental protection instruments, like natural and national parks. In both cases, we are facing de-territorialization processes, that is, people who lose control and use their own territory (HAESBAERT, 2004).

In effect, protected areas are usually territories representing conflicting interests of: local populations and tourists, governmental agents and ecological non-governmental organizations, farmers and hunters, quarries explorers and academic researchers, and so on (FERNANDES and CARVALHO, 2003). As such, these actors do not act in harmony and agreement. This is why landscape is attracts conflicts as we said before in our introductory words. Should sustainable development overlook such conflicts or play a role in intervening between them? Are such disagreements unavoidable or, is cooperation a possible reality? If so, in what ways is such collaboration possible and, is sustainable development, therefore, synonymous to a broad fusion of interests and democracy and an improved quality of life? These are some of the key concerns.

On the other side, we now recognize that development strategies should follow quite a lot of propositions. First of all, these strategies consider long-term interests and the welfare of future generations. Secondly, development is launched by both top-bottom and, specially, bottom-top movements. Local population is also more and more involved in the definition of "their own present and future." Actually, the spread-effects thesis of development was well accepted in the past. According to it, development was the result of a spread diffusion of progress waves, scattered from an urban and/or industrial centre, to all peripheries or margins, supposed to reproduce the path and the order of this core. This was a direct trail to homogeneity. At the moment, we accept the so called *territorialistic* thesis of development: each population and territory, in spite of global common interests and purposes, like sustainability, could march its own individual way, with a development strategy adapted to local specificities and discussed by a wide range of actors, especially autochthonous people. This path should also be driven by environmental concerns, another key reference point that enshrines the idea of sustainable development. This is a way to ensure diversified futures in a harmonious world, an idea that should be one of the most important faces of sustainable development (SHIVA, 2000 and SIMON, 2006).

In another point of view, protected areas should be active instruments of 'territorialization', that is, according to Rogério Haesbaert (2004), a way to promote self-affirmation and empowerment, a Friedmann's (1997) word, and not a process of 'deterritorializing' less empowered people, especially those living is rural areas and surviving in direct contact with natural resources, as forests, fish crops, and agriculture soils. Following Haesbaert (2004), one of the main faces and testimonies of unequal development levels and power could be found in those 'deterritorialized' populations, that is, populations with less control of their traditional geographic space, with a reduced freedom in what respects their own territoriality. As Sen noted, that suatinable freedom and that wide range of options must be a part of all development paths (SEN, 2003).

Those next two case studies shall follow that point of view and show in what sense may protected areas be involved with both global and collective interests and local populations way of live, in two different countries and continents, Portugal and Kenya.

3 – Case Studies:

3.1 - Loriga and the Serra da Estrela Natural Park

Loriga (Photo 1) is located in the centre of Portugal in one of the most emblematic geomorphological areas of the country: The Serra da Estrela mountain, which is the biggest in inland Portugal, with 2000 meters height. Loriga is located right across a deep valley adjacent to the mountain and is 770 meters above sea level. With this location, Loriga presents a peculiar granite landscape of altitude and a sharp and undulating slope inclination.



Photo 1 – Loriga, a village inside the Portuguese Serra da Estrela Natural Park.

It has about 2000 inhabitants but in a decreasing dynamic, especially after the middle of the 20th Century. The population of Loriga participated in the European cycle of Portuguese emigration, a cycle that moved out an intense flux of emigrants from southern Europe to central and northern Europe during 60's and 70's (Figure 2).

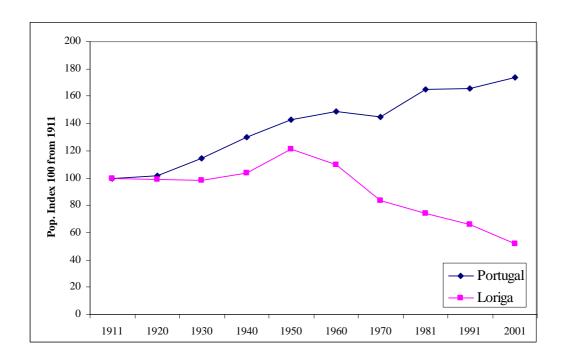


Figure 2 – Demographic evolution in Portugal and Loriga, from 1911 to 2001.

This decreasing demographic movement was the result of strong economic changes in Loriga. The dominant economic mainstay of its population manufacture of textile and wool, industrial sectors that were affected by strong competition from Asian countries in the current process of globalization. Loriga's population is still dependent on industries (metallurgy, service) and a few people are engaged in livestock breeding, a traditional activity in the midst of a looming economic crisis.

Loriga is, well, a village affected by the transition from the *fordist* context to the *post-fordist* social and economic environment, especially after 1960/70's. As such, Loriga is situated inside a Natural Park, Serra da Estrela Natural Park that was created in the 1970's and is the biggest (about 100 000 ha / 1000 km²) located near 200 km NE of Coimbra. The region is the highest point in inland Portugal and is a territory of beauty and granite stone landscape, a strong water reservoir, which is the most important glacier heritage in Portugal.

The landscape is one of the most important resources in this region but historic monuments such as roman bridges and roads, medieval castles) and local traditional food products, for example, cheese, honey, liquors and others are notable. Traditional shepherd dogs are an important tourist attraction in this mountain, sought after by urban populations who came from Lisbon, Porto and other major cities.

The above features are a attractive tourist destinations, especially important in a country deeply dependent to sun and coast tourism. Serra da Estrela is a unique Portuguese region with (non permanent) snow. This white landscape is an attractive landmark of Portuguese tourism. The last days of September, February and April (which are

holidays in Portugal) are the most poignant annual periods as the Serra da Estrela receives numerous visitors.

Nevertheless, fact observed in most interviews with local populations, those flows of tourists could be stronger if the natural park opened his restricted nature conservation politics.

As such, tourism is a potential economic activity but this Natural Park has a few serious problems that are acting as an impediment for its viability. Tourist-flows are intermittent, which means tourists do not spend much money especially in local products. According to most of enquiries to tourists, most of them spend money in local stores but only a few of those products are locally made, the major part are imported from outside, even from China and other Asiatic countries. In this particular point, we saw a strategic mistake: the promotion of local tourism is dangerously narrowed and linked to the snow, which activity is controlled by a private company. The marketing strategy should be more open to the wide heritage values that mountain present.

In addition, all tourist activities in the highest altitudes is now managed by one single private company (Turistrela), which is responsible for all the touristic activity managed above 800 meters of altitude (that encompasses about 30 000 ha). This private company aims are short-term economic profits and not regional development.

Population efflux also presents another significant problem and in addition to the ageing, which is a more general worry important not only Portuguese but also European populations but especially affecting rural regions. In fact, Loriga had in 2001 (date of last census) more than-

180 % of ageing index (population less 14 years old in relation with population above 65 years old) (Figure 3). By that year, Portuguese population had, average, 102 % (FERNANDES, 2006).

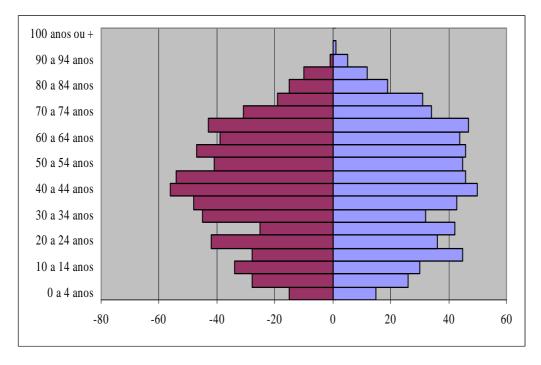


Figura 3 - Loriga Ageing structure (2001)

Forest fires are a constant annual headache and a calamity that has left indelible marks in most of the local landscape. Indeed, this problem affects other regions of the country. Between 1980-2005, 30 435 Km² of the Portuguese territory suffered from forest fires (almost 1/3 of the total surface of the country). The years 2003 and 2005 were the most catastrophic with more than 300 000 ha affected in both years (FERNANDES, 2006).

Portugal is not alone in this problem. In fact, all countries located in southern Europe have the same problem (Portugal, Spain, France, Italy and Greece). If we look at the percentage-contribution of each southern European country to the total burned area in this region (1980-2005), Spain leads but if we relate the total burned area with the total surface of each country, Portugal's forest fires emerge as the severest. As observed above, between 1980-2005, 30 435 Km² of the Portuguese territory suffered from forest fires (almost 1/3 of the total area of the country). This total number of burned areas is not shared or distributed across the country. In fact, a few areas burned twice or more in some occasions but the forest fires risk is mainly concentrated in the North and Centre Portugal, were forest areas are more continuous. Between 1999-2005, 17 845 ha burned (a total of 46 forest fires) in Loriga (more or less 50.8% of Loriga total surface have been affected by forest fires). The origins of this disaster are thought to be interplay of a wide array of factors. The Mediterranean climate (high temperatures with less atmospheric humidity throughout summer time) affects southern Europe but, in the Portuguese case, 27% of the causes are unknown. About 70% of forest fires have their origin in negligent behaviour or even criminal acts (psychological disturbed people, economic interests due to the strong industry of forest fires, wood enterprises). Actually, an on-going process of change that started in the middle of the 20th Century has paralleled forest fires (FERNANDES, 2006). That is, the strong urbanization and depopulation in most parts of rural forest areas in Portugal and other problems (like private forest and a non-autochthonous forest species with a high spread of Pinus pinaster and Eucaliptus globulos after the middle of the former century).

Our main focus and interest in the on-going study is whether the natural park (as an instrument of regional development) might change this historic trend and stem the process. Of course, this natural park is 30 years old and, within this period there is sufficient data contrary to our hypothesis in that this protected area has not been effective in changing these dynamics. However, it is important to note that with the formation of protected areas in Portugal, there was a marked disassociation and non-involvement by locals in most regions neighbouring them. This is perhaps because Portuguese protected areas are potential actors but with low economic and political power. As such, it may be said that they area weak actors in Portugal.

This characteristic is especially significant today with regard to current held notion or attitude of protected areas that changes depending on age-bracket of local populations:

- 1 <u>First Generation</u> attitude is that of "we must <u>identify</u> and enjoy the beauty and splendour of the natural and historic sites located in the 'natural' world!"
- 2 <u>Second Generation</u>: "we must <u>isolate and defend</u> the beauty and splendour of sites from the dangerous urban-industrial development process!"

3 <u>Third Generation</u>: "we must <u>integrate</u> this natural beauty within the need for human development. The urban-industrial social context is the key for future sustainable development. Protected areas are not isolated areas but territories with and for both natural and human life!"

The natural park can be an important economic driver in a region affected by a decreasing number and variety of industrial activities such as textile, agriculture and livestock keeping, which are on the decline. In fact, when demographic tendencies of Loriga are projected, we realize an accelerated process of depopulation.

We have made an attempt to project demographic changes by interviewing 100 Young students (13-15 years old) who are from the areas around or near the Park:

- <u>48%</u> referred forest fires as the most difficult problem in the Region
- <u>78%</u> indicated their intention to move out to other Portuguese regions (urban areas) or even to foreign countries, especially in Europe (France, Germany, Switzerland, England), following past emigration steps.

Even so, however, we are still engaged in a thoroughgoing analysis of this region and the whole natural park using, for instance, a SWOT matrix, a schematic point of view. Using this matrix, we hope to propose ways through which the natural park can have a direct and positive role to promote *strengths* and *opportunities* and as opposed to acting as a *weakness* and *threat*.

One of the purposes to Loriga could be the reactivation of a few textile industries but especially to attract tourism, that is what is happening is countries like Scotland (SILVA, 2006), with a profitable touristy attraction to old whiskey distilleries. In some cases, industries might not be lucrative in a context of international concurrence but it could have its own patrimony, a good potential for tourism. This could be one of the solutions to compensate the social problems caused after the closed of textiles, in Serra da Estrela and another regions of the country. In Loriga, one of the highest points of our work was a visit to an old already closed industry, plenty of rich patrimony inside that could be recovered. The SWOT analysis will take this idea in consideration. The Natural park, not only as a simple isolated institution to protect the environment but a more dynamic and engaged agent, could participate in this solution

3.2 Maasai Mau Forest Block of the Mau Forest Complex

With 400 000 ha, the Mau Forest Complex forms the single largest forest block in not only Kenya but also the largest forest block with a closed canopy in East Africa (Photo 2). The Mau Forest Complex is situated at $0^{0}30^{\circ}$ South, 35^{0} 20' East and is located in Rift Valley Province and cuts across at least five administrative districst: Narok, Nakuru, Kericho, Bomet and Transmara. Rainfall in the Western flanks is determined by moist monsoon winds from the Indian Ocean and dry winds from the Grreat Rift Valley. Mean annual Rainfall varies from 1 000-1 500 mm with peaks in April and August. Mean annual temperatures are between 12-16° C, with the greatest diurnal variation during the dry season. "Potential evapotranspiration on the Mau is estimated to vary between 1 400 mm in the higher and wetter areas to 1 800 mm in lower, drier

areas." Vegetation pattern is dictated by the altitudinal gradient and local topographical ecoclimes. In lower altitudes one finds closed canopy montain forests, which become increasingly intermixed with bamboo from 2 200 m onwards. Between 2 300 and 2 500 m pure bamboo (*Arundinaria alpina*) swards are found. Above 2 500 m this gives way to mixed bamboo/tree stands. At the highest altitude montane scerophyll forest is to be found.⁴



Photo 2 – A view of the Mau Complex Forest (Maasai Mau Forest Block).

Some of the forests that constitute this vast complex are Maasai Mau (46 278 ha), Eastern Mau (64 971 ha), Mau Narok (772 ha), South West Mau (83 395 ha), Western Mau (22 885 ha), Londiani (108 ha), Metkei (1 987 ha) Mt. Londiani (29 682 ha) Ol Posimoru (36 948 ha), Southern Mau (136 ha), Northern Tinderet (26 097 ha), Tinderet (27 870 ha), Lembus (12 276ha), Chemorogok (1 347 ha), Timboroa (5 891 ha), Nabkoi (3 014 ha) among others, which together the Complex the most important of the five water towers in Kenya providing the upper catchments of many major rivers including Nyando, Nzoia, Yala, Sondu, Mara, Kerio, Molo, Ewaso Ngiro, Njoro, Nderit, Makalia and Naishi. In turn, these rivers flow into some of the major Lakes in the Rift Valley among them Lk. Nakuru (a listed Ramsar site, hosts the largest flamingo population in the world and internationally recognized as an important wetland for waterfowl), Lk. Baringo, Lk. Bogoria, Lk. Natron (in neighbouring Tanzania and the only regular breeding site for more than 2 million flamingos in Rift Valley Lakes of Eastern Africa), Lk. Turkana (which borders Ethiopia to the North of the country) and Lake Victoria

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⁴ Excision and Settlement in the Mau Forest: Report of a Fact-finding Mission on the Status of the Eastern Mau Forest, Kenya Forest Working Group (KFWG), 2001; Jackson and McCarter, 1994 as cited by KFWG; also cited is a source, that cannot be indicated here as the information was provided in strict confidence with regard to the source (referred heretofore as *The Source*).

(that is shared between Uganda, Tanzania and Kenya and is the source of the Nile-the main lifeline of Egypt).⁵

By 1999, the gazetted (protected area of) Mau Forest Complex covered 360 000 ha, which is 25 % of Kenya's Forest Reserves and part of an estimated closed canopy forest total cover of 1.24 million ha or 2 % of the country. Since it establishment in 1964, the Complex has lost almost 34 000 ha, which represents 9 % of the originally gazetted area. As of February 2001 a total of 59 708 ha was set to be excised indifferent forest blocks of the forest. This, in addition to the establishment of plantations in the 1970s and clear-felling and burning among other numerous activities in the forest posing a threat to the integrity of the forest especially in the 1990s presents the Kenya Government, international environmental bodies and experts and other regional stake holders with a grave concern. Obliterating, catchment degradation and destructive activities continues unabated owing to population pressure in communities living around the Complex.

The adverse effects are such that flamingos in Lake Nakuru are infected by bacteria and are dying in great numbers due to receding waters. While six permanent rivers served the lake, these are now seasonal in turn affecting tourism. The Maasai Mara, which is the life-support of the wild in the Mara and Serengeti Game Reserves in Kenya and Tanzania, has also suffered a reduction in water volumes. In The Mau Narok Forest Complex where the Mara has its source, cultivation has gone up to its very headwaters but "for a very thin patch of forest" that remains. The formerly permanent River Njoro is now seasonal and Naishi dried-up due to forest destruction on the Mau escarpment. In addition, there has been massive siltation in these rivers as a result of agricultural activity upstream.

Thus, while most of the forest blocks of the Complex are gazetted (protected) and under management of the Forest Department they are constantly under pressure for local communities invading and exploiting forest resources, especially land for agricultural use.⁸ Others are managed by Local Government, for example, Maasai Mau Forest, which is managed by the Narok County Council as Trust Land. The Maasai Mau is one of the threatened forest blocks within the Mau Complex and formal complaint following public outcry about its destruction has already been made. Following various assessments by Public Complaints Committee and KFWG in 2003, one of the recommendations made is that all people settled in the area ought to be evicted and their land tilte deeds that were issued irregular be revoked and that no further excisions should commence. As a result, there has been wide hue and cry following evictions, most of which were carried out without due regard and respect of life and property. To further complicate the issue has been politicization of environmental conservation and protection, these land allocation and settlements having taken place in the last decade of the Kenya Africa National Union regime and benefiting ethnic groups not indigenous to Narok District (where Maasai Mau) is located. On the other hand, experts are torn right

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⁵ KWFG Report (2001, p.2 and The Source, p.9.

⁶ Citing (UNEP, 2001) The Source observes that against a global forest cover of 21.43 % and an average for Africa of 9.25%, Kenya's closed canopy forest cover stands at a critical 1.7 %.

⁷ KFWG (2001), Ibid, Pp.1 & 2.

⁸ The Mau Forest Complex is one of the only areas gazetted in Kenya that continues to be home of to indigenous forest dweller population, of Dorobos or Ogiek, an originally hunter-gatherer community that is now being forced to settle in forest adjacent areas-see KFWG (2001), p.3.

down the middle about how conservation and protection ought to be carried out with some calling for pro-people methods while others are strict conservationists envisaging methods that would shut-out local communities adjacent to the forest.

This then is the background against which we are asking ourselves the questions: Can there be a balance between environmental conservation and protection (management of natural resources) and human development? Is so, what would it consist of? Part of our research in Maasai Mau has involved the assessment of people's attitudes towards the forest (whether is a liability to them and/or to government). In the current state of uncertainty about the future, most people living in/or adjacent to the forest are apprehensive and think that the forest is a liability. A total 250 questionnaires were distributed to school students in seven schools near the Maasai Mau Forest Block, which was a replication of what was done in the Portuguese case study above.

90% of the students who filled the questionnaires thought that the creation of a protected area was a good thing for the local population pointing out the ecological and human significance of the forest. These students see the forest as an important water catchment area, a haven of biodiversity, a tourist attraction and a source of clean air but their support of its protection is because they also see it as a core life-support in terms of local livelihood. In their opinion, the forest is potential land for agriculture, harvesting timber for construction of houses, firewood and charcoal (fuel) and other human activities such as hunting and collection of herbal medicine. As such, the protection of the forest for these two reasons was coterminous and human settlement would not necessarily have to be a threat to long-term integrity and usefulness of the forest. Most of the other students, the remaining 10%, perceived protection of the forest as a direct threat to the local livelihoods of people living in and near the forest observing that it would mean scarcity of land. It can, therefore, be concluded that the wide support for environmental protection was supported in so far as it did not jeopardize human survival or development in and around Maasai Mau.

In view of past assessments of the tourism-potential of Maasai Mau as an alternative destination to Safari and Wildlife tourism in the Maasai Mara Game Reserve and Lake Nakuru National Park and our own on-going analysis using a SWOT matrix, we posit that Maasai Mau can support the livelihoods of adjacent communities sustainably and without posing a threat to its integrity, the complex ecosystem that it is a part of and biodiversity.

In summary of this formal final of the Project (*formal* because this is really only a short preview or beginning of the real work yet to start and continue) we must underline a few points:

A – First, which conclusions are we able to defend so far?

i. That Protected areas might be a way to promote local development as well as global ecological equilibrium. Rural areas have resources and the world is now linked as a whole. One of the weaknesses of current protected areas, in Portugal and Kenya, is a lack of acknowledgement of this fact. This is why in both countries the State is still making an option for 'isolated ecological islands' and not for 'ecological open corridors.' In spite of this, due to a European

- community project called 2000 Natural Net, Portugal is now preparing another net of protected areas, more integrated than the old system, most of them now classified again by the European Union.
- ii. As local development agents, protected areas could give the territory one strong positive image and work for what authors like Ward (2006) and Kotler *et al* (2003) call, respectively, *selling places* and *territorial marketing*.
- iii. One of the solution keys is management: The state has collective/overall responsibilities but this must be exercised with close reference to its societal obligation and thus decisions must be reached through wide consultation. Protected areas must follow a more complex management structure, with the intervention of a wider range of agents. With respect to the two case studies, Portugal and Kenya, this more true in the second and less in the first, with regard to the degree of centralization of management.
- iv. Development must be collectively discussed with a professional focus, involving local communities in the search of new resources and new adaptation to the global context.
- v. Location is a key element in this subject, so as development levels and inequalities also in development point of view. This was one of the strongest ideas after the comparison study we made. In Kenya and in Portugal we found centralized systems, especially in Kenya. In Portugal we have mechanisms of local participation but the real debate is very poor. Also in Portugal, the democratic revolution in 1974, and consequent development of local powers, and the adhesion to now called European Union, in 1986, and the consequent creation of local agents, were responsible for a more open system but, in spite of this, the future could be better and the centralization must be struggled with more energy. Especially in natural parks, even in Portugal the participation of local people is weak.
- vi. Natural parks and protected areas have different shapes and "personalities" or individual qualities worldwide. In Portugal, natural parks are weak institutions, with weak power. In Kenya we found stronger institutions, which served also to promote the dominion of the state in remote areas. So, in Kenya protected areas are key elements in the conservation of nature, tourism activities but also in geopolitical matters.
- vii. In those two examples, one with higher average human development, the other with less results in this respect, we found different problems. Migrations, in one case, are voluntary (in spite of being inevitable due to overbearing international economic forces, i.e., growing marketization of the rural economy) and, in another one, forced. In one case, the problem is the unemployment; in the second one we found problems with elementary survival. We have a unique but fragmented and unequal world. An important observation is that globalisation seems to have compressed/shrunk the world while the emerging global system made deep fractures in the world social structure. As a result, there is a lot to do to solve problems like the de-territorialization processes going on in the two case studies and other similar territories across the globe.

With the presentation and discussion of those two case studies, we have shown in what sense the same development strategy (protected areas) could in the certain ways, reach different results and, in another perspective, could be a lost opportunity for local development. In the Kenyan case, the rapid creation of the protected area (the Mau Complex Forest Reserve), shows how protected areas could be designated and established without local community participation. The frequent evictions experienced in this case were real cases of local population's 'deterritorialization' with costs in what respects human rights and well-being features. In the Portuguese case, the natural park was not in itself responsible for the 'deterritorialization' of local people or the sense of marginalization perceived especially by young residents. Nevertheless, the protected area could not prevent the 'deterritorialization' characterised by the crisis observed in traditional local activities due to global economic forces and competition, which are a manifestation of globalization. However, in both cases, protected areas have a potential for human development, if there are seen and utilized as instruments for sustainable well-being, using the natural resources as a way to, simultaneously, promote, equally, economic profits and landscape preservation. Imagination, institution, innovation and local-regional-national dialogue must be the rule. Local communities could be, and indeed, are the best stewards of nature wardens if they perceive, feel and experience sustainability as a 'territorializing' and economically rewarding process, and not the reverse. This can be realized only if, in the Kenyan case, the protected area authorities start a dialogue with local agents and, in the Portuguese case, if the protected area emerges from the economic invisibility that shrouds it.

Environmental protection and management is not static but an ongoing process and as people, protection agents and local communities engage in dialogue, and natural and social science academics provide the necessary theoretical and practical knowledge background, both cases, and protected areas in general, yet hold the promise and a hope for the future as we seek innovative strategies for sustainable balance between environmental conservation and human development.

B – The Future of this project: which outputs are we preparing right now?

- a) The final work will be gathered in a comprehensive book of about 250 pages, with a plan/chapter outline close to the one we presented in our project proposal for the JIP award. This book will be enriched with all cartography and statistic treatment of data, interviews and enquiries, from Kenya and Portugal. This work will analyse more closely and compare those two case studies, which is only possible after treatment of all material gathered in the course of this year (2007).
- b) A specific work on environmentally displaced populations-EDPs- (we have in mind a book around 100 pages).
- c) Make more concise texts and publications to present in congresses and try publications in international refereed scientific reviews.
- d) The final edition of the documentary, after rigorous preparation and interpretation of all the raw material whose quantity collected exceeded what

we expected in the beginning (25 hours of raw video footage to be edited into a one and half hour documentary).

e) This is an academic engagement. However, we are aware of its social implications. One of the main purposes is the dissemination and diffusion of final conclusions after total treatment of the entire material/documents we have in our hands. Contacts again with local authorities, a few operative purposes and a strategic planning for each study area are in also uppermost our mind.

C – Finally, which human lessons really enriched us?

This last year of work meant a strong human and affective importance. Our personal lives were enriched. These last 12 months have been marked by a permanent bridge between Kenya and Portugal with punctuated by equally important contacts with Tokyo. This work involved a wide group of people, especially young students who were kept motivated by field excursions. We had people helping us with the documentary shootings, youngsters helping us with the interviews and enquires and others working in Nairobi before and during the workshop. With this project, our personal lives became bigger because we opened ourselves to new places, new cultures, new people and friendships, impossible to reach without the JIP. The significance of trips and journeys even inside our own countries were also stressed and developed. Each one of us discovered a new country but also discovered new faces and perspectives of their own country and people. We had to face and overcome language barriers as well as cultural and personality differences but, at the end, we have learnt and known each other better and discovered our deeper selves. In summary, this has been an unwinding road of personal development, academic, intellectual, practical and cultural. It is heartening to know that it is the beginning of an even more exciting road ahead.

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