Verifier's Report to the Evaluation Committee

Name of protected area: Gata-Malcata/ "Terras do Lince" (/Land of the Lynx)

Name of verifier: Fernando Correia

Date of submission of application by protected area: received by verifier on 8th March 2016

Date of verification visit: 23 & 24th of May, 2016

Date of completion of this report: 30th of June 2016

NOTES FOR THE VERIFIER

Where [ ] **is shown, verifiers are asked to indicate a score, using the following system:**

X Not relevant
0 Not happening
1 Weak – little action
2 Moderate – action happening in this area, sufficient at present
3 Good – significant action, totally satisfactory

A star ***** may be added to a "3" score to indicate an excellent example of best practice (3*).

Verifiers are asked to comment on individual questions to provide further information or explanation, keeping their answers concise. In particular, the reasons for any score under 2 should be briefly explained, highlighting any particular causes for concern.

The reasons for any score of * awarded should also be explained: what makes this an example of best practice? The star should be used sparingly, and only for outstanding initiatives or actions which can serve as models at the European level.

The format for this verifier's report is linked closely to that of the Application Report completed by the protected area. You should have received the Application Report in electronic format. You may copy information from the Application Report into this report to support particular answers where this is helpful.

If you do this, we would ask you to underline indicate very clearly (e.g. by use of a different typeface, highlighting, etc.) the text which has been copied from the Application Report.

Your own observations relating to the information provided by the protected area and gained on site are, of course, particularly important – the Committee will have the full Application Report available to refer to as necessary.

Please attach a list of any documents received from the protected area or presented during the visit which were not included in the original application.

Programme of visit, key sites and partners visited:
Please attach a full list of people interviewed and job titles as an appendix

 Please see Appendix A at end of report.

Overall Impressions

<u>Some useful background information about the application's title and areas concerned:</u>
 "Serra da Malcata" (or commonly just Malcata) is the name of a Portuguese mountainous Nature Reserve in the centre region of Portugal, bordering with Spain. The name "Malcata" is strongly associated with the Iberian Lynx in Portugal, as the Nature Reserve was created in the early 80s as an outcome of one of the strongest national conservation campaigns ever in the country, aimed at saving the species from extinction. The region was one of the last refuges of the national Lynx population. Unfortunately, the Lynx has since became extinct in the region (and Portugal), but in the national psyche there continues to be strong association of the name Malcata with the feline - hence the suffix "Land of the Lynx" on this application. The species became in effect a symbol of the area, and it is not uncommon to find images of it as part of the branding of local businesses, products, etc.
"Gata-Malcata" in turn, is a designation once used to name the cross-border geographic area that includes the Portuguese municipalities of Sabugal and Penamacor, and the Spanish "Mancomunidades" of Alto Agueda and Sierra de Gata. The two regions have traditional links and a history of cooperation, and the original intention was to submit this application jointly as a trans-border process. I was explained during the visit (and it is also documented in the application), that the trans-border application goal was postponed during the application development process, as the Spanish partners needed more time to develop the necessary groundwork and organizational supporting structure for it. Nonetheless, the two Mancomunidades signed commitment letters "authorizing the use of the name "Gata-Malcata" in this application, confirming the will to submit a joint Charter application in 2020 (copies of such letters were included in the application dossier). A number of supporting actions of the current Action Plan relate to preparation for such.

The final Charter Application Area submitted refers to the full territory of the three Portuguese border municipalities of Penamacor, Sabugal and Almeida, with a total of 190.429 ha (Portuguese municipalities are normally large administrative areas). These include the following classified areas:
-   The Malcata Nature Reserve (16.129 ha, IUCN Category I), crossing the municipalities of Penamacor and Sabugal
-   The Malcata Zone of Special Protection and Natura 2000 Site (79.079 ha, IUCN Category IV). This fully includes the Nature Reserve but extends significantly beyond it crossing the three municipalities.
-   Part of the Geopark Naturtejo Meseta Meridional (member of the UNESCO Geoparks' network). Only the municipality of Penamacor is part of it. It wouldn't make sense to have the full Geopark included, as its full geographical area covers a vast 4617 km^2 area extending well into the south. However, its management organization is an active partner in this application supporting several actions related to its remit.

The only common Natural Area that crosses the full territory is therefore the Natura 2000 Malcata Site, although the natural "ex-libris" of the region is the more strictly protected Malcata Nature Reserve.
If we exclude the Geopark (which follows a different conservation status and model), around 41% of the Charter Area has a regulated nature conservation status, corresponding to the full Natura 2000 Malcata site (20% of it being the Nature Reserve). Both the Reserve and Natura 2000 sites are classified because of their natural and seminatural mosaic landscapes of Mediterranean forests and shrublands, grasslands, native forests, softwood plantations and riparian corridors that support a rich biodiversity. The richness of this mosaic landscape is very evident when travelling through the region, and provides a refreshing contrast to other rural or mountain regions in Portugal that are currently covered in extensive monocultures of eucalyptus and other fast-growing softwoods for industrial purposes. Although the Lynx is currently extinct here, a key management aim of these areas is to create the conditions for its reintroduction in the medium / long term.

<u>Some key points and overall impressions:</u>
This is an area of significantly low population density (12.5 p/km2, compared to 113.7p/km2 as national average), with related important socio-economic problems of strong depopulation trends and

accelerated ageing. The population of the full area in the last census of 2013 was 23.866, which was a drop of around 31% in 25 years. Almost 40% of the population is over 65 years, with only 15% under 24. From speaking with the Mayors of the municipalities, the real concerns about the future of region were very obvious.

On the other hand, the strong support for the Charter application from all three municipalities was also very evident throughout the visit, as it is seen as a helpful instrument to help them in their efforts to revert the fortunes of the region. Not surprisingly, many of the partners in the application are public and third-sector organizations with a strong remit in supporting local/regional development, to compensate for the weak private sector and/or help it grow or improve. I have met many of these partners (see appendix A) and had the opportunity to check many of their previous and current initiatives, both online and on the ground, and was left with a very positive impression of their efforts and previous experience. This provided reassurance that the project presented is well served in terms of its stakeholders' partnership, as well as reassurance in terms of implementation capacity.

Tourism-wise, this is far from a mature (or even growing) destination. According to the regional estimates presented in the documentation, numbers have actually been going down over the past years. The region contains the main road border crossing between Portugal and Spain (in terms of passing numbers), but is used mostly as a transit area, rather than end destination. It is a relatively unknown region in the foreign market, the vast majority of visitors are nationals, and many of these are actually yearly returning emigrants over the holiday season. Across the whole territory, available beds less than 700 and occupancy rates are low. The Diagnostic report presented recognizes that this number is more than sufficient for the low levels of demand, and in fact the strategy contains no plans to increase this in any relevant way.

The overall impression is then that this is a territory of extremely low population density, rich mosaic landscape, and low demand and tourism pressure with the odd exception in terms of specific events, festivities or places (like the walled town of Almeida), but such pressures are usually in its (small) population centres, rather than natural areas. Unsurprisingly, the strategy presented selects as key differentiation themes: a) its borderland context (and associated history, culture and traditions); b) the vast landscapes; and c) its emptiness... It is telling that during the visitation to the Malcata Nature Reserve, the staff that accompanied me acknowledged that if anything they wouldn't mind having more requests of visitation (organized groups need permits), as it would be good if more people knew and appreciated the area.

Comments on the application from the protected area and evaluation visit:

A very complete application dossier was submitted, with separate documents for the Application Report, Characterization and Diagnostic Report, Strategy & Objectives, Action Plan, maps and annexes. The latter included examples of several promotional and informational materials of key resources in the area, past and current tourism projects, routes; copies of the management plans of the classified areas and regional development plans; attendance records of over 30 meetings (with pictures of the meetings, powerpoints used, reports, etc); copies of news pieces in the media where the application process and meetings were discussed; copies of all cooperation protocols signed between the partners, and several other reports and documentation related to regional resources and/or partners. Overall then, the documentation evidenced that a comprehensive effort was done to put this application together and involve a wide range of stakeholders in the process.

The visit itself went out without any major issues. I was received on the evening of Sunday 22nd May by Mr. Antonio Cabanas, the ICNF's senior officer and key institutional liaison contact for this application, as well as Penamacor'sCouncillor Ms. Ilídia Cruchinho. ICNF (Institute for Nature Conservation and Forests) is the national government agency managing protected areas in the country and forestry matters. For the following two days I was accompanied on all visits by Mr. Cabanas as well as by a team of representatives from ICNF, the three municipalities and the Association "Territorios do Coa" (beyond all the other individual stakeholders met at separate meetings). The reason those four partner organizations followed the whole evaluation visit is down to the fact that this is in fact an application made jointly by those four partners. Due to current lack of resources from ICNF, a cooperation protocol was signed between it and the three municipalities for the latter to support with technical and financial resources the application process (see point 2.2. for more details on this), and for the Association "Territorios do Coa" to manage the strategy's secretariat, admin and partners' coordination for actions' implementation.

As for the programme of the visit, I have asked the partners to provide an overview of both the strengths of the area but also the weaknesses/problems the strategy was trying to address. As it can be seen by Appendix A, a very comprehensive programme was organized that allowed an overview of the whole territory and partners' efforts in the strategy.

Verifier's assessment

Overall comment on the sustainable tourism strategy and action of the protected area and how it relates to the European Charter:

The strategy presented was the outcome of significant bottom-up consultation work (see full details in sections 1 and 2), that has used the Charter's principles as a structuring framework. At the beginning of the process the Charter's 12 principles were converted into seven parameters and stakeholders in a forum were asked to do a SWOT for the territory for each of those seven parameters. This was then followed-up by rounds of consultation with public, private and third-sector stakeholders to identify possible "lines of action" to address the SWOTs' results. Finally, in a separate forum, stakeholders were asked to rank the suggested lines of action by perceived importance and feasibility over 5 years. The results were then structured and presented in the final strategy in a layered (but somewhat complex) rationale, from a definition of background identity factors to operational objectives.

As mentioned before, the strategy starts from three distinctive USP themes: a) the borderland context (and associated history, culture and traditions); b) the vast landscapes; and c) its "emptiness". Three strategic "products" were then identified to organize and develop offer around those background themes. These were: 1) colourful landscapes (reflecting the mosaic landscape and its many changing colours through the seasons); 2) "borderland memories" (drawing from the long history of the region, considered to be "the oldest border in Europe", and its more recent history in the national conservationist movement with the Lynx campaign in the late 70s); and 3) "borderland livelihoods" (the local ethnographic, cultural and religious traditions, events, gastronomy, etc).

This is then followed by four "pillars" to structure the strategy and action plan around operational objectives, namely:

- "I - Territorial Identity – to consolidate the territorial identity of the Gata-Malcata / Land of the Lynx as a Nature Tourism destination
- II – Visual Identity – to consolidate the image of the designation "Gata-Malcata / Land of the Lynx" and promote the territory;
- III – Knowledge- to produce and provide information on and for the territory and promote the training of human resources in the tourism sector;
- IV – Organization – to organize and sell the tourist offer of the territory. "

The first two objectives are effectively about creating a new sense of place and destination almost "from scratch" around the municipalities common natural spaces and history. Although geographically and culturally contiguous, the three counties belong to different regional administrative regions and have little history of cooperation, particularly between the two ends and especially for tourism/promotional purposes. The latter two objectives are self-explanatory. Over 50 actions are then presented (many with several sub-actions) around these four objectives, each with a comprehensive "action file" that makes explicit what principle(s) of the Charter that action addresses, delivery partners, expected annual budget, budget sources, indicators and expected outcomes, etc. There was then a concern throughout, from identification of issues to final presentation of actions to structure the process around the Charter's principles as a structuring framework.

Main strengths:

Commitment of partnership and consultation process
I was positively impressed by the commitment of all key parties, and their level of keenness. The three Mayors contacted are fully behind the project, and it was very good to see they were willing to "walk the talk" and provide the financial and technical resources that ICNF could not. That all such commitments were formalized through signed protocols is a very good indicator that the whole process was being taken very seriously. The overall consultation and engagement process was very thorough, and the resulting range of 22 organizations making up its Technical Project Team (see point 1.1) as well as number of lead promoters of actions is also of praise.

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Experience of key partners and focus on exploration of synergies
The partnership is very well served in terms of supporting organizations, and several are very experienced in the delivery of regional development projects built around tourism-related initiatives, like the Associations Territorios do Coa and Historical Villages of Portugal (I was shown several good examples of previous and current projects from these organizations). This provides strong reassurance that there is capacity in the territory to deliver. Adding to this the commitment of local private companies (including a passenger transport company with very clear ideas of its role in supporting the region and this strategy); the commitment from the government's Regional Tourism Agency to support the promotion and image building of this "new destination"; partnerships with Universities, business associations, local schools, etc., then all the key pieces are in place to make this a successful initiative. The proposed strategy has several good examples of actions that have their strength on the collaboration of different partners. A simple but very good example I was shown was the collaboration between restaurant(s) and a local College to develop the concept of "foraging" with visitors for a new local gastronomy offer. In this case, visitors participate in a short tour to learn about local wild herbs with a local chef, and then enjoy new creative dishes produced with those, made by students of a local training college, learning about the trade and the local flora simultaneously.

The low population density, low visitor pressure and consequent "natural experience" of the region
This can seem paradoxical, as the lowering of population numbers is also one of the key problems of the region. Local stakeholders understandably aim with this strategy to raise the profile of the area, secure a sustainable visitation supply, and help stall populational and socio-economic decline. However, they were also quick to realize that because of its depopulation the region can now provide a sense of remoteness and a 'wilderness' experience that many other areas in Portugal lack (including other Protected Areas). In fact, wilderness tourism is an area identified in the Diagnosis report as highly promising here. This will need careful planning to be successful, but what some consider a regional weakness can be seen in this case as a strength and important attractiveness factor for nature-focused tourism and tourists.

Main weaknesses:

Poor understanding of demand factors and tourists' needs:
This was a weakness identified by the partners themselves in their Diagnostic Report. The data presented regarding tourist numbers was fairly incomplete relying mostly on proxies from visitor centres (see section 2.11 for more detail, though everyone agrees visitor pressure is very low). However, the report and stakeholders seem to be focusing excessively on understanding quantitative data alone (including on future plans), with less attention to qualitative information and trying to get a better understanding of visitors' needs – e.g. what they want, what they value, why they visit the area, why not, why this area instead of others, what would make them want to come, what they need when they're there, what they would like to see improved, etc… Because of such poor understanding local stakeholders can easily fall into the trap of confusing local preferences (likes/dislikes) with the tourists' ones. A simple example of such is the quick dismissal by local actors of the needs of any eventual vegetarian tourists. Because this is basically a non-existing practice locally, there is a tendency to see it more as a curiosity rather than something that can be pro-actively planned for. But given that this is a strategy aimed at nature-based tourism, it is not unreasonable to expect that this is a need that could be more prevalent in those segments (versus more traditional tourism forms the region has attracted so far). This is a simple example, but there is an overall impression that the strategy presented is too inward-looking or "push/offer-driven", with much less attention paid to pull/demand factors.

Unclear/undefined common identity:
This is another weakness also identified by the partners themselves (and still somewhat unresolved by the conversations had during my visit). Ironically, the problem is not lack of ideas but too many angles that in the end somewhat dilute the focus of the project. For instance, the proposed title of the project/destination is Gata-Malcata (but the Spanish "Gata" territory is not a partner here) as well as Land of the Lynx (but this is extinct in the area); the suggested themes of focus are on landscape features like its changing colours, vastness, etc., but then much of the content and focus of actions is

on the "borderland" history and traditions of the region, its smuggling past, etc. (And to confound things, the majority of current Charter Areas in Portugal are also in border areas with Spain, so this particular angle is also hardly a strong differentiating identity factor…).

The unclear focus is sometimes also aggravated by some of the key partners having a wider territorial remit than the Charter area, with many of the strengths and initiatives currently happening in the regions being part of wider projects that go way beyond it (like the Historical Villages initiative or the range of projects in the Vale of Coa). To be fair, the strategy does put strengthening/developing of a common identity as its first pillar to work on. However, the crux and coherence of this application was that it was developed around the common Natura 2000 Malcata site that crosses the three municipalities, but sometimes this key asset that links the whole territory ends up being somewhat lost in the strategy/action plan presented. This leads to the next 'weakness' point.

Little emphasis on the Natura 2000 "Malcata" Site

This is perhaps not very surprising, as the site has no direct central management structure (it's regulatory plan is enforced by the municipalities). It is also extremely likely that the vast majority of the population doesn't even know of its existence (unlike the case of the Malcata Nature Reserve, for instance). Often the strategy reads like a joint project from three rural municipalities wanting to work together on tourism, but that simply happen to have a common classified area crossing them. In a scenario were this same area happened to be classified as a Natural Park or other, surely it would play centre stage on the whole strategy. At the moment though, it often appears more as a background circumstance/context rather than a key foreground feature. Stakeholders are rightly proud of their shared historical and cultural heritage, but often the strategy seems clearer on how these resources are planned to be used, rather than the rich natural and conservation values of the wider N2000 site. If the smaller area of the more "famous" Malcata Nature Reserve was to be eliminated from the picture, then much of what was presented would probably not be very different from other tourism strategies for generic rural/countryside regions without any formal nature conservation area. This doesn't need to be so, and much more in-depth exploration could have been made of the potential of the shared N2000 Site as the backbone of a regional, nature-based (and conservation-supporting) tourism strategy.

Conclusions and recommendations for the protected area:

Raise the profile of the shared Natura 2000 "Malcata" Site and bring it front stage in the strategy

As a way to respond to the weaknesses identified above, doing so should also greatly help resolve the identified problem of lack of common identity (at least for nature tourism purposes). It is important to reinforce to local stakeholders and visitors that the area has high aims to be recognized as an area of excellence in Sust. Tourism in *Protected Areas*, and not just high aims in Sust. Tourism generally. So if this is the only shared classified area common to the whole territory, then its importance should be brought forward more forcefully.

Make a strong bet on the environmental interpretation and sustainable enjoyment of the Natura 2000 site

Key assets like the Geopark sites or Malcata Nature Reserve have these aspects assured as they have dedicated management structures, but the same doesn't happen with the N2000 site. ICNF can have a key role in supporting local municipalities develop a pro-active sustainable use and interpretation strategy for the site, using their experience from their work in classified areas across the country. The very fact that both the Nature Reserve and wider N2000 site share the same "Malcata" name constitutes a great opportunity for a well developed wider educational/communication strategy. The Reserve is understandably subject to much stronger restrictions given its IUCN Cat.I status, so focusing attention on the N2000 site can allow for alternative, more creative and wider visitor engagement approaches that can help contribute to public appreciation of the natural values of the region.

Raise the priority and importance levels of the proposed "Charter of Nature Tourism Activities in Gata-Malcata"

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This is a proposed action in the Action Plan (action III.34), and this recommendation is also directly linked to the two above. Partners propose to jointly develop what is effectively a Visitation Management Plan for the wider Charter Area, covering aspects like definition of appropriate nature-based tourism activities for different sites in the region according to their natural sensitivities, setting regulations for those, defining appropriate times, seasons, etc, and incorporate such Charter on the municipal plans. This is a welcomed move, that will help reinforce the points above and help support a much better managed approach to the wider RN2000 site, as it currently only happens in the Nature Reserve. As an example of its operational value, an incoming nature-based tourism company operating in the region met during the visit also called for a plan of the kind, so they could know in advance what could be done responsibly where in the territory, for their offer development. However, strangely in the Action Plan this action appears with a low priority level with expected completion only in 2018, whilst other actions about developing concrete offer of activities (including biking and mountain biking routes, walking routes, birdwatching, interpretation tours, publishing of guides, communication materials, etc) have a planned immediate start from 2016. One would assume that the logical way should be the other way round, and it should be agreed Nature Tourism Visitation Plan to inform the subsequent development of related offer, communication materials, etc.

Highlight more strongly the interconnections between the natural, cultural and historical heritage
As mentioned before, stakeholders/partners are rightly proud of their rich "borderland" historical and cultural heritage, and many actions were proposed to develop interpretation and offer around it. However, there are potential interesting opportunities to also use the interpretation of such heritage in a synergistic way with the natural interpretation of the region. My perception was that the two still tended to be treated or approached (for tourism purposes) on a fairly compartmentalized way. This makes sense up to a point, as there can be different types of tourists for those types of heritage or resources. But I didn't came across any strong efforts (in the ground or on the strategy) to explore in a strongly explicit way the close links between those two, though this could have a strong pedagogical/educational value. For instance, there was a clear role of the landscape as an active actor in the border defence of the country just as there was in the smuggling activities of recent past. Or more currently, the links between depopulation trends and consequent landscape changes, or conversely the landscape-related livelihood hardships versus the socio-demographic changes. Those might be obvious for the locals, but they could constitute prime nature-focused interpretation opportunities for the visitors, beyond the more common habitat/species typical information materials. Stressing further the mutual co-evolution and co-dependency of man and nature in the region could provide great opportunities for enhancing nature's appreciation by both locals and visitors and help further advance the aims of the Charter (and again, reinforce further the strategy's focus as one aiming to develop appreciation of Protected Areas, rather than mainly a rural/cultural tourism focus). Some of the project partners (e.g. Historical Villages and Geopark) are well experienced in doing such type of nature/culture interpretation and can be a good resource to help the others develop this aspect.

Manage the "Lynx expectations" carefully and make stronger educational opportunities out of planned interventions
Even though the species is now extinct here, for most people in Portugal the name Malcata is synonym with Lynx. Locals are all too aware that it was the Lynx that put the region "on the map", and rather than any antagonism there is a genuine will to have the species back. This however will be a long process, mainly dependent on getting rabbit populations back to strong healthy levels, before any reintroduction attempt (a sequence of viral epidemics in recent years plus widespread land use changes have been wiping rabbit populations in Portugal). There is a joint Portuguese-Spanish project to reintroduce Lynx in Portugal, but the first areas to receive it are in the South of the country (with healthy rabbit numbers), rather than here. The reasons for it are complex, and need to involve strong educational/interpretation efforts to visitors (and locals) on why it is so, and what strategies are being put in place to address it. I have met the Portuguese manager of the Iberlynx project, who explained in detail the plans for future reintroduction (in 2020), the intermediate actions necessary, and the polemics these can (and have) generated, like the use of cynegetic tourism as a management support tool to bring back healthy rabbit population numbers. Although this can seem counter-intuitive, the first areas in Portugal to have Lynx reintroduced are precisely hunting reserves, as these have been very effective in maintaining strong rabbit populations. So, ironically, currently the "Land of the Lynx" has no Lynx (and will take years to do so,), but other regions in Portugal do. Furthermore, the methods to support reintroduction can potentially antagonize some types of nature tourist, unless strong

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communication efforts are done to explain the management actions behind it. This will all need very careful educational and communication expertise to manage public perceptions, so partners are strongly recommended to make such a top priority. The Action Plan contains two dedicated actions around the Lynx reintroduction issues, involving close collaboration between conservation bodies and municipalities. I would strongly recommend working on these issues also with the educational partners in the project (Universities and others) who could contribute with relevant expertise on the development of a communication and educational strategy around it, involving visitors and locals, schools and tourism businesses, etc.

Make knowing your visitors a priority
Finally, going back to the first weakness identified earlier, it is recommended that the partners give higher priority to the qualitative understanding of visitors and their needs. The proposed action to collect visitor data has a "low priority" specific in the plan, and stresses mostly collection of quantitative data. Just like the proposed "Charter of Nature Tourism Activities" above, this is an action that should be developed "prior" to strong investment and development of offer, as better understanding visitors' needs should also help develop better quality offer. The same could be said for its relationship with the proposed "training actions" for local tourism businesses, which should equally be informed by the results of such visitor understanding.

Recommendation on award of the Charter:

This is a typical "first Charter" application, laying the key foundations, partnership structure and keystone actions that will allow a continuous improvement process towards more sustainable tourism forms in the region. I was particularly impressed with the comprehensive consultation process developed, joint identification of issues and priorities by a wide range of stakeholders, and the bottom-up way the proposed actions and strategy were developed. I therefore have no problems in recommending the award of the Charter to this area.

Please check one box

☒ **I recommend that the protected area receive the award of the Charter.**

☐ **I do not recommend that the protected area receive the award of the Charter.**

In order to put a cross in the relevant box, please double click on the box you want to mark. A dialogue box "Check Box Form Field Option" should open. Click under "Default Value" where it says "Checked", then OK, and the proper box should have a cross in it.

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General information about the protected area –
Section A of Application Report

I. **Has full and clear factual information been supplied by the protected area in answer to sections A1 – A14 of the Application Report framework?** `2`

Mostly yes, but see below and Appendix B.

II. **Additional/amended information not contained in protected area's application:**

Some points had somewhat incomplete information and/or information related only to the Malcata Nature Reserve (the only ICNF managed area in the Charter Area) and not the other classified sites. I have asked ICNF (the application lead proponent) for further information/clarifications on these, and the additional information provided is presented in Appendix B at the end of this report.

III. **Any information not available, and reasons for this:**

The only information not available is the budget of the Malcata Nature Reserved (as asked in the report) due the centralized structure of ICNF that makes it unfeasible to calculate this. Appendix B contains further clarification on the reasons for such, provided by ICNF staff.

IV. **Are you satisfied that the information supplied is accurate?** `3`

Yes.

V. **Are there any factual issues that might affect the eligibility of the protected area for award of the Charter?**

No.

Meeting the Charter principles - **Section B of Application Report**

Note: Areas in **grey shading** *indicate particularly important points which are critical for successful evaluation. They correspond to the shaded areas in the Application Report. <u>NEVER type within the shaded area, except the score</u>, please.*

Principle 1 – Partnership with local tourism stakeholders

1.1 Has a forum or other partnership structure been established to enable the protected-area authority to work with others on the development and management of tourism, including implementation and review of the strategy?

3

Briefly describe this structure, including size and membership, frequency of meetings, etc.:

The partnership defined follows a similar two-tiered structure to the one used at other Charter Areas in Portugal, namely:

- A Technical Project Team (TPT) – this is an inter-institutional team bringing together technical staff from most of the organizations leading or collaborating in actions in the Action Plan.
- A Sustainable Tourism Permanent Forum (STPF) – this is a more informal consultative platform, open to the participation of any interested stakeholders.

The TPT is mostly composed of technical staff from 22 partner organizations. These represent either local organizations or wider regional institutions with their remit covering the Charter Area. The table below is copied from the application and lists the 22 member organizations and representative staff that comprises the TPT. I had the chance to meet in person the majority of the individuals listed during the verification visit.

Nº	Organization	Name
01	Instituto de Conservação da Natureza e das Florestas	António Cabanas Laura Saloio Manuela Fernandes
02	Câmara Municipal de Almeida	João Marujo
03	Câmara Municipal de Sabugal	Cláudia Quelhas Telmo Salgado
04	Câmara Municipal de Penamacor	Raquel Marques
05	Agência de Desenvolvimento para a Sociedade de Informação e do Conhecimento - ADSI	Patrícia Correia
06	Aldeias Históricas de Portugal - Associação de Desenvolvimento Turístico	Dalila Dias
07	Associação de Empresários da Região da Guarda	Paulo Logrado
08	Associação Empresarial do Sabugal - ADES	Daniel Simão Jorge Esteves
09	Associação Empresarial da Beira Baixa - AEBB	Sónia Azevedo Maria Carlos Santos
10	Comissão de Coordenação e Desenvolvimento Regional do Centro	João Casaleiro
11	Diputación de Salamanca	Agustín Caballero José L. Gómez Crego
12	Direção Regional de Agricultura e Pescas do Centro – DRAP-C	Fernando Martins
13	Fórum Florestal	Hugo Joia
14	Fundación Naturaleza y Hombre	Ángel Fernández Argüedes
15	Instituto Politécnico de Castelo Branco	Domingos Santos George Ramos
16	Instituto Politécnico da Guarda	Gonçalo Fernandes
17	MEIMOACOOP - Cooperativa Agrícola de Desenvolvimento Rural e Solidariedade, CRL	Rogério Pires Carina Costa
18	Pro-Raia-Associação Desenvolvimento Integrado Da Raia Centro Norte	Paulo Marques
19	Territórios do Côa - Associação de Desenvolvimento Regional	Dulcineia Moura
20	Turismo Centro de Portugal, E.R.	Carla Basílio

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21	Universidade da Beira Interior	Anabela Dinis
22	Viúva Monteiro & Irmão Lda. Transporte de Passageiros	Ana Luísa Monteiro

During the period of development of the application the TPT met 5 times between April 2015 and December 2015.

The STPF (Forum) in turn had a total of 4 public sessions between May 2015 and January 2016. As per the application report, the role of the STPF is to "build and validate the options for the territory presented at the different stages of drafting the Charter application and subsequently to track and monitor their implementation."

A total of 214 persons representing 133 different local/regional organizations attended the four Forum sessions. The table below is also copied from the application report and lists the typologies and numbers of organizations that attended STPF meetings

Tipe of organization	Nº of organizations present	Nº of participants
Tourism private stakeholders/businesses	39	46
Accommodation	14	15
Restaurants	4	4
Accomodation/restaurants	3	4
Traditional crafts and shops	10	14
Tourist and Cultural Animation	8	9
Travel Agents	0	0
Passenger transport companies	1	1
Business Associations	3	6
Local Community	27	27
Local Press	3	5
Public Organizations	32	86
NGOs	28	43
TOTAL	133	214

Beyond the more general meetings above, the process of developing the Charter strategy and application involved a further set of more focused meetings with specific members of the TPT, including:
- 6 municipal meetings, comprising only local stakeholders from each municipality;
- 11 institutional meetings with separate partners individually;
- 9 themed meetings, focused on specific thematic areas of the application, with the most relevant stakeholders concerned.

Overall, there were around 30 meetings with stakeholders during the development process of the strategy and Charter application. The Application documentation includes more detailed description of the key subjects/objectives of each meeting, and an extensive brief of annexes with scanned copies of signed attendance lists at each such meeting, as well as photographic evidence of participation, presentations and discussions.

Therefore, as a verifier, I am fully satisfied with the effort of collaborative consultation done and the extensive evidence provided of such. During the visit I also often had the opportunity to discuss and confirm that the process of consultation and collaboration provided in the documentation corresponded to the stakeholders' descriptions of the same.

Section 2.2 summarizes in more detail the timetable and process used by the two participatory structures and partners above for preparing the strategy presented.

1.2 Are local tourism enterprises involved?

3

Please answer yes or no and give a brief explanation.

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Yes, as seen by the two tables above, 39 local tourism enterprises participated in the open STPF, and a few TPT partner organizations have direct links to the local tourism sector and businesses. The latter are usually associative bodies with members from the tourism sector, and include:
- "Historical Villages of Portugal", a tourism development association;
- "Territórios do Côa", a regional development association;
- Three loca/regional business associations ("Business Association of Sabugal"; Business Association of the Region of Guarda", and "Business Association of Beira Baixa")

A local passenger transport business ("Viúva Monteiro & Irmão Lda."), is also a member of the TPT and responsible for leading two actions in the Action Plan.

1.3 Is the local community involved?

3

Please answer yes or no and give a brief explanation.

Yes, this happened in both more direct and indirect ways. The local community had the opportunity to be involved directly in the STPF, and the records show that around 30 individuals did so in personal terms. Indirectly, the communities were represented at the STPF meetings by representatives of the civil parishes, local associations/NGOs, and local press. Finally (but also indirectly), local communities are represented in the TPT by the local municipalities and other partners like the Schools' Group "Ribeiro Sanches".

The team has also created two online outlets to disseminate information on the Charter application to the local community, including a blog (where all documents drawn up within the application were made available for consideration, input and suggestions from all stakeholders) and a Facebook page, to allow "sharing of information, exchange of views and networking between public and private actors in the Charter territory."

1.4 Are local conservation interests involved?

3

Please answer yes or no and give a brief explanation.

Yes. Two conservation organizations are directly involved as partners in the TPT and leading actions in the Action Plan. These are:
IBERLINX Association - Association for the Conservation of the Iberian lynx and the development of their territories, which has been working with the Charter municipalities to promote the conditions necessary for the reintroduction of the Iberian Lynx in the area.
Transcudânia Association, which aims to promote sustainable development through the inventory, conservation and enhancement of Sabugal county's heritage.
A third organization – the Spanish Foundation "Naturaleza y Hombre" (Nature and Man) – is also a TPT partner and partner in several of the actions of the Action Plan.

1.5 Are the wider (regional) bodies responsible for tourism, conservation and regional development involved?

3

Please answer yes or no and give a brief explanation.

Yes. These are listed below. They are all are members of the TPT, and they are either leaders or partners in a range of actions of the Action Plan:
    Conservation bodies:

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- o ICNF-Centro (the Institute for Nature Conservation and Forests) that leads on this application and manages the Malcata Reserve, and is the Regional/National State conservation body in Portugal.
  - o "Geopark Naturtejo Meseta Meridional"
  - o "Forest Forum - Federal Structure of the Portuguese Forest".
- Tourism bodies:
  - o Turismo Centro de Portugal", the government's regional tourism agency with the remit for this region
- Regional development bodies:
  - o Regional Coordination and Development Commission of the Center Region, a goverment body with a remit for promotion of regional development, environment and spatial planning
- Farming:
  - o DRAP-C - Regional Directorate of Agriculture and Fisheries of the Center Region (government body)
- Wider associative bodies with regional development objectives and remit in the area:
  - o „Pro-Raia" - Integrated Development Association of Centre North Border
  - o "Raia Historica" – Development Association of Northeast Beira
  - o Territórios do Côa - Regional Development Association
  - o Historical Villages of Portugal - Tourism Development Association
  - o Association of Municipalities of Cova da Beira

1.6 Are other partners involved, such as volunteers?

x

Please answer yes or no and give a brief explanation.

No. The following was the explanation provided in the application report:

In addition to the partners identified in the preceding paragraphs, there has been no involvement of other entities. In the specific case of voluntary sector, there are no organized forms of it in the territory (only the scouts groups, who were invited but did not get to participate in any of the meetings).
(...) we believe that the obtained participation levels and the wide range of typologies of partners involved was very positive considering the size of the territory, levels of population density and times associated with travel within it, which somewhat limited a bigger participation in some plenary sessions of the STPF.

As a verifier, and looking at the range of partners involved and regional context, I agree that there was significant diversity of organizations involved to make this absence a minor issue.

Principle 2 – Sustainable tourism strategy and action plans

Preparation

2.1 Have a tourism strategy and action plan been prepared for the protected area?

Please answer yes or no and give a brief explanation.

Yes. These were presented as two separate documents, namely:
- Strategy and Objectives
- Action Plan 2016-2020.

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2.2 Briefly describe the process(es) and timetable(s) for preparing both the strategy and action plan.

The process was first initiated by the municipalities of Sabugal and Penamacor, the two administrative areas that shared the Malcata Nature Reserve. This was later extended to the municipality of Almeida to cover the full area of the Natura 2000 Malcata Site. A cooperation protocol between the three municipalities and ICNF was signed to agree that the latter would support and promote the process, but the required technical and other resources for the application would be provided by the municipalities. The municipality of Sabugal subsequently contracted the services of a consultancy company to lead the participatory process for the development of the strategy and action plan, and Charter application documentation.

As explained in point 1.1, the participatory process was structured around two typologies of inter-institutional platforms: a) a TPT comprised of technical staff from the partner organizations, ultimately responsible for the identification of relevant issues and proposal of actions; and b) an open consultative forum (STPF) for presentation and validation of the technical decisions produced by the former.

Around 30 formal meetings for the preparation of the strategy were had in the preceding year to submission, and the application report and dossier provides information on the meetings' objectives, attendance, etc. Rather than presenting it all here, the list below presents a summary of some of the key meetings and milestones of the process, and an indication of the timeframes involved (adapted from a table in the application report):

- 04-12-2014 - Collaboration protocol signed between ICNF and the Municipality of Sabugal and Penamacor for a joint Charter application concerning the whole administrative boundaries of the two municipalities as proposed Charter Area.
- 08-05-2015 - Signature of addendum to the protocol extending the Charter territory the entire Almeida municipality integrating in this way the full Natura 2000 Malcata Site.
- 1st Meeting of the STPF to present the Charter methodology and work schedule for the preparation of the application.
- June 2015 - Round of town hall meetings with members of the TPT and other bodies of the territory to collect information for preparation of a characterization and diagnostic report.
- 11-09-2015 - 2nd Meeting of the STPF to present, discuss and validate the characterization report and identify the positive and negative aspects of the Charter territory.
- Sep – Oct 2015 - 2nd round of town hall meetings with members of the STPF, and first round of institutional meetings with other public and private entities with specific expertise in the Charter territory. Purpose of these meetings was to prepare the "Strategy and Objectives" document, and identify lines of action to best respond to the positive and negative aspects identified in the 2nd forum meeting.
- 09-10-2015 - 3rd Meeting of the STPF to present, discuss and prioritize the Lines of Action identified in the previous meetings.
- 14-16 Oct 2015 - Study visit to the Luberon Regional Nature Park (France), by a team of the three Municipalities in order to know the process of elaboration and implementation of Charter in other territory, and the development and structuring of the bike tourism offer in that park.
- 20-23 Oct 2015 - Round of themed meetings with members of the STPF for the preparation of the "Action Plan 2016-2020" document, based on the priority lines of action identified in the 3rd Forum meeting.
- 27-01-2016 - 4th Meeting of the STPF to present the Action Plan and other documents constituting the application dossier. Signing of the Charter principles by all promoters of action in the Action Plan and other members of Forum.

The following is copied from the application report and explains the process that generated the diagnostic of the area and definition of objectives and actions of the overall strategy and action plan:

"The Sustainable Tourism Development Strategy and the Plan of Action 2016-2020 were developed around the principles of the Charter, in the following manner:
   a) Seven analysis parameters of analysis were defined reflecting the ongoing concerns of the 12 principles of the European Charter for Sustainable Tourism"; (Note: these included issues like accessibility, heritage, tourism services, infrastructure, organization, training, networking, etc).
   b) "A Characterization and Diagnosis of the Charter territory "Gata-Malcata / Land of the Lynx" was prepared, through a SWOT analysis structured around the seven previously defined

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parameters. Members of the STPF (2nd meeting) were asked to identify positive and negative factors of the Charter territory for each of the parameters" (Note: these were effectively seven different SWOTS and the results are presented in the Diagnostic document).

c) "In the 2nd round of municipal meetings with members of the STPF, a series of lines of action were identified that could enhance the positive factors and eliminate or diminish the negative factors identified in the 2nd meeting of the STPF;"

d) "Agreement and prioritization of the lines of action defined above was done in the 3rd meeting of the STPF, according to their level of importance and perceived feasibility" (Note: more detailed information on this prioritization process was presented on the Strategy document. This included the creation of two working groups (public and private bodies) and a scoring by those of the full range of proposed types of action. The full listing of actions, from higher to lower scores, was presented in the document in a very transparent way).

e) "In the following round of thematic meetings by members of the STPF the lines of action prioritized above were translated into concrete action proposals, which were presented and discussed at the 4th meeting of the TPT;

f) The promoters of the selected actions above subsequently elaborated the respective 'action files' presented in the Action Plan 2016-2020."

2.3 How does the tourism strategy relate to the protected-area management plan?

In terms of the Malcata Nature Reserve, its management plan does not mention the Charter Strategy. However, several of its articles define and regulate the organization and management of tourism and recreation activities in the Reserve. These include:

- Article 30. Recreation Activities - this article defines where these can occur, pre-conditions for such, and the responsibilities of the Area management in terms of provision of infrastructure support.
- Article 31. Interpretation Routes - defines responsibilities and conditions for the setting of small and large routes for hiking, equestrian or bicycle alternatives. It considers that Directorate of the Reserve can "support the development, dissemination, signaling and management of established routes, using the support of the entities it deems appropriate or that find most suitable for the purpose."
- Article 32. Nature Tourism – refers to the National Programme of Nature Tourism (also managed by ICNF) and sets the regulations for the licensing of activities, use or adaptation of built infrastructure within the reserve for tourism purposes, etc.

"In addition to what is established in area management plan regarding the regulation of tourist activity, ICNF also has other relevant legal instruments: i) recognition and licensing of tourist animation companies operating within the Reserve as nature tourism operators; ii) recognition and licensing of other accommodation activities, catering etc. while nature tourism activities; iii) creation of a natural.pt brand that recognizes the effort of tourism entrepreneurs who engage in practices of sustainable tourism."

(...) "With regard to RN2000, and more specifically to Charter area outside the limits of the Reserve, its Sectoral Plan usually takes tourism as a risk, establishing at most activities to avoid, not taking therefore an approach focused on opportunities, but rather on threats".

The Geopark in turn has its own strategic plan and action plan that include Geotourism as one of its main priorities.

2.4 Are there any apparent contradictions between tourism and protected-area management objectives and actions?

Please answer yes or no and give a brief explanation.

No. The Nature Reserve is the area with the most stringent conservation status of all the classified sites in the Charter territory, but as explained above, tourism and recreation activities within it are highly regulated. The wider N2000 site has no traditional management plan (nor management body, objectives, actions, etc), but instead a Sectoral Plan providing guidelines for aspects like land use, farming and forestry practices, infrastructure improvements, etc, that promote and preserve its mosaic landscape and biodiversity. These guidelines are subsequently transposed and integrated into the

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municipalities' own Director Plans who then take them into consideration in the regulation of activities in the territory. The application dossier included a copy of the Sectoral Plan, and after analysis the information presented should not present any apparent contradictions with what is being proposed in the strategy and action plan.

Consultation process

2.5 **Comment on the involvement of local stakeholders in drawing up the strategy and action plan, making reference to the forum/partnership structures described under Question 1.1 as appropriate.**

Sections 1.1 to 1.6, and in particular section 2.2., provided detailed information on how stakeholders were involved the consultation process for the definition of the strategy and action plan. As explained, the process was coordinated by a third party consultancy company that led a wide consultation exercise with an equally wide range of local and regional stakeholders. I was particularly impressed with how the stakeholders were involved through the STPF (fora) in aspects like the diagnostic of the area (the seven SWOTS mentioned in 2.2), the process of prioritization of lines of action to pursue in the strategy, and the transparency of the whole process (including inclusion of all outputs from all stages in the application dossier).
As explained in point 2.2., the process had a strong bottom-up emphasis, and the 3rd meeting of the STPF had two working groups (public and private sectors) scoring the proposed lines of action according to two criteria: 1) importance for the organizations in that group; and 2) feasibility (physical and financial) over 5 years.
Through the TPT, the technical staff of the partner organizations had then also a strong input to the production of the 51 detailed 'action sheets' presented in the Action Plan, which include information on very detailed aspects like follow-up indicators, annual budgets, etc.
I had several opportunities during the verification visit to talk with local stakeholders about the consultation process. From it I got the distinct perception that the discussions around the focus of the strategy, lines of action, etc. were highly participated and debated, with the stakeholders providing a clear input and steer to the final strategy produced. It was clear that what was presented in the application was what the stakeholders themselves identified as areas they wanted to pursue.

2.6 **Was there consultation with local tourism enterprises in preparing the strategy?**

Please answer yes or no and give a brief explanation.

Yes, 39 enterprises participated in the STPFs and the sector is also represented in the TPT. See more information on points 1.1 and 1. 2.

2.7 **Was there consultation with the local community and other interests/ stakeholders in preparing the strategy?**
3

Please answer yes or no and give a brief explanation.

Yes, see more detailed information on points 1.3 to 1.5. I was particularly impressed with the efforts done to include the wider regional government bodies responsible for tourism, regional development, farming, education, etc, and had the opportunity to meet some of its representatives during the visit. Many of these lead actions in the action plan and are members of the TPT responsible to drive the strategy forward.

Assessment of resource needs, constraints and opportunities

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2.8   Was there an assessment of the natural and cultural resources, their sensitivities (capacity) and opportunities for tourism? 2

> Please answer yes or no and give a brief explanation.

Yes, but as stated in the report:

> "Yes, but not specifically in connection with the preparation of the Charter process.
> In terms of the evaluation of natural resources, the protected and classified areas of the Charter area have had several sectoral and special plans that included characterizations of their natural resources and environmental values , sensitivities and threats, regulating its use, including tourism."

The report goes on to list a number of plans and documents where such assessment was made, including the management plan of the Nature Reserve and other related publications and technical reports of ICNF, RN2000 evaluation reports, geological heritage evaluation of Penamacor municipality and its potential for tourism (done when joining the Geopark), etc.

> "As regards to the assessment of the cultural resources of the territory and its tourist potential, this has also been done in the framework of different activities, including:
> • Application of Capeia Arraiana the Cultural Immaterial Heritage, for which it was necessary to develop a comprehensive study of this unique tradition;
> • Preparation of characterization sheets of built heritage by each of the municipalities within their Director Municipal Plans;
> • Archaeological Charters of each of the municipalities;
> • Several studies conducted on the cultural and historical aspects (ethnographic, archaeological, rural, etc.). "

Several of the reports above were included as Annexes in the application dossier.

2.9   Was there an assessment of needs of the local community and economy? 2

> Please answer yes or no and give a brief explanation.

Yes, both more directly through the participatory process listed above (e.g. the SWOT analysis done with the local stakeholders), as well as indirectly through existing documentation. The report lists some of this, including the management plan of the Nature Reserve, which includes a set of socio-economic analysis of the Reserve and its area of influence; or the Municipal Strategic Plans for 2015-2025, being drafted at the time of application, which included a strategic development vision for each county and detailed analysis of their economic and social contexts.

2.10   Was there an assessment of strengths/weaknesses of tourism infrastructure/ services? 3

> Please answer yes or no and give a brief explanation.

Yes. The Diagnostic report presented with the application presents quite an extensive assessment of this aspect for the full Charter area (i.e. the three municipalities).

Assessment of existing visitors and their needs (B6)

2.11   Was there an assessment of existing visitor patterns and needs? 2

> Please answer yes or no and give a brief explanation.

Yes, but only partially and in a very "patchy" way. For instance, quantification of overnight stays is very inconsistent, with official statistics only available for one of the three municipalities. The Diagnostic report tries to provide proxy measures with data on visitation numbers to existing tourism offices, ICNF interpretation centres, main museums and cultural events, etc. These are necessarily incomplete and don't usually allow a distinction between tourists and excursionists, places of origin,

etc, but provide at least a perception of key trends over the years and throughout the year. The conclusion of the report is that visitation will likely be around 250,000 people a year, though the vast majority would be day visits for the many events and fairs in the region, and many likely from the yearly returning diaspora.

However, most of the information provided is quantitative only, with little or none qualitative information presented, and particularly on visitor needs.

The report acknowledges this weakness and refers to a planned action in the Action Plan to address it (though the focus here also seems to be on quantitative data).

Identification of future visitor markets

2.12   Was there an assessment to identify future visitor markets offering potential?
2

Please answer yes or no and give a brief explanation.

Yes. Again, the Diagnostic report includes a section on "Potential Markets" identifying some priority markets in the Nature Tourism categories, potential motivations, visitor typologies, niches, origin, season and stay. However, this was done in a fairly generic/simplistic way, and is again another area that the report refers to a future action in its Action Plan.

Implementation

2.13   Does the action plan include an indication of phasing/staging of action over time?
3

Please answer yes or no and give a brief explanation.

Yes. Every action in the action plan presents its level of priority, planned year(s) of execution and expected annual cost/budget.

2.14   Does the action plan indicate which stakeholders or partners are responsible for the delivery of each action?
3

Please answer yes or no and give a brief explanation.

Yes. Every "action file" details its key promoter and partners for delivery.

2.15   What is the size of the budget that the protected-area authority is devoting to the implementation of the action plan per year, <u>excluding</u> staffing costs?

From the report:
> "If we exclude the costs of human resources, the estimated total investment over the next five years allocated to the Charter territory for which ICNF is responsible will be of about € 388,000 with an average annual investment of 77,600 €."

What is this as a percentage of its total budget?

The figure presented above is an estimation based on the actions where ICNF appears as a lead promoter. However, calculating its relative proportion in relation to ICNF's budget for the area is not really possible for the following reasons:

"The Malcata Nature Reserve does not have any legal identity nor financial or administrative autonomy, being integrated in the Department of Nature Conservation and the Forests of the Centre (DCNF-Centro), also with no budget allocated or autonomy, which in turn is part of the Institute of Nature Conservation and Forestry (ICNF), the candidate entity to the Charter".

In other words, after several changes in recent years over Portuguese public administration of protected areas, budgets are now managed centrally by the national ICNF body and regionally by its regional branch (DCNF-Centro), that has overall responsibility by all the ICNF protected areas of the Centre Region of Portugal. Therefore, no dedicated budget exists exclusively for this area, but this is shared (as is its staff) with other protected areas in the region on a needs-basis.

2.16   Have funds been provided (or are they being sought) from other sources?

Yes. The application report and action plan provide a detailed breakdown of the levels of funding expected from each partner. The table below shows a summary of it by main partner categories, showing that ICNF's contribution is expected to be just under 5% of the overall funding for all actions in the Action Plan.   The Action Plan contains a mix of actions that have already secured funding (through projects already approved) and actions with no guaranteed funding yet, but with an identification of the funding sources the partners plan to apply (mostly European funding under the Strategic Framework 2014-2020).

PROMOTER	Total investment	%
ICNF (Instituto de Conservação da Natureza e das Florestas/ Malcata Nature Reserve)	431.500 €	4,9%
Municipalities	2.796.500 €	32,1%
Territórios do Côa – Regional Development Association	1.281.000 €	14,7%
Other public partners	570.000 €	6,5%
Private partners/enterprises	1.054.000 €	12,1%
NGOs	2.589.212 €	29,7%
TOTAL	8.722.212 €	100%

2.17   Does the level of funding seem reasonable to deliver the proposed action plan? 3

Please answer yes or no and give a brief explanation.

Yes. Every "action file" in the action plan shows a detailed breakdown of the expected cost/funding of each action per year, with a separation of the staffing costs per year too. This shows that each partner that is an action promoter has given consideration on the full cost estimate of every action.

2.18   Describe the staffing that the protected-area authority is devoting to the implementation of the action plan?

Please answer yes or no and give a brief explanation.

ICNF appointed one member of its technical staff as liaison member to the Charter strategy and action plan. Other officers, rangers and employees will also work on specific action.
However, none of these ICNF staff will be devoted full time to the implementation and monitoring of CETS. Instead, a protocol was signed between ICNF, the three municipalities, and Territórios do Côa (Regional Development Agency) to have the latter assuming the role of technical secretariat of the

partnership and lead on the central coordination and monitoring of the action plan, managing the forum and partners' networking, etc.

2.19 Is staffing being provided from other sources?

Please answer yes or no and give a brief explanation.

Yes. As mentioned above every action file in the action plan includes the expected staffing costs from the contributing partners.

2.20 Do you believe the action proposed can be implemented with this level of staffing?
3

Please answer yes or no and give a brief explanation.

Yes. See previous answer. Also, all key partners are contributing with technical staff to the TPT, which is planned to continue to meet periodically for the implementation and monitoring of the action plan.

Commitment of partners

2.21 Have any formal arrangements been made with partners (such as a legal agreement, a memorandum of understanding or a letter of commitment) for implementation of the strategy and action plan? 3

Please answer yes or no and give a brief explanation.

Yes. All partners that are direct promoters of actions in the action plan (a total of 18 organizations) have signed the Charter principles in a public ceremony under the 4th Forum meeting.
Several other formal memoranda of understanding/collaboration protocols were signed during the application process, including:
- A collaboration protocol between ICNF and the three Municipalities for the joint development of the application, with the support of ICNF but technical execution by the Municipalities
- A supporting letter of the government's regional tourism agency (Turismo Centro de Portugal), declaring availability to support the project.
- Commitment letters from the Spanish "Mancomunidades" of Sierra de Gata and Alto Agueda, authorizing the use of the name "Gata-Malcata", confirming the will to submit a joint Charter application with the current partners in 2020, and supporting the actions of the current Action Plan related to their preparation for such.

2.22 Does the protected area have any other formal arrangements with partners for implementation of the strategy and action plan or other methods for ensuring their commitment? 2

Please answer yes or no and give a brief explanation.

Beyond the public commitment mentioned in point 2.21, there is also the agreement between partners to have the Association Territórios do Côa providing the technical secretariat for the monitoring and support to promoters regarding the implementation of the action plan (see 2.18).

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2.23 **Have sufficient indicators been identified for the monitoring of the success of the strategy/action plan and can these be practically measured?** 3

Please answer yes or no and give a brief description/explanation how they will be measured.

Yes. Each of the 51 'action files' included a dedicated section listing the respective follow-up indicators, where would these be evidenced (e.g. in which report would these appear), and periodicity of monitoring, as well as separate sections listing output indicators for each action. A total of over 180 follow-up indicators and over 120 output indicators were listed, and these are also summarized in separate tables at the end of the Action Plan.

Addressing key issues

Specific action that the Charter looks for in the action plan, Principles 3 to 10
Indicate below the level of current activity (A) and planned activity (B).

Principle 3 – Protecting natural and cultural heritage

3.1 **Monitoring impact on flora and fauna and controlling tourism in sensitive locations** A 2 B 2

The most sensitive natural area in the region is the Malcata Nature Reserve and this has a high level of protection and monitoring ensured by its management plan and ICNF's staff, rangers, etc. Tourism activities within it are also strictly regulated and controlled. The wider N2000 site (crossing the three municipalities and managed by these) does not enjoy the same conservation status and level of monitoring and control as the Nature Reserve, although its Sectoral Plan is fairly restrictive on the guidelines for allowed land use and interventions.
In terms of activities already undertaken, the application report lists here the range of planning, management and development plans in the region regulating protection of natural resources (including also management plans for the key reservoirs as sensitive areas and Geopark plan).
In terms of new planned activities in this area, and although the application report lists several actions with a more indirect effect on such aspects, perhaps the one with a stronger potential positively contribution to improve controlling of tourism in sensitive locations, is the following:
-    "Action III.34. Charter of Nature Tourism Activities in the Gata-Malcata area
     o   Aims to regulate nature tourism activities in the Charter territory, and indicate for each activity and natural setting the locations and appropriate times of the year when these can be performed, as well as respective carrying capacities."

3.2 **Encouraging activities, including tourism uses, which support the maintenance of historic heritage, culture and traditions** A 3 B 3

This is an already existing area of strength of the region. As a markedly rural territory the three municipalities have preserved a range of traditions, cultural and historical heritage, and proudly promote these through a range of events, festivals, fairs, etc. Some of these emphasise immaterial cultural heritage and traditions very popular with the locals and with its vast diaspora on its annual summer return (like its own variation of traditional bull runs), others emphasize local produce, traditional gastronomy, arts and crafts; whilst others emphasize the historical military past of the region (given the border with Spain), preservation of traditional built heritage, etc.

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In terms of planned activities, the suggested actions aim mostly to build on the existing strengths and better coordinate and promote the vast range of activities already happening (that until now have been organized/promoted separately), promote a better liaison and networking between existing museums and interpretation centres, etc. Some specific new actions aiming at creating new resources are also planned, like the creation of a new "Etnocentro" (cultural and ethnographic interpretation centre).

3.3 Action to control development (including tourism) which would adversely affect the quality of landscapes, air and water; use non-renewable energy; and create unnecessary waste and noise   A 2   B 2

This is not an aspect of serious concern for this territory, which has extremely low population densities, and a rapidly reducing and ageing population. If anything, it could almost be said that the municipalities would welcome more development, as over the past years this has mostly dwindled in the territory rather than grow. Nonetheless, development control in the territory is well regulated through, for instance:
- "The Master Plan of each of the municipalities, which defines the planning and management of the territory, the regulation of uses and building for each defined space categories;
- The spaces of the Natura 2000 network within the territory are regulated by a Sectoral Plan that subject any urban operation in these to the approval of ICNF.
- The reservoirs of Sabugal and Meimoa and their margins are regulated by management plans detailing the permitted uses and building loads on those, and allowed location of any tourist facilities to be implemented. "

Furthermore, development within the Nature Reserve is of course strictly controlled. In terms of non-renewable energy, the region is actually well served by several wind farms and I have learned from the mayors that these constitute important funding income streams for the municipalities.

3.4 Action to reduce tourism activities which adversely affect the quality of landscapes, air and water; use non-renewable energy; and create unnecessary waste and noise   A 2   B 2

Tourism activity and visitor pressure in the territory is generally low, apart from peak events highly limited in terms of location and time (in connection with specific festivities, events, etc). Any organized tourism activities within the area of the Nature Reserve require formal licensing, and ICNF has also produced a code of conduct for visitors. Several environmental education activities, walking tours, guided visits, etc, already happen in the territory promoted by the partners in the project.
New actions suggested aim mostly to strengthen the Environmental Education offer and activities for visitors and local population. The implementation of the Charter of Nature Tourism Activities (mentioned above) is also indicated as an action that would help address this aspect.

3.5 Encouraging visitors and the tourism industry to contribute to conservation (e.g. "visitor payback" schemes)   A 1   B 1

This continues to be an area of little tradition and take-up in the Portuguese context, in particular the set up of "visitor payback" schemes or any forms of more direct financial contribution to conservation by visitors or the tourism industry. The report refers instead to a growth of interest in volunteering, with some activities already happening in the area. An action is proposed to build on this and organize two annual volunteering camps (one national and one international) that would be focused on conservation and landscape quality improvement interventions.

Principle 4 – Meeting visitor needs/quality of experience

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4.1   Surveys to measure visitor satisfaction   A 1   B 2

Currently, as the report itself states:

> "This is one of the area of greater weakness in that no systematic collection of information exists in the Charter territory as a whole, and the collection that is made does not following a common methodology/pattern, nor is its further processing coordinated or disclosed to the sector's economic agents and the general public."

Collection of visitor data at the moment is restricted mostly to counting visitors at the Malcata Reserve Interpretation Centre and Tourism Offices from the municipalities, with some data collected on visitors' characteristics. The report refers also to some satisfaction surveys being done in some events, but these are sparse and isolated.

In terms of planned activities, two actions are suggested to address this type of issues, namely:

- "Tourism Barometer of Gata-Malcata / Land of the Lynx
  • Creation of an integrated system of collection, processing and analysis of data on tourism demand for monitoring and decision-making support.
- Phase II of the Charter - Tourist Businesses
  • To promote adherence of entrepreneurs in the tourism sector (accommodation, catering, activities and points of sale) from the territory so they can be recognized as Charter Partners."

The former action is led by ADSI (Agency for the Development of the Information and Knowledge Society), a partner in the project in collaboration with others. ADSI is a non-profit association that brings together other local stakeholders, and they are equally the promoters of the regional news portal. I had the opportunity to meet the representative of the organization and hear more about the plans for the implementation of this action, which will consist of a digital platform to be used by other partners in tourism offices, accommodation providers, museums, etc.

The second action is more aimed at securing a group of tourism businesses as Charter Partners that could be more actively committed to support the collection of information from their guests.

4.2   Identification of future visitor markets and their needs   A 1   B 2

The Diagnostic report included in the application included a "brief and generalist analysis of potential markets", and the documentation also refers to previous demand studies by the national Tourism Agency on nature tourism, as a strategic product for the wider region (not just the Charter area, but a much wider central interior region of Portugal).

In terms of planned actions, the Barometer discussed above was presented as a tool to help develop this aspect further, together with a separate action aiming at developing a joint image and communication strategy of the Charter area, to increase its profile in national and international markets.

4.3   Specific provision of facilities and information for disabled people
A 1   B 2

Currently the provision of adapted facilities is limited to the minimum legal requirements, which normally adaptation of public buildings and services but not necessarily all private businesses. The action plan presents two actions aimed at improving this aspect, summarized below. Not surprisingly, these have a strong focus on the senior population, as the region has one of the highest ageing rates in the country.

- Inclusive Tourism By VMI
  o "To develop specific tourism offers aimed at senior citizens and people with disabilities, supported with adequate transportation, as well as with the accompaniment of a local guide and a health worker." (Note: VMI is a local bus/coach company, partner in the project, which owns an adapted bus that can take to a

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maximum of twelve wheel chairs. The programs proposed are mostly of one day aimed at local population with mobility issues).
- Senior Tourism in Gata-Malcata / Land of the Lynx
  o A training and awareness programme for local businesses focused on the needs and opportunities of senior tourism, supporting access to funding for adaptation intervention, technical support on adaptation requirements.

4.4 Provision of facilities for economically disadvantaged people A 2 B 2

From the report:
"Access to most cultural venues (eg museums) and heritage (eg castles) is free throughout the year and / or on specific days. When access is paid, prices are quite affordable, and managing bodies apply differentiated policies allowing free access to schools and other local institutions such as nursing homes and day centers;
Visit to the Interpretation Centre of the Malcata reserve is also free, as is access to most public use equipment existing in the territory (viewpoints, lunch parks, recreational areas, paths, etc.). "
The actions discussed in the point above aimed at senior tourism are also presented here as objectives that address this point.

4.5 Action to monitor the quality of facilities and services   A 2   B 2

Quality monitoring of tourism facilities and services is normally done by government/regulatory bodies.
In the case of the Malcata Reserve: "tourism and environmental animation companies wishing to develop their activity within the Reserve, must first be recognized as Nature Tourism agents, a "seal" of good environmental practices and code of conduct to which these entities commit to adhere".

Planned actions aimed to contribute further to this include the implementation of phases II and III of the Charter, and the promotion of "natural.pt" to local businesses, a national brand/accreditation system developed by ICNF and that includes also accreditation of accommodation and recreation businesses in/around protected areas that follow pre-defined criteria.

4.6 Action to improve the quality of facilities and services   A 3   B 3

This is a strength of the region, partly a consequence of its disadvantaged socio-economic status that make it a beneficiary of several funding support mechanisms from national and European sources to improve the quality of economic activities in the region. The three existing Local Development Associations (all partners in the project) and other project partners (like business associations, etc) have a good history and experience of supporting quality improvement and setting up of local business through access to funding, capacity building, etc.
Planned actions continue to reinforce this aspect, however now with a stronger focus on aspects like capacity building, managerial support, knowledge and interpretation, , etc, as the funding priorities have changed to mostly non-infrastructure support. Nevertheless, some interesting infrastructure actions are also proposed, like the creation of a network of parking and service stations in the territory to support caravan tourism, a growing activity in the region.

Principle 5 – Communication about the area

5.1 Sensitive promotion of the protected area as a destination using authentic images and reflecting capacity/needs of the area, including times and locations A 2 B 3

Currently the situation is somewhat mixed. Several of the key resources in the area are reasonably well served in terms of promotional information (e.g. the Nature Reserve, Geopark, Historical Villages and some of the municipalities and/or its heritage resources), but all of this happens in isolation as separate strategies or products, normally with only a partial reach of the currently proposed Charter area.
Therefore, the new actions proposed here aim mostly to consolidate the creation of this new "Land of the Lynx" identity built around the three municipalities working together as a single destination. A wide range of initiatives is proposed in terms of developing a coherent promotional and communication strategy, specialist marketing products and materials around nature tourism opportunities in the region, etc. Encouragingly, the lead partner for these actions is "Turismo Centro the Portugal", the regional branch of the national tourism agency, in collaboration with the local partners. I had the opportunity to meet a representative from the organization, who confirmed the willingness of the agency to support this new destination approach for the territory.

5.2 Influence on the promotional activities of others (region, enterprises, etc.) A 1 B 3

As explained above, partners have so far worked mostly separately rather in collaboration, with the exception of specific initiatives that cross different administrative regions (like the Historical Villages programme). The need for joint collaborative and mutual promotion work by all partners is well identified and addressed through a wide range of complementary actions in the action plan (many referred already in previous points).

5.3 Provision of clear information material on where to go and what to do when in the area (guides, maps, websites – relevant languages)   A 2 B 3

Same comments as above. What exists is not bad (and some of it is very good), but is uncoordinated as this territory was effectively never thought of as one joint destination. The range of actions proposed should address this well. Some not mentioned yet include a "Naturguide" mobile app for the Charter area, led by one of the local accommodation businesses, and a central reservation and booking system for the offers in the region, an action led also by one of the private sector partners in the project.

5.4 Provision of accessible information centres/points for visitors and local people A 2 B 3

There is a network of existing institutional information and interpretation centres in the region, some ran by the municipalities, some by ICNF, as well as information panels in key areas, etc. What is proposed builds on this and other tried and tested formats in other Charter Parks, like the partnering with networks of local businesses to become "information points" for the Charter area.

5.5 Process for ensuring that others (especially tourism enterprises) provide good information   A 2 B 3

The range of initiatives explained in the previous points should also address this well.

5.6 Provision of guiding services and an events programme for visitors and local people, including groups and schools   A 2   B 3

Several of the partners in the project already provide guiding services, like the ICNF does for schools and groups in the Nature Reserve, guiding services provided by the Geopark, some of the local museums, organized visits to key monuments (like the Almeida fortress, etc). Likewise, there are several programmes of events (mostly cultural) led by several partners in the project with a strong take up by the local population as well as visitors. Like the examples above, one of the key aims of the strategy is to increase coordination and collaboration between existing offer and enlarge it to the full Charter territory, but also complement this with new offer and services, like a proposed new "guides' bank" and booking system for visitors and local businesses.

Principle 6 – Tourism products relating to the protected area

6.1 Provision/development of tourism offers (special events, holiday programmes, etc.) involving the discovery and interpretation of natural and cultural heritage   A 2   B 3

As mentioned, there is no lack of tourism offer and events in the region, promoted by both public and private organizations, many of these partners in the project. There tends to be a strong emphasis on the cultural and historical heritage of the region, with annual events like the Commemorations of Almeida's Siege, Medieval Fairs, gastronomic itineraries, festivals, etc). In terms of natural heritage, both the Geopark and ICNF provide environmental interpretation activities, and both public and private organizations have also started to promote nature-based activities like hiking, biking, birdwatching, etc). There is also a growing offer of thermal Spas and medicinal waters (each municipality as its own thermal spa).
Planned activities aimed to reinforce this offer around selected themes, including actions on:
- Discovering the Border - a programme of cultural events and spaces exploring aspects related with the transnational border nature of the territory, its history, smuggling heritage, emigration, peninsular wars, etc.
- Traditional cheese-making – supporting a local goat cheese shepherd and producer to adapt its farm for visitation and dissemination of local produce
- Land of the Lynx by Bike – development of organized offer for biking tourism, with development of routes, information and interpretation materials, guides, acquisition of bikes for renting, training for local businesses, etc
- Natural Offer in the Land of the Lynx – an action bringing together the local nature/ecotourism providers for the development of coordinated offer around the region's natural heritage
- Equestrian Tourism – to develop organized offer around this theme, taking advantage of the horse-riding tradition in the region
- Network of walking routes in Penamacor – an action promoted by the Geopark, developing a series of routes designed around the most relevant geological sites of the area
- Xacobeo 2021 – recovery of an old roman pilgrimage route to Santiago that used to cross the territory (Via Dalmatia)
- And a range of other more localized actions promoted by different partners in the project.

6.2 Effective promotion of these offers   A 2   B 3

The 'action files' of all actions centred on offer development include a short description of their promotion plans, and the action plan includes also separate actions exclusively dedicated to common organization of promotion.

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Principle 7 – Training

7.1 Providing or supporting training programmes for staff of the protected area, in sustainable tourism   A 1   B 2

The number of ICNF staff directly allocated to the Malcata Nature Reserve is extremely reduced, with only four technical staff and five nature rangers. However, one of such staff as direct responsibility for tourism. Technical staff from the three municipalities and the Association 'Territorios do Coa' are likely to have a stronger role in the implementation of the wider strategy built around the wider N2000 territory. The report emphasizes more the participation of partners in past collaborative projects, congresses, and exchanges of experiences in sustainable tourism (including with the Spanish side and study visits to other Charter Areas), rather than attendance at specific training programmes. Likewise, in terms of planned activities, we are informed that "the staff from ICNF, Municipal Councils and 'Territorios do Coa' involved in the implementation of the Charter will not be subject to specific training, but will benefit from part of the training that will be promoted by other entities in the Charter partnership".
This other training activities and partners are discussed further below.

7.2 Providing or supporting training of other organisations and tourism enterprises in sustainable tourism   A 2   B 3

Several of the partners develop and deliver training and capacity building activities in different aspects of sustainable tourism for a range of audiences, from the partner universities, local colleges, business associations, etc., though again, not usually in a joint or coordinated way.
In terms of planned actions, the partners in the project with a direct remit of training/education (i.e. Polytechnic Institutes of Guarda and Castelo Branco, University of Beira Interior, Business Associations and others) have jointly proposed a range of programmes aimed at different levels of expertise and accreditation, from upskilling certified modular training on tourism and hospitality for local SMEs to needs assessment and CPD offers to local stakeholders.
Other actions referred here that would contribute to this aspect include the implementation of phase II of the Charter supported by training for partner enterprises, and attendance by the partners at the biennial Charter meetings of the European network and Portuguese/Spanish networks, as well as a proposal to organize the 2020 edition of the latter.

Principle 8 – Community involvement and maintaining local quality of life

8.1 Involving local communities in the planning of tourism in the area A 2   B 2

This has traditionally happened through the institutional and planning mechanisms and platforms, that usually require consultation with local communities or their representatives, like the management plans for the municipalities or others. Several of the partners in the project developing a range of tourism related activities and events are Local Development Associations or associative bodies, that traditionally also include representatives from local communities. Finally, the extended consultation process carried for the development of the strategy and action plan presented was also signalled as an example of how local communities, businesses, etc were given a range of opportunities to help define the strategy presented. The continued activity of the Forum is presented as the main format to continue to guarantee community involvement throughout the implementation process.

8.2 Communication between the protected area, local people and visitors

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A 2 **B** 2

In terms of the Malcata Nature Reserve, the ICNF staff regularly provides information and technical support to local population in its central office as needed and maintains a webpage with relevant information for local and visitors. On the wider territory, all municipalities also have their regular open service and consultations to the general public, provision of technical support, etc. Likewise, the Local Development Associations provide regular technical and information service to local public on existing funding opportunities. Communication with visitors is mostly unidirectional, through information and promotional materials (in point 4 it was explained how no real consultation exists at the moment on visitor satisfaction).
Like above, the continuation of the Forum is signalled as an important action to allow dialogue to continue. An action is also proposed to promote a partnership between the local media (local tv, radio, press) to contribute to a news portal of Land of the Lynx.

8.3 Mechanisms for identifying and seeking to reduce any conflicts that may arise **A** 2 **B** 2

Again, the regular activity of the Forum is signalled as a mechanism to allow for continued dialogue and resolution of conflicts, as well as the continued partnership work between all partners in the project, their existing dialogue platforms with the public, etc. The previously referred Charter of Nature Tourism Activities is also appointed as a tool to regulate tourism activities in the territory and help avoid potential conflicts.

Principle 9 – Benefits to the local economy and local community

9.1 Promoting the purchase of local products (food, crafts, local services) by visitors and local tourism businesses **A** 2 **B** 3

This is traditionally a strong area in inland rural regions of Portugal, and this area is no exception, with strong traditions of local food, produce, crafts, etc, supported by several annual events, fairs, festivals, etc, to promote and sell such products.
The proposed actions build on such strengths, to provide additional levels of support to local producers. Examples include, amongst others:
- Technical support to small local farmers and producers with issues of legal licensing and labelling, to support placement of their products in the market
- A new annual fair centred on the traditional activities and produce of the three municipalities of the 'Land of the Lynx' as one unit;
- Creation of a new Centre for Arts & Crafts to support local microenterprises' trade and sales
- Setting of a network of "points of sale" of local products (e.g. jams, cheese, wine, olive oil, liquors, etc) across tourism businesses in the region, as well as museums, tourism offices, etc.
- Setting of a "Menu Raiano" (Border Menu), developed in collaboration with regional gastronomic societies, local restaurants, hospitality schools, local cooperatives and others, that would be based on local produce and traditions and offered at local restaurants;

Not necessarily focused on local tourism businesses, but worth mentioning, is an action entitled "Solidary Economy" planned by the "University of Beira Interior" (a project partner). This aims to create local short supply chain networks between local farmers and local schools, charities, care homes, etc, with the mutual aims of supporting consumption of local produce and strengthening the ties between local buying institutions and local farmers.

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9.2   Encouraging the employment of local people in tourism   A 1   B 2

Local employment (or the lack of it) is a problem in the region, which is also behind the strong depopulation and emigration trends, which subsequently reinforce the problem more. The regular actions of Local Development Associations, Business Associations and other partners on support to entrepreneurship, access to funding, training, organization of fairs, etc, are some of the ways local partners try to address this. Several of the actions and new planned products mentioned in point 6 equally aim to encourage more local employment in tourism. In the case of ICNF, there is a planned action to recover disused 'forest guard' houses as accommodation offer in the interior of the Nature Reserve and grant their commercial concession for local providers.

9.3   Development of tourism in association with traditional economic activity (e.g. agriculture)   A 2   B 3

The development of tourism offer in the region is tied very closely to its traditional economic activities as its differentiating factor - see point 9.1.

Principle 10 – Managing visitor flows

10.1   Keeping a record of visitor numbers over time and space, including feedback from local tourism enterprises   A 2   B 2

Records are currently kept of visitor numbers in the local tourism offices, ICNF interpretation centre, local museums and some of the main events in the region, but not of night stays in the full territory, nor feedback from local tourism businesses.
See point 4.1 for planned actions.

10.2   Creating and implementing a visitor management plan   A 2   B 2

Within the Malcata Nature Reserve (the area in the region with the highest protection status) visitation is fairly well regulated and numbers are low. Its zoning identify zones of total, partial and complementary protection, and tourism and recreation activities are only allowed in the complementary areas. Routes and paths for hiking, biking, etc are defined by ICNF's management, taking into consideration the area's management plan.
In the wider Charter territory, including the RN2000 site, no central visitor management plan exists, but visitation is instead managed through passive ways to influence visitors' movements, like signposting of pre-selected routes or setting of public use spaces and equipments (e.g. picnic areas, information areas, etc).
Going forward, the definition of the "Charter of Nature Tourism Activities" (see 3.1) and Naturguide mobile app (see 5.3) are two planned actions that can support visitor management in the full Charter territory, as well as the new planned routes for biking, mountain biking and hiking.

10.3   Promoting use of public transport, cycling and walking as an alternative to private cars   A 2   B 2

Public transport across the region is limited, given the very low population densities that make it economically difficulty to maintain a stronger offer. There are though direct connections between the municipal "capitals" and major cities, and VMI (the public transport partner in the project) has started already to develop tourism offer bringing people to the region by coach from places as far as Lisbon, in collaboration with tour operators.

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In the last few years the three municipalities have also been developing a growing offer of routes for biking, walking, horse-riding, etc, and further investment on this is also planned (see point 6.1).

10.4 Controlling the siting and style of any new tourism development
 A 2 **B** 2

The sitting of any new tourism development is controlled by the municipalities Director Plans, that regulate building planning, land use, etc. Control of style is less regulated, but I didn't came across in the visit many cases of awkward styling. Awareness that the use of traditional building and materials provides character/identity and draws visitation is also much stronger today than in years past, and business owners tend to be very aware of it. Funding programmes also tend to consider positively the use of traditional building styles. My first night of accommodation in the region was on one such example of a small local accommodation business recreating the traditional housing style. On the other hand, one of the new hotels in the region could be considered divisive by some in terms of its architecture, but apparently is also well appreciated by others. Overall though, this is not a territory with any significant building development pressure (more likely the opposite as the population is reducing), and any potential issues over new developments will be few and far apart.

Any further comments or observations:

N/A.

Appendix A - Programme of visit, key sites and partners visited.

Time	Place	Meeting focus	Organization	Name	Job title
23rd May 2016					
09:00-11:00	Town Hall of Penamacor	Initial meeting with Technical Project Team (TPT), representing the lead partners of actions in action plan. Discussion on overall background, reasons and aims behind the Charter application, and intended objectives for the partners in the project.	ICNF – Institute of Nature Conservation and Forestry	António Cabanas e Manuela Fernandes	ICNF Technical staff
			Municipal Council of Penamacor	António Soares	Mayor of Penamacor
			Municipal Council of Sabugal	Telmo Salgado	Technical staff
			Municipal Council of Almeida	João Marujo	Technical staff
			Turismo do Centro (regional branch of national tourism agency)	Carla Basílio	Technical staff
			Historical Villages of Portugal	Dalila Dias	Coordinator
			Business Association of Sabugal	Jorge Esteves	Project Manager
			Forestry Forum	Hugo Jóia	General Secretary
			Polytechnic Institute of Guarda	Gonçalo Fernandes	Vice-president
			Territórios do Côa – Regional Development Association	Dulcineia Moura	Coordinator
			University of "Beira Interior"	Anabela Dinis	Director of MSc/MBA/ Post-Grad programmes in Entrepreneurship.
			VMI - Viúva Monteiro & Irmao, Passenger Transports	Ana Monteiro	Owner & Manager
11:00-12:30	Visit to the Malcata Nature Reserve	Discussion on actions: III.33 – Geological Heritage; I.5 - Lynx 2020; I.6 – Cynegetic Tourism; Actions I.10 – Forest Houses of Malcata; III.31 – Volunteering Camps; III.32 – Environmental Education	Geopark Naturtejo	Carlos Neto Carvalho	Science Coordinator
			Association Iberlinx	Carlos Rio Carvalho	Technical Secretary
			Municipality Penamacor	Raquel Marques	Manager
			ICNF	António Cabanas e Manuela Fernandes	ICNF Technical staff
13:00-14:45	Restaurant Esquila (Casteleiro)	Discussion of Actions I.15 "Foraging" and I.14 "Menu Raiano"	Agrup. Escolas Ribeiro Sanches	Luis Almeida	School's Group Deputy Diretor
			Restaurant Esquila	Rui Cerveira	Restaurant Owner and Manager

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Time	Location	Activity	Organisation	Name	Role
15:00-15:30	Quinta dos Rebolais (Farm in Sto. Estêvão)	Visit to traditional cheese farm. Discussion of Action I.19 "Traditional Cheesemaking"	Quinta dos Rebolais	Christina Kempenaar	Farm owner
			Meimoacoop	Carina	Coop officer
			Coopcôa	Ana Gonçalves	Coop officer
16:45-17:30	Headquarters of VMI (Passenger Transport Company, Sabugal)	Discussion with company and partners on actions: IV.38 "Booking System" and IV. 43 "Inclusive Tourism"	VMI University of Beira Interior	Ana Monteiro	Proprietária e gestora
			UBI	Anabela Dinis	Director of MSc/MBA/ Post-Grad programmes in Entrepreneurship.
20:00	Dinner in Robalo Restaurant	Discussion on background of Charter application and its objectives for the region and ICNF	Municipality of Sabugal	António Robalo	Mayor of Sabugal
			ICNF	Rui Melo	Regional Director of ICNF
24th of May 2016					
10:00	Town Hall of Almeida	Discussion on background and objectives of Charter application for Municipality of Almeida. Discussion of management structure for the Charter partnership. Discussion on Action I.8 "Culture in Gata-Malcata." Discussion on plans to extend Charter area to neighbouring Spanish municipalities.	Municipality of Almeida	António Baptista Ribeiro	Mayor of Almeida
			C.M. de Almeida	João Marujo	Town Hall technical staff
			Territórios do Côa	Dulcineia Catarina Moura	Coordenadora
			Diputación de Salamanca	Agustín Caballero	Senior Officer of Institutional Relations. Diputacion de Salamanca.
			Culture Regional Directorate of the Centre Region	Carlos Banha	Technical staff
11:15-11:30	Riding Arena of D'El Rey and stables	Discussion on Action IV.45 "Equestrian Tourism"	Municipality of Almeida; Territórios do Côa	All of the above plus Mr. Pereira	Manager of riding arena and stables
12:30-12:45	Visit to Caravan Park	Discussion on Action IV.46 "Autocaravanismo"	Territórios do Côa	All of the above.	
12:45-13:00	Visit to Almeida's Thermal Spa			All of the above, plus Xavier Espinha	Spa's manager.
13:15	Lunch in Restaurant Casa d'Irene (Malpartida)	Tasting of traditional gastronomy and continuation of discussions on plans for the Municipality.		All of the above.	
14:30-	Travel between	Travel through planned	C.M. do Sabugal	Telmo Salgado	Technical staff of Sabugal

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15:30	Malpartida e Rapoula	section of Gata-Malcata biking route described in action IV.40 – Gata/Malcata by Bike.			
15:30-16:30	Farm "Refúgio do Campo"	Discussion of actions: II.25 Naturguide Mobile App; IV.42 "Natural Offer"; IV.47. Guides' Bank; plus actions on capacity building in the regions	"Refúgio no Campo"	Otília Inácio	Owner
			Associação Transcudânia/Rotas e raizes	Ricardo Nabais	President
			Business Association of Sabugal	Daniel Simão	President
			Polytechnic Institute of Guarda	Gonçalo Fernandes	Vice-President
			A2Z Consulting/ Ytravel	Manuel Franco	Technical staff
17:00-18:00	Sortelha	Discussion of actions: II. Tourism Information Points; I.18 Etnocentro; III.29 Tourism Barometer. Final briefing and final clarifications.	Municipality of Sabugal	António Robalo	Mayor
			ICNF	Rui Melo	Diretor regional
			Historical Villages of Portugal	Dalila Dias	Coordenadora
			Association for Development of Knowledge and Information Society	José Gomes	Presidente
			Moinho do Maneio (Accomodation business)	Anabela	Proprietária
			Casas do Campanário (Accomodation business)	Luis Paulo	Proprietário

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APPENDIX B

Additional points on section A of application report, provided after the verification visit.

A7   Legal structure relating to the protected area

Indicate the type/status of protected-area authority, relationship with other relevant official bodies or local authorities.

The report presents information on the legal status of the Malcata Nature Reserve. The following contains further information on the other points above, including for the Natura 2000 site and Geopark.

The Malcata Nature Reserve has an Advisory Council with the participation of, beyond ICNF's regional manager, representatives from the two municipalities (Penamacor and Sabugal), one representative of the seven parishes the Reserve crosses, a representative of the Committee of Coordination and Development of the Central Region, a representative of the local cooperative sector (Meimoacoop), a representative from the Tourism Agency, a representative of environmental NGOs (Quercus), and other individuals of local or regional merit, etc.

Regarding the legal status of the Natura 2000 site:

Recent revisions to the Municipal Directing Plans for the the municipalities of Almeida, Penamacor and Sabugal incorporate mapping of the different "soil classes" of protected areas classified in the "municipal ecological structure." During the year 2017, through mandatory legislation, municipalities with protected and/or classified areas will carry out an "upgrade" of its regulations, integrating the normatives set in "Special Planning Plans", as is the case for the "Sectoral Plans" of Natura 2000 network and the Malcata Nature Reserve.At the moment ICNF ensures compliance with the rules set in the Sectoral Plans, not only through prior approval of projects, but also through monitoring carried out by Nature Rangers and the State's Nature Conservation Police. The municipalities also contribute to prior approval of projects by submitting their prior opinion to ICNF of all projects subject to such in classified areas.

Regarding the Geopark:

Management of the Geopark is made by an inter-municipal company NATURTEJO. The shareholders of the company include the municipalities, recreation companies, tourism agencies and hotels.Most geosites and geomonuments are located in protected and/or classified areas and are therefore subject to the same use and safeguard restrictions of those. Other sites outside of those areas are put to the consideration of local authorities to assess the interest of their classification and protection.

Ponto A8 Reason for designation (very brief description)

A8   Reason for designation *(very brief description)*

The report includes information on this for the Malcata Nature Reserve. The following includes information also for the other classified sites in the proposed Charter area:

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The "Serra da Malcata" and Natura 2000 site is the transition zone between the warmer and drier climate of Mediterranean influence in the south, and the cooler and wet climate of Continental influence in the north. The area contains well preserved examples of supra-mediterranean woodlands dominated by Pyrenean oak groves, particularly in northern areas, and small woods of holm and "medronhal" in the meso and thermo-mediterranean areas. This is an historical place of occurrence of the Iberian lynx and was created for its preservation, seeking to maintain the appropriate characteristics to promote the recovery or reintroduction of the species.

The Site goes far beyond the Malcata "Sierra", covering part of the counties of Penamacor, Sabugal and Almeida. The main ridge that separates the water basins of the Tagus and Douro rivers divides the site into two areas of different topography and land use. Reasons for classification include, beyond the lynx, the water-lizard, otter and wildcat, and this is a nesting area for threatened birds like the black stork, black vulture and eagle owl, among others. The northern part of the Site is also the southern limit of the wolf's distribution in Portugal.

Within the Natura 2000 site there is also a Zone of Special Protection (coinciding with the limits of the Nature Reserve) intended to protect a variety of birds both of mountain habitats and of wetlands, as the latter find shelter and food on the area's water dams.

The Naturtejo Geopark is an "classified area" (Law Decree 142/2008) under the UNESCO Executive Board decision (161 EX / Decisions, 3.3.1), belonging since 2006 to the National System of Classified Areas. Its priorities are geoconservation, education and geotourism, all grounded in geological heritage of reference.

Located in the southern Meseta of the Iberian Peninsula, it includes the municipalities of Castelo Branco, Idanha-a-Nova, Nisa, Oleiros, Penamacor, Proenca-a-Nova and Vila Velha de Ródão. This is a territory of high tourism potential of numerous attraction factors. It is a vast but homogenous region that offers a wide range of tourist products in its nearly 5,000 km 2 of land.

Its landscape tells the story of the last 600 million years, through elements such as large flattened areas with erupted residual granitic reliefs, sedimentary areas, tectonic alignments and quartzite ridges. The great geodiversity of the Geopark is reflected in a significant number of sites of geological interest, with 16 geomonuments as highlight key locations for the interpretation of geology.

A9 Management and staffing

Total numbers of staff. Please give organizational diagram if relevant.

The report includes information on the number of staff that works on the Nature Reserve plus an organizational diagram of the national ICNF structure. The following complements this info, with additional information on management and staffing:

The Malcata Reserve is managed jointly with other protected areas in the Central Region of Portugal by a common governance/management structure, based on a Regional Director and five Division Managers with different remits (hunting, forestry, management and value-Adding, project evaluation, monitoring, environmental education, tourism, etc). This shared management structure resulted from the last administrative reform in the country that merged forest services with nature conservation authorities. Any staff locally based in the former headquarters of the Nature Reserve is allocated to those Division Managers, depending on their technical knowledge and support the political decisions of those or from the Regional Director These Divisions are: DGOV (Division of Operational and Improvement Management), DGOF (Operational and Monitoring Division), DPAP (Division of Planning and Project Evaluation), DLAP (Division of Licensing and Project Evaluation) and DAAF (Division of Administrative and Financial Support).

Some projects in the region are also national in scope and, therefore, rely on centralized national divisions directly dependent on the Presidency of ICNF and which cuts across all

protected areas of the continent. This includes projects in aspects of tourism and communication, like for example the brand Natural.pt (also operating in Malcata).

A11   Total annual budget

Please indicate total budget of the protected-area body (including overheads and project expenditure). Explain briefly how the protected area is funded, and indicate any external resources that are regularly available.

The report explains the difficulties of calculating this for the area. When asked for further clarification, the following response was provided:

The budget is done together for the entire Central Region of Portugal (i.e. all classified regions in the region). There is a bi-annual planning of actions to be implemented, not only for the management of Protected Areas but also for other responsibilities of ICNF (e.g. fire protection, protected species, land management, combating biotic agents, tourism signage, promotion, etc). Not only is budget shared across all of these, as is also the use of resources, including technical, technological, logistic and human.

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