

## ESTABLISHMENT OF NATURA 2000 NETWORK



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# Guidelines for the management of Natura 2000 sites

March 2019



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### Authors

<b>Prepared by</b>	Erika Stanciu, ProPark Foundation for Protected Areas, based in Brasov, Romania ( <a href="http://propark.ro/en/despre-noi.html">http://propark.ro/en/despre-noi.html</a> )
<b>Quality assurance</b>	Elisabeth (Sissi) Samec

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## List of abbreviations

AA	Appropriate Assessment
EU	European Commission
EU	European Union
IUCN	International Union for the Conservation of Nature and Natural Resources
NGO	Non-governmental Organization
PA	Protected Area
SDF	Standard Data Form

## Definitions and key terms used in text

<b>Habitat Directive</b>	COUNCIL DIRECTIVE 92/43/EEC on the conservation of natural habitats and of wild fauna and flora
<b>Birds Directive</b>	COUNCIL DIRECTIVE 79/409/EEC on the conservation of wild birds, modified through 2009 (2009/147/EC)
<b>Biogeographical Region</b>	The largest regions of animal and plant assemblages are biogeographical regions, each bearing a distinctive fauna and flora. Some families and even some orders of animals are endemic to particular biogeographical regions <sup>1</sup>  Geographically defined region, where "the issues and problems affecting habitats and species" are similar due to region-al factors such as climate, landscape or soil conditions. <sup>2</sup>
<b>IUCN</b>	International Union for the Conservation of Nature and Natural Resources
<b>NGO</b>	Non-governmental Organization
<b>PA</b>	Protected Area
<b>SDF</b>	Standard Data Form

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<sup>1</sup> Richard Huggett, The University of Manchester, Manchester, UK, United Kingdom - <http://www.els.net/WileyCDA/ElsArticle/refId-a0003231.html>

<sup>2</sup> [http://ec.europa.eu/environment/nature/natura2000/biogeog\\_regions/](http://ec.europa.eu/environment/nature/natura2000/biogeog_regions/)

## EXECUTIVE SUMMARY AND OUTLINE OF THE MAIN CONCLUSIONS AND RECOMMENDATIONS

The process of establishing the Natura 2000 Network has started in Montenegro. The designation process is requiring significant resources and time and most of the relevant institutions and the experts will be involved intensely in this process before the accession. However, a good understanding of the Natura 2000 site management requirements could help significantly the designation process, as well as the process of preparing the legal framework for the management arrangements.

These guidelines are summarizing the main requirements for the management of individual Natura 2000 sites and are presenting what should be carefully considered when preparing the framework for management.

Natura 2000 site management has as a key objective to maintain species and habitat types of community interest in a Favourable Conservation Status (FCS) at the Biogeographical level. What this entails in terms of conservation management is presented using examples from a simple case study. Appropriate Assessment and zonation are presented as management tools and their importance explained in the document.

However, the conservation objective needs much more than conservation management. Natura 2000 managers will have to understand and work closely with the stakeholders, especially those linked to local communities. One of the aims of the Natura 2000 network is to contribute to sustainable development, therefore, community outreach work and participatory management will be of paramount importance in these sites. Basic guidance is presented for stakeholder involvement and the importance of participatory management and community outreach work is highlighted in this document.

The Natura 2000 network will need public support and a very good understanding of its importance by stakeholders. Therefore, education and awareness raising should be considered as management domains for the site management.

Based on experiences of Member States of the European Union, some recommendations are made in the final chapter to help preparation for Natura 2000 site management. A key aspect to consider is to define who will have management responsibilities at the site level and what will be the mechanisms to allow stakeholder participation in the decision making process and in the management activities. The recommendation is to think about a system that allows for active involvement of various stakeholders. This recommendation brings with itself another one: stakeholders with a key role in the management of Natura 2000 sites will need capacity building programmes that will increase their competences for management aspects that are of key importance. A comprehensive capacity building programme should be developed, looking to various topics, including ecology, natural resource management, communication, fundraising, nature education and awareness raising.

Although some Member States are not considering Natura 2000 sites as part of the national protected area network, it should not be ignored that in most cases planning for conservation management is very similar with the protected area management planning system. Site management can be done efficiently only if complex management measures are planned. Therefore, participatory management planning is of paramount importance for the future Natura 2000 sites, even if the European Commission does not require management plans dedicated to individual sites.

Given that landowners and natural resource managers might have some restrictions in the use of their agricultural land and forests for the benefit of the target species and habitat types, compensation payment systems have to be planned in the early stages on Natura 2000 preparation and implementation.

The guidelines are built around a simple case study that should help the understanding of provisions from the Habitat and Birds Directives related to the site management. Besides the requirements from the directives, recommendations deriving from experiences of other countries are used to guide future management arrangements in Montenegro. Thus, the guidelines should help decision makers to set up the framework for effective and efficient

management, future managers to plan for participative management and stakeholders to prepare for active engagement in the management of the future Natura 2000 sites.

## INTRODUCTION

These guidelines are presenting in a succinct manner what should be done for the effective and efficient management of the future Natura 2000 sites. With the European Union (EU) accession planned only in a few years' time, it might seem that these guidelines are premature. However, experience of other countries demonstrates that an early understanding of the needs and implications of Natura the 2000 site management would significantly help the preparation process. Even with a well prepared and conducted site designation process, lack of appropriate legal framework for the actual management of the sites and lack of well-designed management arrangements might lead to conflicts with various stakeholders and might hinder the effectiveness of the Natura 2000 network.

This document should be of interest and useful for those working with the responsible authorities for Natura 2000 sites, for site managers and stakeholders in Montenegro. For the time being these target groups might not be well defined yet. However, the national authority in charge for the site designation is established. There is an acceptance of the fact that existing protected areas are very likely going to be included or at least partly overlapping with Natura 2000 sites. Therefore, for those working for the responsible national and regional authorities and for the existing protected areas, the guidelines should be useful for fulfilling their tasks in the preparation process and for planning future management. It should be also understood in these early stages that landowners, resource administrators will certainly have a very important role in the management of the future Natura 2000 sites, therefore they should understand what will be the future management requirements. There are also several other actors who can significantly contribute to the awareness and education process for the Natura 2000 network and who might seek resources to better understand the network and site management issues.

The guidelines are presented using a theoretical case study developed to help explaining the main aspects of the Natura 2000 management. This "Guideline Case Study" constitutes the support material for all the theory and explanation throughout the document.

The information from these guidelines is structured with the help of colour shaded text and text boxes:

Boxes. Provide background information, definitions. They are lightly shaded in blue

Boxes. Provide examples from other countries or explanations to the text to which they are linked through the box number. These are lightly shaded in blue and have double black borders.

Boxes. Provide examples related to the Guideline Case Study. These are lightly shaded in green, with double black borders

Text related to the Guideline Case Study (see Chapter 1), has a light green vertical strip aligned to the left.



# 1. THE “GUIDELINE CASE STUDY”

The guidelines are built around an example, the “Guideline Case Study”, called hereafter The *Case Study*, which is presented in this chapter.

The *Case Study* is meant to facilitate a better understanding of the management requirements and approaches for the Natura 2000 sites and their impact on the present, on-going land and resource management practices.

Throughout the guidelines, the case study will be used to explain each chapter. Whenever the *Case Study* is used, the text will have a light green vertical strip aligned to the left.

## 1.1 BRIEF DESCRIPTION OF THE CASE STUDY NATURA 2000 SITE

The “Case Study” is about an imaginary Natura 2000 site represented in the figure below. The site is covering several land-use types: forests, agricultural land of which part are wet meadows/pastures, a river with rich vegetation on the banks forming a continuous ecological corridor, a wetland.

The Standard Data Form of the site lists the following species and habitats of community interest for this site:

- Species:
  - *Pernis apivorus* – honey buzzard
  - *Ciconia ciconia* – white stork
  - *Crex crex* – corncrake
  - *Lutra lutra* – otter
- Habitats
  - 9110 *Luzulo-Fagetum* beech forest
  - 7230 Alkaline fens

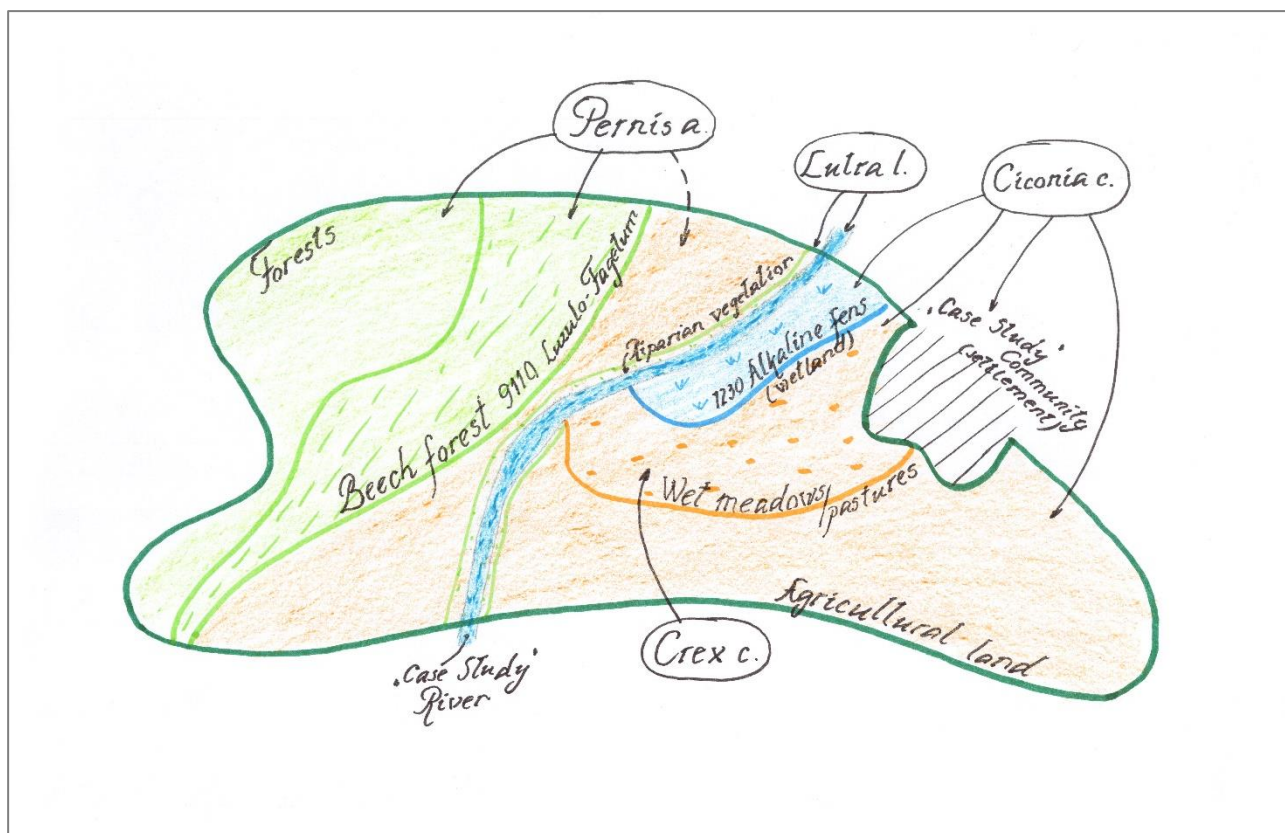
The honey buzzard uses the forests for nesting and feeding. It feeds mainly with insects in the forests, insects that are often depend on dead wood, especially with larvae and nests of wasps and hornets. During spring, when insects are scarce, the buzzard might use the agricultural land for feeding, where it needs to find small mammals, reptiles and birds. It nests on large trees. It nests mainly between the 25th of April and the 15th of August.

The corncrake is completely dependent on the wet hay meadows and pastures, where it nests. Its youngsters leave the nest around the 31st of July.

The white stork is dependent on the wetland and the wet hay meadow for feeding, but also uses intensively the other agricultural land. It nests sometimes at the edge of the forest and partly in the Case Study Community on electricity poles and chimneys. The breeding strategies of the white stork has changed during the past decades: a decreasing number of individuals nest on traditional nest sites – trees, roofs, chimneys, whereas electricity poles are increasingly selected. Originally the White Storks build their nests in old trees and rocks, today its more domesticated descendants usually choose roof-tops or tall chimneys.

The otter uses the river for feeding and the banks of the river, as well as the vegetation along the river for shelter and reproduction places.

Figure 1. Map and target species and habitats in the Case Study Natura 2000 site



## 1.2 CONSERVATION MEASURES FOR THE CASE STUDY NATURA 2000 SITE

Conservation measures<sup>3</sup> are established based on the ecological requirements/needs of the target species and habitats. The table below presents the direct conservation measures that have to be taken, based on the requirements described in Chapter 1.1. The table also presents some of the support measures that have to be secured by the regional and/or national authorities to secure proper implementation of the conservation measures.

Colour codes in the table are as follows:

Conservation measures and support measures implemented at the:	Responsible stakeholder groups:
Site level	YYY Site level
Regional level	YYY Regional level
National level	YYY National level

Table 1. Conservation measures in the Case Study Natura 2000 site (below)

<sup>3</sup> Guidance for establishing conservation measures are given by the EC in "commission note on establishing conservation measures for Natura 2000 sites", [ec.europa.eu/environment/nature/natura2000/management/docs/commission\\_note/comNote%20conservation%20measures\\_EN.pdf](http://ec.europa.eu/environment/nature/natura2000/management/docs/commission_note/comNote%20conservation%20measures_EN.pdf)

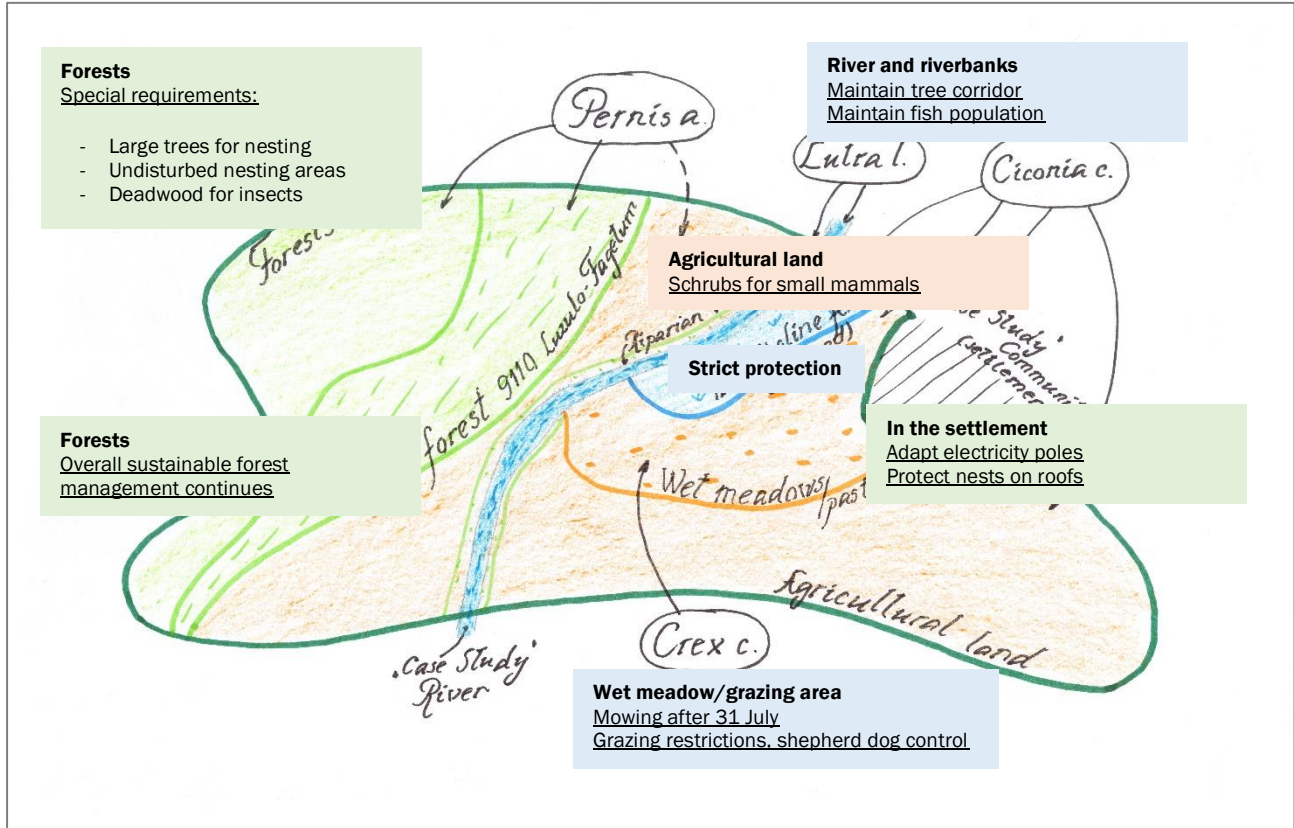
	Species, habitats of EU interest					
	<i>Pernis apivorus</i>	<i>Ciconia ciconia</i>	<i>Crex crex</i>	<i>Lutra lutra</i>	Wetland 7230	Beech forest habitat 9110
<b>FORESTS</b>						
<b>Forest managers and owners</b>	Maintain large trees for nesting	Maintain large trees on the forest edge for potential nesting				Management promoting natural regeneration
	Maintain deadwood as habitat for insects					
	<b>SITE LEVEL</b>	<b>SITE LEVEL</b>				<b>SITE LEVEL</b>
	Undisturbed nesting places – at least 100 m radiant around the nest for core area (no activities at all in the nesting period) and a buffer of about 300 m (no tree harvesting in the nesting period): 25th of April - 15th of August.					
	<b>SITE LEVEL</b>					
<b>AGRICULTURAL LAND</b>						
<b>Farmers, landowners</b>	Maintain Shrubs and some trees (groups of trees) that are offering place for pray species - about 10 - 20% of the area	Maintains hay meadows, wet pastures, wetlands, lands for crops	For wet grasslands used as hay meadows – mowing after the 31 July  For wet grassland used for grazing, grazing should be allowed after the 31 July  Control shepherd dogs Reduce/eliminate use of chemicals			
	<b>SITE LEVEL</b>	<b>SITE LEVEL</b>	<b>SITE LEVEL</b>			
	Reduce/eliminate use of chemicals (it reduces the pray)			Reduce/eliminate use of chemicals in the vicinity of the river and the wetland		
	<b>SITE LEVEL</b>			<b>SITE LEVEL</b>		

<b>National authorities responsible for Agriculture and for Environment</b>	Compensation payments				
	NATIONAL LEVEL				
<b>Water Authority</b> <b>Local/regional authorities</b>	Do not plan for land-use change for development or other purposes.			Do not plan for land-use change for development or other purposes.	
	REGIONAL LEVEL			REGIONAL LEVEL	
<b>WATER AND RIPARIAN HABITATS</b>					
<b>Game and fish managers</b>				Maintain fish population (pray) (need: 1-1,5 kg/night/otter)	
				SITE LEVEL	
<b>Water Authority</b>		Do not reduce flooding areas along rivers more than necessary for security		Tree and shrub vegetation along the river (one individual uses about 12 - 22 km)	
		REGIONAL LEVEL		REGIONAL LEVEL	
<b>WETLAND</b>					
<b>Landowners/Managers</b>		Maintain the area		Maintain the area	
		SITE LEVEL		SITE LEVEL	
<b>Local/regional authorities</b>		Do not plan for land-use change for development or other purposes.		Do not plan for land-use change for development or other purposes.	
		REGIONAL LEVEL		REGIONAL LEVEL	
<b>OTHER</b>					
<b>Local/regional authorities</b>	Avoid windmills on migration corridors	Roof reconstruction of buildings protect nests			

		Electricity poles with supporting structures for the nests				
	REGIONAL LEVEL	REGIONAL LEVEL				
National authorities	Avoid windmills on migration corridors					
	NATIONAL LEVEL					

Figure 2 presents the management measures proposed for the Case Study site, based on the conservation measures defined in Table 2.

**Figure 2. Conservation measures and support measures needed to maintain the species and habitats of community interest in “Case Study” Natura 2000 site**



## 2. NATURA 2000 SITE MANAGEMENT – GENERAL CONTEXT AND RECOMMENDED APPROACH

### 2.1 EU NATURE DIRECTIVES - THE FRAMEWORK FOR MANAGEMENT

#### 2.1.1 CONSERVATION MANAGEMENT - THE KEY MANAGEMENT DOMAIN

The overall objective for the Natura 2000 network across the EU is to maintain species and habitats of community interest in a Favourable Conservation Status (FCS) at the Biogeographical level.

##### Box 1. Favourable Conservation Status

###### **Favourable Conservation Status of species and habitats of community interest**

For each of the species and habitats of community interest there is a *Favourable Conservation Status (FCS)* defined at the Biogeographical level.

Each of the sites in the Natura 2000 network has to contribute to the FCS by maintaining an *excellent or a good conservation status* at the site level for the species and habitats for which the sites were designated.

Every six years, a comprehensive monitoring report has to be submitted by the responsible national authority to the EU, where an assessment of the conservation status is made for each of the species and habitats at the Biogeographical level<sup>4</sup>.

The overall, key management objective at the level of a Natura 2000 site is to maintain the species and habitats included in the Standard Data Form (SDF) in an excellent or good conservation status. Thus, the site contributes to maintaining the Favourable Conservation Status at the Biogeographical level of these species and habitats. Therefore, the primary management domain in a Natura 2000 site is conservation management.

At the “Case Study” site level the key conservation objective is to maintain the good conservation status for species and habitats of community interest listed in the SDF. This is being achieved through:

- the conservation management of habitats and species of community interest, and
- the conservation management of the species and habitats that are important for the species and habitats of community interest

##### Box 2. Conservation management

**Conservation management** refers to the implementation of the conservation measures established on the basis of ecological requirements and characteristics of the targeted species and habitats.

**Conservation management** in Natura 2000 sites aim to:

- A) maintain or improve the conservation status of targeted species and habitats through:
  - a) regulating natural resource management and other human activities to prevent and reduce pressures and threats, i.e.:
    - i by making sure that resource management activities are not affecting the species and habitats and/or they are supporting them
    - ii preventing activities that might have a negative impact on the species or habitats - through zonation and through Appropriate Assessment (AA)

<sup>4</sup> The last report on the conservation status of species and habitats of community interest is available at [http://ec.europa.eu/environment/nature/knowledge/rep\\_habitats/index\\_en.htm](http://ec.europa.eu/environment/nature/knowledge/rep_habitats/index_en.htm)

- b) strict protection of target species and habitats
- B) improving the conservation status of target species and habitats through ecological restoration - for the species and habitats that are considered to be in "average or reduced conservation status" (see SDF)<sup>5</sup>.

**Box 3. Favourable Conservation Status**

**Conservation management in the „Case Study” site is based on the conservation measures that are presented in Table 1 (see Chapter 1.2).**

- the wetland habitat type 7230 has to be maintained through strict protection
- for the habitat type 9110 *Luzulo-Fagetum* beech forest the management practices that aim to maintain natural compositions and secure natural regeneration that maintains the habitat, should be continued
- preventing activities that might have a negative impact on the species or habitats through **zonation or Appropriate Assessment**

The conservation management has to address also the species and habitats that are not of community interest, but are important for key conservation objective of the site.

**Box 4. Conservation management of species and habitats that are important for the species and habitats of community interest**

Conservation management measures addressing species and habitats that are not of community interest, but important for the key conservation objective could be, for example:

1. To maintain the good conservation status of *Lutra lutra*, the river habitat and fish population has to be maintained in a good conservation status, as well as the tree corridor along the river. These are not listed as habitats or species of community interest in the Case Study Natura 2000 site, but are very important for the conservation objectives.
2. If due to climate stress the area of the wet meadows and pastures are declining, restoration projects should be developed and implemented to bring water from the river to the area. Even if this type of habitat is not in the SDF of the site, this is a critical habitat for corncrake, hence the need to maintain it.
3. Overall forest management has to secure the presence of large trees relatively close to the edge of the forest (to the agricultural land) for the honey buzzard and possibly for the white stork.
4. Farmers should maintain 10-20% of shrubs and individual trees or groups of trees on their land, so that small birds and mammal population are providing enough food for the honey buzzard in the spring.

**Zonation** is a management tool that is often used in protected area of national interest. Clearly defined zones in a Natura 2000 site, especially for large and complex areas, will help stakeholders to understand the management requirements of the site and to adapt their activities to the rules established for each zone. Effective zoning instrument means to have maps with detailed and clear boundaries of the various zones and a detailed description of the restrictions that apply in each of the zones. The restrictions should also have a simple and clear explanation on why they were established.

Zonation is done based on scientific data, i.e. species and habitat mapping, studies and the ecological requirements of the target species and habitats, but taking in consideration the socio-economic context, i.e. considering the needs of landowners and local communities. Therefore, zonation decisions should be closely linked to

<sup>5</sup> Natura 2000 - Standard Data Form, Explanatory Notes,  
[http://ec.europa.eu/environment/nature/legislation/habitatsdirective/docs/standarddataforms/notes\\_en.pdf](http://ec.europa.eu/environment/nature/legislation/habitatsdirective/docs/standarddataforms/notes_en.pdf)



compensation payments or other compensation mechanisms wherever restrictions might bring economic losses to landowners.

The European Commission (EC) accepts and recommends zonation wherever it is considered to be a useful management tool<sup>6</sup>.

**The Appropriate Assessment** is an important tool for the conservation management of Natura 2000 sites. This assessment is part of the Environmental Impact Assessment (EIA) required<sup>7</sup> for any plans or projects that might adversely impact the environment, in or outside a protected area and/or a Natura 2000 site. According to the existing legal requirements, “for projects, activities and actions for which EIA is not required, Appropriate Assessment shall be prepared and the Environmental Protection Agency implements the procedure”.

The appropriate assessment evaluates the potential impact of a plan or project in a Natura 2000 site on the species and habitats of community interest.

#### Box 5. Appropriate assessment

Appropriate assessment, as part of the Environmental Impact Assessment procedure or a separate procedure where EIA is not required is an assessment of the potential impact of plans and project that are not directly connected or necessary to the management of the site and looks to its implications for the site’s conservation objectives<sup>8</sup>.

According to the Habitat Directive, “an Appropriate Assessment must be made of any plan or project likely to have a significant effect on the conservation objectives of a site which has been designated or is designated in future”.

This assessment should be done considering the plans or projects “either individually or in combination with other plans or projects”.

The figure below shows the type of projects that might need Appropriate Assessment<sup>9</sup> in the “Case study” Natura 2000 site. If zoning is applied for the “Case Study” site, the zones and associated recommendations would be the following:

- **Zone A – Strict protection zone.** Includes the wetland area, where no human intervention is permitted. Ecological restoration projects might be allowed if the conservation status of the wetland requires it.
- **Zone B – Crex nesting area.** Includes wet hay-meadows used by *Crex crex* for nesting. Should be maintained as hay meadows. Mowing will start only after the 31st of July.
- **Zone C – Vegetation corridor along the river and the river habitat.** The vegetation should be maintained, with low intensity interventions on the tree cover if necessary. If major projects are needed, subject to Appropriate Assessment, the minimum requirements to maintain the *Lutra lutra* habitat is: requirements should be clearly defined). Fish population should not be affected.
- **Zone D – nesting area for *Pernis apivorus*.** Access and activity restrictions should apply in the nesting period, 25th of April - 15th of May.

<sup>6</sup> See, for example, *Guidelines on Wilderness in Natura 2000* - Management of terrestrial wilderness and wild areas within the Natura 2000 Network, European Union 2013 (see especially Chapter 4.2.6. Measure 1) -

<http://ec.europa.eu/environment/nature/natura2000/wilderness/pdf/WildernessGuidelines.pdf>

<sup>7</sup> Law on Nature Protection, OG 054/16, articles 46 - 53

<sup>8</sup> Habitat Directive, Article 6, para 3

<sup>9</sup> Contrary to other EU directives prior selection of plans and projects is forbidden, i.e. approving lists of plans and projects is not allowed, all assessments have to be done for each project/plan separately.

With these zones defined plan and project initiators will know, before deciding if they initiate a project and go for a resource consuming Appropriate Assessment, the following:

- no development projects will be accepted in Zone A
- extension of the “Case study” settlement will not be possible into Zone B.
- any projects affecting Zone C will have to be carefully planned to comply with the Natura 2000 objectives
- projects potentially affecting Zone D have to consider those restrictions: for example, a tourist trail should avoid the nesting areas.

All plans and projects initiated in the Natura 2000 site will have to undergo Appropriate Assessment, except, perhaps, the tourism trail development – see Figure 3.

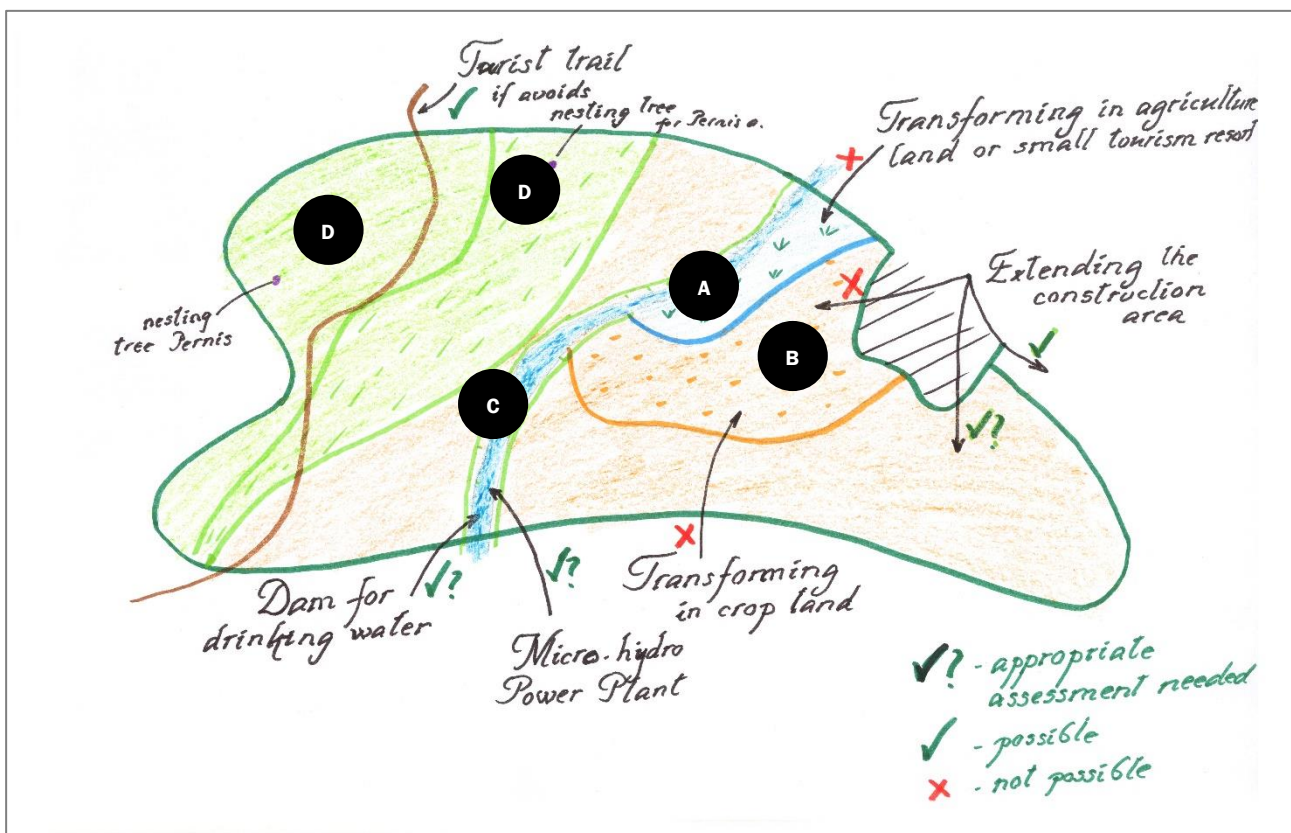


Figure 3. Projects/plans that need appropriate assessments in the “Case Study” Natura 2000 site

## 2.1.2 OTHER MANAGEMENT DOMAINS AT SITE LEVEL

Besides the **Conservation Management Domain**, which is the primary management domain for a Natura 2000 site (see Chapter 2.1.1), for some or most of the Natura 2000 sites there is a need for other management domains, as well. Conservation cannot be achieved solely through conservation management.

To achieve the key conservation objective the Habitat<sup>10</sup> and Birds<sup>11</sup> Directives are establishing the framework for the management of Natura 2000 sites. Summarizing the main provisions of the Directives, three main themes can be distilled down for the management of the sites that are included in the Natura 2000 network:

- I. **Conservation management of habitats and species of community interest.**
- II. **Sustainable development of local communities.** Conservation of habitats and species is needed to maintain the life support of the society and the natural resources needed for sustainable development. Furthermore, engaging local communities in the conservation activities and providing information and support for sustainable development is of critical importance for the Natura 2000 network. Management objectives and actions planned and implemented under this theme have to look to all the aspects of sustainable development, from land-use and territorial planning, to strategic planning and the way plans and projects are being implemented in the Natura 2000 sites (using the Appropriate Assessment tool).
- III. **Awareness raising and education** on the importance of biodiversity conservation and on the role of Natura 2000 is a theme that has to be addressed in the management of Natura 2000 to secure an effective and efficient network on the long term.

Each of the three themes should be considered at the local, site level, except for sites that are very small. These themes can be translated in the following management domains and subdomains:

- I. Conservation management (the primary management domain) might be transposed in the following:
  - Management of species and habitats of community interest through:
    - Forest management
    - Management of fauna of hunting interest
    - Agricultural land management
    - In-land water management
    - Management of marine habitats and species
    - Infrastructure and settlement development / rehabilitation
- II. Sustainable development (secondary management theme) covering, as necessary, the following domains:
  - Territorial planning (land-use planning)
  - Development policies
  - Community development and outreach
- III. Awareness raising and education (secondary theme) that includes usually both:
  - Awareness raising programmes and
  - Education programmes.

Other domains might be relevant or not, like, for example, tourism management. For a site in which tourism is already developed and might even be a threat for the conservation objectives, visitor management becomes critical. For sites which offer good opportunities for tourism linked to the natural and cultural values, it is important to have proper planning and development, in accordance with the conservation objectives. Ecotourism development might be an important part of local development for some of the sites.

<sup>10</sup> COUNCIL DIRECTIVE 92/43/EEC on the conservation of natural habitats and of wild fauna and flora

<sup>11</sup> COUNCIL DIRECTIVE 79/409/EEC on the conservation of wild birds

In the “Case Study” site the following management domains could be relevant, besides the conservation management one:

- Awareness raising and education programmes should help with:
  - having conservation measures accepted and implemented by land owners, foresters, farmers, game managers, water managers, etc.
  - showing local communities the values of the Natura 2000 site and the development opportunities that might be linked to these,
  - educating children and youth in the respect of natural values and to learn how to use these without damaging them,
  - educate and involve the general public from areas outside the site on the Natura 2000 objectives and nature conservation.
- Community outreach – to support sustainable development projects related to the Natura 2000 objectives. This domain should have measures like: support locals to develop small businesses based on the responsible use of natural resources and incorporating traditional knowledge in their businesses, develop and support the promotion of a local brand, etc.
- Visitor management – if the site is situated in an attractive landscape and/or already attracts lots of visitors, tourism trails and/or other infrastructure has to be designed in accordance with the objectives of the site. For example, trails will avoid sensitive habitats or species reproduction areas. The site managers also have to monitor visitor impacts on target species and habitats. Tourism programmes and plans developed at the regional level by other stakeholders will have to be harmonized with the site objectives. Therefore, this domain will need specialized staff and financial resources allocated.

### 2.1.3 SUPPORT MEASURES AT THE REGIONAL AND NATIONAL LEVEL

Successful management of a Natura 2000 site depends not only on the site level management. Providing a well-established framework at the national level is a key condition for the effective management of Natura 2000 sites. Regional planning and projects can also be important and/or provide substantial support for management actions planned under some of the themes.

#### **National level measures and projects**

Providing the **legal framework at the national level** for the management of the Natura 2000 network is obligatory for every Member State and a critical condition for the effective management of the Natura 2000 sites. This entails:

- the transposition of the EU Directives into laws that govern / influence the establishment and management of Natura 2000 sites and
- the harmonization of the relevant sectoral legislations and strategic plans with the Natura 2000 legislation and with the requirements deriving from conservation measures established for species and habitats of community interest. Thus, for example, the Forestry Law and the National Forest Strategy should be adapted to reflect the Natura 2000 requirements. The same should apply for the entire legislation and strategic plans that are developed for the do-mains listed under each of the main themes presented above.

Other national level measures of key importance for the management of the Natura 2000 sites are the **compensation payments**. Such schemes have to be developed to cover economical losses deriving from restrictions applied at the site level - see example in Box 6. The EU is providing financial re-sources to support the Natura 2000 sites. However, the Member State can use the allocated money only if it establishes the internal mechanisms for this process. Many of the EU countries could not use the opportunity of providing compensation payments, because the payment schemes are not yet established at the national level.

The implementation of some of the conservation measures in the “Case Study” Site depend on national level measures. This would be the case with the restrictions applied to Zone B, where land owners will lose some of their benefits because of late mowing of the hay. Compensation payments are due for this restriction and should be established at the national level, with support from the EU. Such a compensation payment should be part of a Natura 2000 payment scheme, for which the EU allocates a budget for each Member State.

#### Box 6. Example of compensation payment

Romania tested compensation payments for the conservation of *Crex crex*, as part of the Agri-environment Measures. Farmers with a voluntary commitment to respect several management restrictions, received **281 €/ha** for maintaining the wet pastureland used by the corncrake. These restrictions included: no use of chemicals, use of natural fertilizers in quantities and concentration indicated by the authorities, mowing the hay after the 31st of July or grazing respecting the number of grazing animals established by the specialists.

**National level action plans** and the **national level monitoring plan** will provide an important framework for the concrete conservation measures at the site level – see example in Box 7.

#### Box 7. Example of action plans

In Romania two national action plans were approved in 2018 at the national level: The National Action Plan for *Canis lupus* (wolf) and The National Action Plan for *Ursus arctos* (bear). Both action plans were developed within projects co-funded by the EU, with only 25% of the costs covered by the Ministry of Environment of Romania. The draft plans were developed by experts coordinated by an Environmental Agency and an NGO for the wolf and by a forest research institute in cooperation with the Ministry of Environment and partners from the NGO and private management sector, as well as with the support of local public authorities for the bear. Stakeholder consultation processes were conducted, including an official public hearing, to secure proper stakeholder involvement. Both action plans were approved through ministerial orders, thus becoming the national strategic document for the management of populations of these two species.

Action plans are also being developed at the EU level like, for example, the Action Plan for the Conservation of All Bat Species in the European Union 2018 – 2024

[http://ec.europa.eu/environment/nature/conservation/species/action\\_plans/pdf/EU%20Bats%20Action%20Plan.pdf](http://ec.europa.eu/environment/nature/conservation/species/action_plans/pdf/EU%20Bats%20Action%20Plan.pdf)

National level projects will also support site management objectives. For example, national level projects can provide support to site managers through well designed and well targeted awareness raising programmes, education programmes and capacity building programmes.

#### **Regional level measures and projects**

At the regional level:

- territorial planning and development policies have to be harmonized with the management objectives of the Natura 2000 sites,
- local community support programmes can reflect and prioritize the management needs outlined in the Natura 2000 management plans,
- support programmes can and should be developed for the sustainable development of local communities included or affected by the Natura 2000 sites.

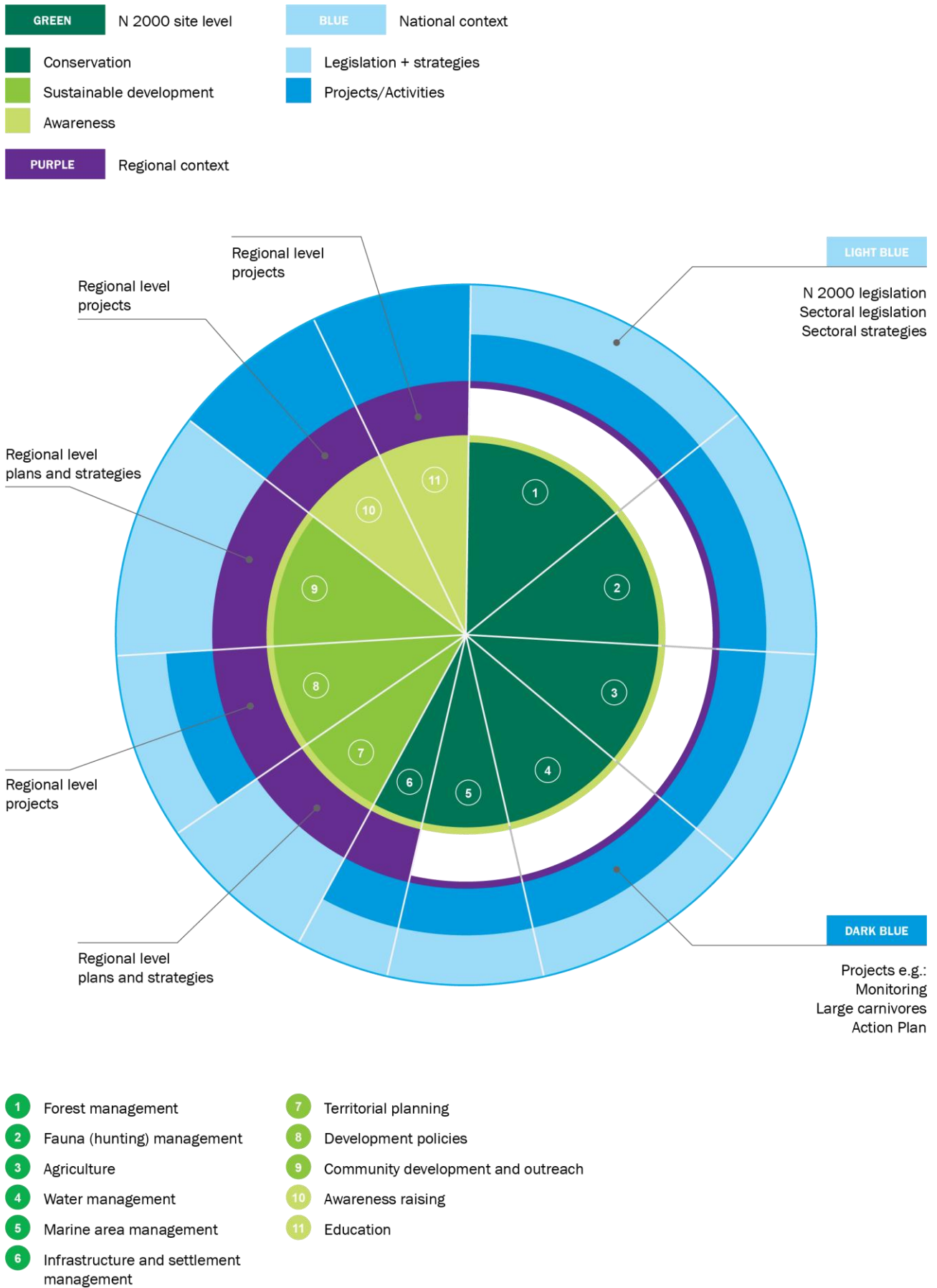
**Box 8. Regional level measures - examples from the “Case Study” Site**

The Regional Territorial Plan has to present the borders and the objectives of the “Case Study” site and to reflect the management measures. The management zones defined for the site might significantly help this harmonization process between the territorial plan and the objectives of the site. Thus, the Territorial Plan will not include provisions for infrastructure development in Zone A and will carefully consider scenarios for infrastructure development.

Furthermore, regional level decision makers can develop community support programmes that are in line with the objectives of the Natura 2000 site. One obvious example in this sense would be the regional level awareness raising and education programmes that can very effectively complement the efforts of individual Natura 2000 management teams.



**Figure 4. Management domains and support measures for Natura 2000 sites**



## 2.2 MANAGEMENT APPROACHES

Article 6 of the Habitat Directive states that for Natura 2000 sites “Member States shall establish the necessary conservation measures involving, if need be, appropriate management plans specifically designed for the sites or integrated into other development plans, and appropriate statutory, administrative or contractual measures which correspond to the ecological requirements of the natural habitat types in Annex I and the species in Annex II present on the sites.”

Thus, the two approaches recommended in Article 6 are:

- a) a management plan specifically designed for the site is developed and implemented.
- b) conservation measures for the site are integrated into other development plans.

These recommendations lead to different management approaches:

- ***The management responsibility is in the hands of a designated management entity***

The management entity has the responsibility of developing and of coordinating the implementation of the Natura 2000 management plan. The management entity can be a dedicated management team or an entity that has the responsibility of the management of Natura 2000 site as one of its responsibilities.

This management entity/team can be one that is established by the responsible authority (Ministry of Sustainable Tourism and Development) and is part of a **centralized management system**. Or, some of the stakeholders can be delegated by the responsible authority to manage Natura 2000 sites, based on a contract. This second option is considered to be a **delegated management system**. Critical assumptions for a system in which stakeholders have the delegated responsibility for Natura 2000 management are presented in Chapter 4.1. Table 4. Examples of management arrangements are presented in Box 9 below.

### Box 9. Delegated and participatory management approaches in Romania

Some of the Natura 2000 sites in Romania had, between 2008 and 2018 dedicated teams established by a non-governmental organization. The NGO was subcontracted by the Ministry of Environment for the management of the site. The management team had the responsibility to develop the management plan and coordinate the management planning process and to coordinate the implementation of the plan. Based on the requirements of the management plan, stakeholders had to adapt their plans and management to the provisions of the Natura 2000 site management plan, according to the legal requirements of the Protected Area Law. Thus, stakeholders took over the responsibility to contribute to the maintenance or restoration of the good or excellent conservation status for the target habitats and species.

Some other Natura 2000 sites were managed by local forest entities that are having the overall forest management responsibility. In these cases, staff members of the forestry entity received specific Natura 2000 responsibilities alongside other, forest management related tasks. Often one staff member had responsibilities for several small Natura 2000 sites. The Natura 2000 management performances of these forest management entities depended, obviously, on the resources allocated for Natura 2000 sites. Partnership with other entities, especially conservation NGOs and universities were, in most cases, beneficial.

In the case of large and complex Natura 2000 sites, the management entity (NGO or forest unit or other) had the responsibility to secure stakeholder participation by establishing:

- a Consultative Council with the representatives of key stakeholders. This platform provided the opportunity to inform and involve the stakeholders in the management process,
- a Scientific Council with experts in protected area management and in their domains relevant for the site. This council provided the technical expertise needed for informed strategic decisions for the site management.

### Box 10. Centralized management approach in Hungary



The Hungarian approach is a model for the centralized approach: Natura 2000 sites are managed by the National Park Directorates. Each National Park Authority has responsibilities for a certain region and manages all protected areas in that region, including Natura 2000 site. These National Park Authorities are established under the Ministry of Rural Development, National Park and Landscape Protection and Nature Conservation Departments.

- ***Stakeholders managing the land/resources are responsible for implementing the conservation measures***

In this case, each of the **stakeholders** with activities in the Natura 2000 site has the obligation to incorporate the management measures in its own plans and management practices. Sectoral management approaches have to be adapted to the needs of the species and habitats of community interest. Private landowners, who are individually managing their land, would have to be approached by state authorities responsible for Natura 2000 for contractual agreements related to the conservation measures they have to apply on their land. If these measures go beyond the existing legal requirements, compensation payments will have to be agreed in these contracts.

A key challenge in this situation is to harmonize and coordinate the plans and activities of all stake-holders and secure the effective overall management of a site. In this situation there are management domains that might not be covered by any of the stakeholders, like e.g. community outreach and support for sustainable development or awareness raising and education or tourism development (see Table 3, Chapter 4.1).

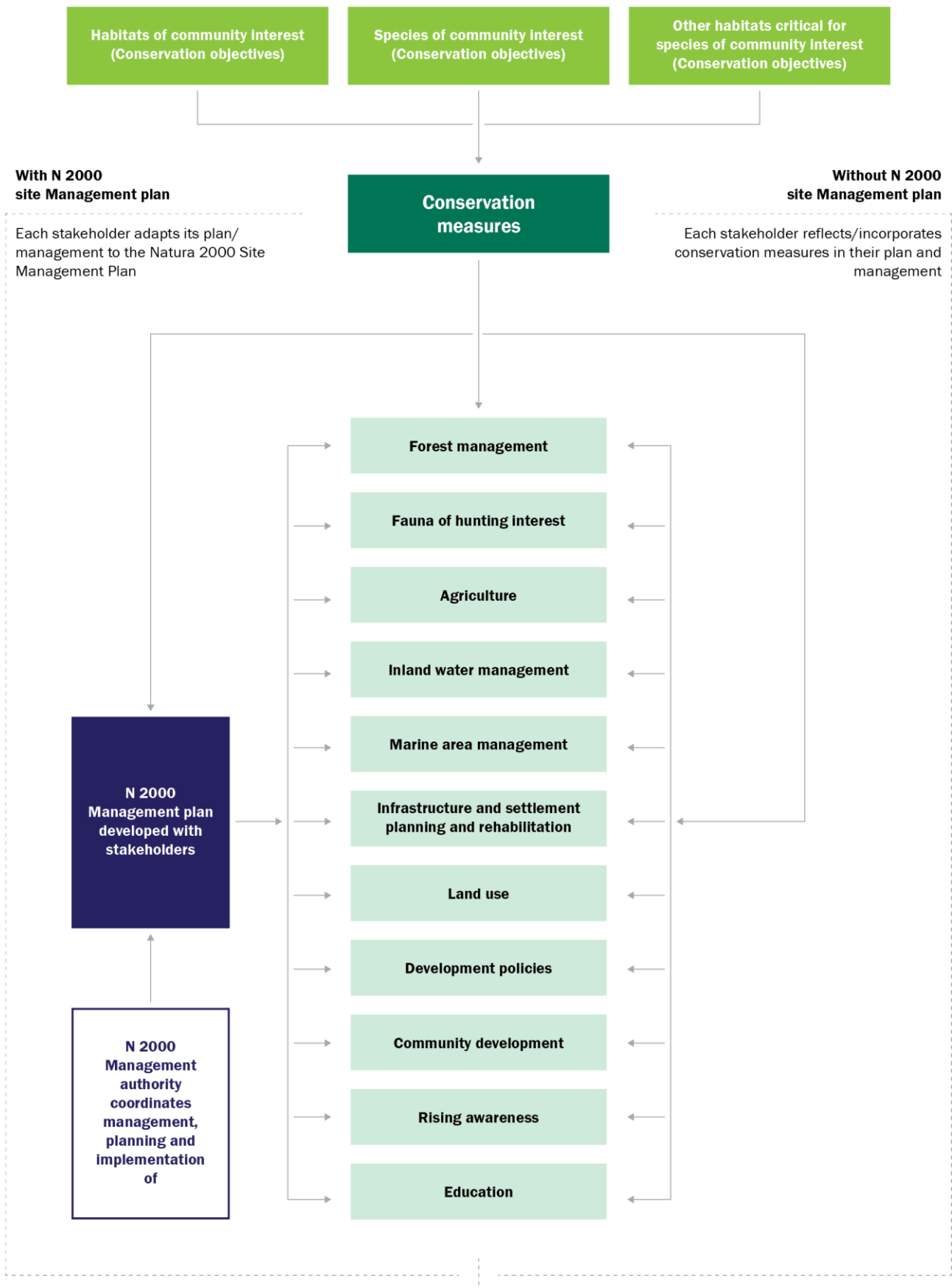
To overcome this challenge a management plan could be developed for the site under the coordination of the responsible authority at the regional or local level. Even if there is no dedicated management team in place, the management plan could be the framework to allow some coordination at the site level.

An analysis on the earlier stages of Natura 2000 management at the EU level is presented in the “Report on the Implementation of the Natura 2000 Network in Europe”<sup>12</sup> and various management approaches are described.

Figure 5. reflects the main differences in the management of Natura 2000 sites in the two approaches outlined in Article 6 of the Habitats Directive.

<sup>12</sup> <https://www.nku.cz/assets/publikace-a-dokumenty/ostatni-publikace/report-implementation-natura-2000-network-in-europe.pdf>

Figure 5. Conservation management approaches in Natura 2000 sites



### 3. THE IMPORTANCE OF MANAGEMENT PLANNING

As presented in Chapter 2.2, management plans are not compulsory for Natura 2000 sites. However, in many cases these sites are characterized by a certain complexity given by the fact that:

- sites are designated usually for several target species and habitats. Therefore, several conservation measures have to be harmonized and implemented to maintain or restore the a good or even excellent conservation status these species and habitats;
- several pressures and threats are deriving usually from human activities. Therefore, surveillance, control and coordination activities have to be performed to reduce the impact of these activities on the species and habitats of community interest.

Furthermore, in many cases these sites might be large, complex areas, with overlapping designations. The management of these areas represent a real challenge, as it requires the harmonization of several conservation objectives and coordination of activities of many stakeholders.

Management plans are a real aid in providing guidance for the management that can respond to these situations and help with the responsible and efficient use of the available resources. These plans are also helping to understand the resource needs on the long term. These are only a few of the “uses” of the management plans.

It is, therefore, **recommended to have management plans developed for Natura 2000** sites, to help a participative and adaptive management of these sites. Having a management plan will help in both situations:

- when a site has a dedicated management team, the management plan becomes the main instrument that guide the management activities of the team and helps the coordination of all stakeholders,
- if a site does not have a dedicated management team and each of the stakeholders with relevant activities have to incorporate the conservation measures in their plans and management approaches, the management plan developed by a responsible authority will be an important guiding document for each of the stakeholders. It can also guide community activities in sup-port of the site and, indeed, education and awareness raising activities that different stake-holders might be interested to conduct is support of the Natura 2000 site.

The management plan for Natura 2000 sites covering small areas and having small numbers of species and habitats of community interests, as well as relatively reduced pressures and threat, can be a document that briefly describes the Natura 2000 site, states its specific purpose and functions, outlines what actions are required to meet those functions and identifies the resources required to complete the actions.

For the more complex, large Natura 2000 sites the management plan should be more substantial: it should function as the guide for the protected area team and for stakeholders to work efficiently and effectively towards the goals.

The process of developing the plan is as important as the plan itself. Considering the fact that in most cases the implementation of management measures in Natura 2000 sites depend on various stake-holders, the planning process has to be a highly participatory one. The management planning process becomes more complex with the numbers of overlapping designations.

The structure and the content of a Natura 2000 management plan can be adapted from those applied to protected areas. Careful consideration has to be given to the main management domain, i.e. the conservation management aspects. However, it should not be ignored that the key management objective cannot be achieved solely through conservation management – see Chapter 2.1.2 Other management domains at site level.

## 4. ROLE OF STAKEHOLDERS IN THE MANAGEMENT OF NATURA 2000 SITES

A stakeholder analysis for the future Natura 2000 network is yet to be carried out for the identification of key stakeholder groups that will have a say in the management of future Natura 2000 sites. For the purpose of these guidelines, the stakeholder groups were identified starting from the management domains that are recommended to be addressed for the management of the sites (see Chapter 2.1.2).

**Table 2. Key stakeholder groups for Natura 2000 managers**

Management themes and domains	Key Stakeholder Groups	Role
<b>I. CONSERVATION MANAGEMENT</b>		
	<b>NATIONAL LEVEL</b> Ministry of Sustainable Tourism and Development (MoSDT)  Agency for Nature and Environment Protection (NAPE)  PE National Parks of Monte-negro  NGO's	Developing Natura 2000 legal framework according to the EU nature directives  Developing national species action plans  Developing legal framework for compensation payments  Environmental Impact Assessment (EIA)  Strategic Environmental Assessment (SEA)  Appropriate assessment for the ecologic network area  Protection and management of biodiversity, natural resources and the existing natural environment, biodiversity conservation, monitoring and mapping  Biodiversity monitoring and conservation
	<b>NATIONAL AND REGIONAL LEVEL</b> Universities Research Institutes NGO's	Inventories, mapping, re-search and monitoring
	<b>LOCAL LEVEL</b> Protected Area Managers of Regional Parks and other protected areas with a lower category of protection  PE National Parks of Montenegro  NGO's	Overall management and stakeholder coordination  Biodiversity monitoring and conservation
<b>• Forest management</b>	<b>NATIONAL LEVEL</b> Ministry of Agriculture and Rural Development  Ministry of Sustainable Tourism and Development  State and private forest managers	Adapting forest legislation according to the requirements of the EU nature directives  Integration of environmental protection objectives into the forest development plans and forest management programmes and managing Natura 2000 areas in forests Developing compensation payment framework

		Forest management impacting habitats and species of community interest
	<p><b>NATIONAL AND REGIONAL LEVEL</b> Protected Area Managers of Regional Parks and other protected areas with a lower category of protection</p> <p>Municipalities</p> <p>Forests areas managers</p>	Overall management and stakeholder coordination
<p>• <b>Management of fauna of hunting interest</b></p>	<p><b>NATIONAL LEVEL</b> Ministry of Agriculture and Rural Development</p> <p>Ministry of Sustainable Tourism and Development</p> <p>Agency for Nature and Environment Protection</p> <p>Hunting Association of Montenegro</p>	<p>Adapting game management legislation to Natura 2000</p> <p>Developing national species action plans</p>
	<p><b>LOCAL LEVEL</b> Game management area managers</p>	Game management area management impacting species of community interest
<p>• <b>Agricultural land management</b></p>	<p>Ministry of Agriculture and Rural Development</p> <p>Farmer Associations</p> <p>Farmers</p>	<p>Adapting agricultural management legislation to Natura 2000</p> <p>Establishment of partnership between Natura 2000 sites managers and rural farmers</p> <p>Management of farmland in Natura 2000</p>
<p>• <b>In-land water management</b></p>	<p>Water Management Authorities</p> <p>National parks and other protected areas</p>	<p>Adapting water management legislation to Natura 2000</p> <p>In-land water management</p>
<p>• <b>Management of marine habitats and species</b></p>	<p>Ministry of Sustainable Tourism and Development</p> <p>Public Enterprise Morsko dobro</p> <p>Municipalities</p> <p>NGO's</p>	<p>Adapting management legislation to Natura 2000</p> <p>Inventories, mapping, research and monitoring</p> <p>Biodiversity monitoring and conservation</p> <p>Marine habitats and species management affecting habitats of community interest</p>
<p><b>II. SUSTAINABLE DEVELOPMENT</b></p>		
	<p>Ministry of Sustainable Tourism and Development</p> <p>Ministry of Agriculture and Rural Development</p> <p>Protected Area managers (community outreach role and visitor management role)</p>	<p>Overall management and stakeholder coordination</p> <p>Establishment of partnership between Natura 2000 sites managers and tourism related stakeholders</p>

	Tourism related stakeholders (sustainable development component) – National Tourism Organisation of Montenegro, Municipalities, Local Authorities, Local Tourism Organisations	
<ul style="list-style-type: none"> <li>• <b>Territorial planning (land-use planning)</b></li> </ul>	<p>Ministry of Sustainable Tourism and Development</p> <p>Agency for Nature and Environment Protection</p> <p>PE National Parks of Montenegro Municipalities</p>	<p>Development of spatial purpose spatial plans</p> <p>Overall management and stakeholder coordination</p>
<ul style="list-style-type: none"> <li>• <b>Development policies</b></li> </ul>	<p>Ministries (Ministry of Agriculture and Rural Development and Ministry of Sustainable Tourism and Development),</p> <p>National Tourism Organisation of Montenegro</p> <p>Municipalities</p> <p>Local Authorities</p> <p>Local Tourism Organisations</p>	<p>Overall management and stakeholder coordination</p>
<ul style="list-style-type: none"> <li>• <b>Community development and outreach</b></li> </ul>	<p>Ministry of Agriculture and Rural Development</p> <p>Ministry of Sustainable Tourism and Development Local authorities</p> <p>National Parks and other protected area management teams</p>	<p>Overall management and stakeholder coordination</p>
<b>III. AWARENESS RAISING AND EDUCATION</b>		
<ul style="list-style-type: none"> <li>• <b>Awareness raising</b></li> </ul>	<p>PA Managers</p> <p>Ministry of Sustainable Tourism and Development</p> <p>PE National Parks of Monte-negro</p>	<p>Awareness raising in local communities, citizens, schools etc.</p>
<ul style="list-style-type: none"> <li>• <b>Education programmes</b></li> </ul>	<p>Ministry of Sustainable Tourism and Development</p> <p>Ministry of Education</p> <p>Academia</p> <p>PE National Parks of Montenegro</p> <p>Non-governmental organisations</p>	<p>Education in the area of management and marketing</p> <p>Setting up curriculums for nature conservation and PA management</p> <p>Education in local communities, citizens, schools etc.</p>

## 4.1 STAKEHOLDER INVOLVEMENT IN THE PLANNING AND MANAGEMENT PROCESS

Stakeholders have a critical role in the management of Natura 2000 sites. The framework for stakeholder participation in the planning and management process for Natura 2000 sites should be defined through the legislation. If a participatory governance<sup>13</sup> system is promoted, stakeholders will have the opportunity to participate and contribute, even to have an important say in the management decisions of the Natura 2000 sites. The management set-up should encourage/allow stakeholders to participate in platforms/groups that contribute to the planning process. Mechanisms should be put in place to help stakeholders to understand what is Natura 2000 management about and to take informed decisions when adapting their activities to the objectives of the sites.

For defining the role of stakeholders in the management of a Natura 2000 site, it is recommended to consider the management domains that should be covered for most sites. The table below summarizes the main management domains by each of the three themes defined by the EU Directives (see Chapter 2.1.2) and shows their importance.

**Table 3. Importance of Natura 2000 management domains**

Management Themes according to the EU nature Directives		
CONSERVATION	SUSTAINABLE DEVELOPMENT	AWARENESS
1. Species and Habitat Management		
2. Natural Resource Management		
	3. Community Outreach (support for sustainable development and awareness raising)	
4a. Influence Development Policies (reflect Natura 2000 objectives in local, regional and national plans and strategies)		
4b. Territorial planning (reflect Natura 2000 objectives),		
4c. Infrastructure development (prevent negative impact)		
5. Tourism development (promoting ecotourism and visitor management to support conservation, sustainable development and contribute to awareness raising and education)		
		6. Education
		7. Awareness raising
7. Overall site management (participatory management planning, establishing and coordinating stakeholder platforms for participatory management, monitoring management effectiveness and efficiency)		
8. Resource management (human, financial, equipment) for the management of Natura 2000 sites		
Management domains (colour codes)	<span style="color: red;">■</span>	<b>Critical</b>
	<span style="color: green;">■</span>	<b>To be considered if relevant</b>

<sup>13</sup> Governance refers to the decision making system, i.e. in this case to the decision making arrangements for Natura 2000 site management. A participatory governance system allows for stakeholder participation in the decision making process.

These management domains have to be covered either by a specially designated management entity or by various stakeholders, depending on the management approach (see Chapter 2.2). But even if the site has a management team, stakeholders can and will have various levels of involvement in each of these domains.

The management domains highlighted in light red are critical for almost any Natura 2000 site. Those highlighted in green are important only if relevant for each specific site. Critical management domains have to be covered if it is expected to have an effective Natura 2000 network. There might be cases when not all these management domains are needed, like, for example, for sites that are designated for habitats and species that do not need any active management and are not affected by any natural resource management activity or other.

Considering the above matrix (Table 3) from the perspective of the management approaches de-scribed in Chapter 2.2, it is important to understand that there might be significant differences in these two approaches:

- if sites have **specifically designed management plans, all management domains will be considered**, i.e. both the critical ones and the ones that are relevant. If there is a management team in place, the Overall site management will also be covered. In this situation, stakeholders have to adapt their plans and management approaches to the provisions of the Natura 2000 Site Management Plan. Stakeholders will be also supported by the management authority to contribute to the overall management of the site, by developing, for example, specific education or awareness raising programmes.
- for the sites for which there is **no management plan, only conservation measures integrated into other development plans**, even some of the critical management domains might not be properly considered. In these situations, stakeholders will have to receive clear instructions from the responsible authorities on the conservation measures that they have to reflect/integrate in their planning and management. However, some of the management domains will not be covered. Overall coordination and harmonization of conservation activities might be difficult in the absence of a management plan and dedicated management capacity.

In both cases, stakeholders involved in natural resource management and/or development policies have to consider the conservation measures established for individual Natura 2000 sites or in national action plans and have to adapt their management plans and their management practices, to reflect and integrate these measures. In Chapter 1.2 there are some examples on how some of the sectoral management measures might need to be adapted to contribute to the conservation objectives of the site.

Stakeholders' role in Natura 2000 site management can be considered in various ways, with different responsibilities:

- a) Managers of a Natura 2000 site
- b) Participants in the planning process
- c) Implementation entities for the conservation measures in the various sectors
- d) Partners of the management team in the implementation of the management activities
- e) Participants in the evaluation process determining the effectiveness and efficiency of the Natura 2000 site management

Critical assumptions and key responsibilities for each of the situations is presented in Table 4.

**Table 4. Critical assumptions for stakeholder engagement and key tasks**

Role	Critical assumptions	Key tasks/responsibilities
a) Managers of a Natura 2000 site	<ul style="list-style-type: none"> <li>• There is technical competence and capacity to carry out the tasks</li> <li>• Resources (human and financial) are available (own resources or funding opportunities)</li> <li>• State support with at least some resources</li> </ul>	<ul style="list-style-type: none"> <li>• Covering all management domains, with a focus on the critical ones (see Table 3)</li> </ul>



<p>b) Participants in the planning process</p>	<ul style="list-style-type: none"> <li>• Legal requirement for participatory process in place</li> <li>• Functional mechanisms in place at the site level to involve stakeholders, including the right attitude and capacity of the management team</li> <li>• Stakeholders have the necessary knowledge and capacity, as well as the willingness to participate</li> </ul>	<ul style="list-style-type: none"> <li>• Present and advocate for the sectoral interests to be considered in the management of the site</li> <li>• Advocate for the interests of various stakeholder groups to be reflected in the zonation and the management plan</li> <li>• Adapt the site management plan provisions to the sectoral plans and approaches</li> </ul>
<p>c) Implementation entities for the conservation measures in the various sectors</p>	<ul style="list-style-type: none"> <li>• Contractual agreements clearly reflecting the management actions needed for contributing to the conservation measures</li> <li>• Clear indicators defined to measure the success and the impact of the management measures implemented by the stakeholders</li> <li>• Functional compensation payment schemes or other incentives in place to compensate stakeholders for their economic losses</li> </ul>	<ul style="list-style-type: none"> <li>• Adapt management practices to the conservation measures</li> </ul>
<p>d) Partners of the management team in the implementation of the management activities</p>	<ul style="list-style-type: none"> <li>• Partnership agreements with well defined objectives, responsibilities and indicators</li> <li>• Joint efforts of the stakeholder and the management team to identify and allocate the financial resources needed for the activity (joint projects)</li> <li>• Well designed and functional evaluation/monitoring system, which helps improvement of the collaboration</li> </ul>	<ul style="list-style-type: none"> <li>• Specific to each project implemented in partnership</li> </ul>
<p>e) Participants in the evaluation process determining the effectiveness and efficiency of the Natura 2000 site management</p>	<ul style="list-style-type: none"> <li>• Legal framework allows/encourages involvement of key stakeholders in the evaluation process</li> <li>• Management team is accountable to stakeholders and has to present results</li> <li>• Principles of transparency are implemented at the site level</li> <li>• Stakeholders have the necessary competences to understand the evaluation process and criteria and are objective evaluators</li> </ul>	<ul style="list-style-type: none"> <li>• Participates in periodical evaluation processes, as defined in the management plan, internal regulations or in the legislation.</li> </ul>

Depending on the roles established for the stakeholders, the governance type of the Natura 2000 system will be established and levels of stakeholder participation/engagement agreed. Guidance on governance type<sup>14</sup> developed by IUCN for protected areas might be helpful when deciding the levels of participation in site management.

<sup>14</sup> Borrini-Feyerabend, G., N. Dudley, T. Jaeger, B. Lassen, N. Pathak Broome, A. Phillips and T. Sandwith (2013). Governance of Protected Areas: From understanding to action. Best Practice Protected Area Guidelines Series No. 20, Gland, Switzerland: IUCN. xvi + 124pp.

## 4.2 SECURING EFFECTIVE STAKEHOLDER INVOLVEMENT

Stakeholder involvement in the management planning process is of critical importance. Diverse land-ownership and land-use rights, as well as clearly defined natural resource management responsibilities build a context in which the management of Natura 2000 sites can not be done effectively and efficiently without the active involvement of stakeholders. Therefore, a good coordination of the stakeholder involvement process is key to successful planning and management of Natura 2000 sites

A stakeholder involvement plan should be developed at least from the preparatory phase of the planning process and continuously updated to allow for an active and efficient cooperation. The following activities might have to be implemented by the management team:

- organizing workshops for key stakeholders, like for e.g. at the beginning of the planning process, to learn about the needs and concerns and towards the end of the planning process to present and discuss the final draft of the Management Plan or activities/projects during implementation
- inviting stakeholders to delegate experts to the various working groups that are developing action plans for the management programmes or projects,
- organizing consultation meetings for stakeholders on various decisions and projects, where the management team and experts discuss issues of special interests for the stakeholders.

One example where the agreement of stakeholders is critical is the management zonation. It is very important to analyse and agree the zonation during the management planning process.

As the success of the planning process depends largely on the involvement of stakeholders and, ultimately, on their acceptance for the management plan, it is critical that the members of the planning team develop very good communication skills and are all very open for working with stakeholders, even if some of these stakeholders have, at least apparently, conflicting interests.

Each consultation stage/activity needs to be well documented, with minutes or agreements signed by the participants to avoid misunderstandings and prevent conflicts.

Written agreements should be obtained from all key stakeholders for any joint decision/activity.

Based on the management plan and using the monitoring indicators established during the planning process, **annual work plans** will be developed by the site management team. The management team should set up and use a simple, but comprehensive system for documenting management activities, for evaluating effectiveness, for reporting and, if necessary, for adapting the management plan. The role of stakeholders should be defined for each of these management activities.

## 5. MANAGEMENT OF NATURA 2000 SITES OVERLAPPING WITH PROTECTED AREAS OF NATIONAL INTEREST

In most countries protected areas of national interest are designated also as Natura 2000 sites and/or are overlapping with larger Natura 2000 sites. There might be also situations when only part of a national protected area becomes a Natura 2000 site.

For these situations, the management objectives of the national protected areas will have to be adapted to properly reflect the key management objective of the Natura 2000 site(s).

Achieving the Natura 2000 management objectives is mainly about preventing/reducing pressures and threats deriving from human activities and/or about restoration activities, just as for achieving the management objectives of a national park or other category of protected areas.

For areas with overlapping designations it is very important to conduct planning processes that look carefully into the correlations between all the target species and habitats and the requirements for protecting other values as well. In these cases the zonation has to be revised and/or the responsible authority and the stakeholders have to be aware that the most restrictive rules apply, regardless if those are deriving from the national legislation or the EU Directives.

If the Case Study Site is overlapping with a National Park, as presented on Figure 6, the following aspects should be considered in the management:

1. **The management plan of the National Park** has to be adapted to **integrate the management objectives of the Natura 2000 site**. Ideally a new, integrated management plan should be developed. It should consider the entire surface of the Natura 2000 sites, not only the overlapping area. The following situations might arise:
  - a) the entire area of the Natura 2000 site will be considered in the management plan – this should be the situation if the National Park management team will receive the responsibility to manage the Natura 2000 site,
  - b) only the overlapping areas will be considered for the new management plan. In this case, it is recommended that the management plan for the Natura 2000 site is developed first and the management measures of the National Park are adapted to the requirement of the Natura 2000 site. This should happen if the decision is to give the responsibility for the Natura 2000 site outside the National Park to another entity (especially if the area outside the Park is a large one). The Natura 2000 management plan will be developed by the joint management teams of the National Park and of the Natura 2000 site.
2. The **zonation of the National Park** does not have to be changed, unless it helps the objectives of the Natura 2000 site. For example, in the Case Study area, the wetland habitat is already included in the Core Zone. No other Natura 2000 habitats or species require non-intervention management, therefore there is no need to extend the Core Zone.  
The EC does not exclude the possibility of maintaining wilderness areas, i.e. areas with no or very low human intervention in a Natura 2000 site<sup>15</sup>.
3. The **most restrictive management measures** are the ones that will be considered for the management of the overlapping areas. The non-intervention rule from the Core Zone will apply also to the forest habitat of community interest. This might seem, at a first glance, as a real issue for the Natura 2000 management objectives if, for example, a windstorm affects the habitat and trees will fall on a significant area. Some might claim that the Habitat Directive requires maintenance or restoration of the good/excellent conservation status of the habitat and ask for an urgent restoration process through harvesting and planting. Such an approach contradicts the strict protection requirement of the National

<sup>15</sup> See *Guidelines on Wilderness in Natura 2000 - Management of terrestrial wilderness and wild areas within the Natura 2000 Network, European Union 2013* (main references to non-intervention core-zones Page 45).

Park for this zone. In such cases, the strict protection will still allow for the natural restoration of the forest habitat, which will take decades. This is an acceptable approach for the Natura 2000 site.

Figure 6. Overlapping designations



## 6. PREPARING FOR MANAGEMENT – RECOMMENDATIONS

Although to some might seem much too early to worry about the management of Natura 2000 sites that are not even designated yet, there are several measures that should be considered if the country aims to have an effective and efficient Natura 2000 management. Thus, the Natura 2000 network will not only contribute to the sustainable development of the country in a short time, will also reduce significantly potential conflicts with key stakeholders.

The main recommendations deriving from these guidelines are presented below.

- A. Decide in the early stages **if your Natura 2000 sites will be considered protected areas**<sup>16</sup>. If the decision will be to have them integrated in the protected area network, adapt the protected area legislation accordingly.
- B. **Establish clear management responsibilities for each Natura 2000 sites and reflect them in the legislation.**

With regards to who is/are implementing the management measures, there are three possible approaches:

- a) A dedicated management team for each or several Natura 2000 sites is established and has the overall responsibility for the management of the site. When sites are overlapping with protected areas of national interest, the existing management team can have also the management rights for the Natura 2000 site. Careful consideration should be given to how the areas are overlapping: if the Natura 2000 site has a significant area outside the protected area, additional management resources should be allocated to the team.
  - b) Resource managers/administrators and/or landowners have the responsibility to implement conservation management measures, based on the management plan, under the coordination of an entity that is responsible for the Natura 2000 site, but it also covers other responsibilities. In these situations, the participatory management planning process is key for the success of the site management.
  - c) Resource managers/administrators and/or landowners have the responsibility to implement conservation management measures based on a contract, signed with the authority responsible for the Natura 2000 site (contractual agreement).
- C. Even if developing management plans is not compulsory, carefully consider a framework for planning conservation management in Natura 2000 sites. Actions of land-users and resource managers have to be coordinated, education and awareness raising activities have to be harmonized and community development should be encouraged based on the responsible use of natural resources in most Natura 2000 sites. This complex approach needs some **strategic, participatory planning**.
  - D. Even if the decision is that Natura 2000 sites are not part of the national protected area network, be aware of the fact that **most of the protected area management approaches/tools are applicable to the Natura 2000 sites**. Besides the conservation management domain, there are various other domains that can help achieve the key management objectives of a Natura 2000 site (see Chapter 2.1.2). Build on the knowledge and experience accumulated in general nature conservation activities and in protected area management.
  - E. Clarify **management arrangements** for Natura 2000 sites that are **overlapping with other protected areas**.
  - F. **Invest in capacity building** for future Natura 2000 staff and for stakeholders directly involved in the management of Natura 2000 sites. Do this in a strategic manner: identify, through structured training needs assessment what are the competence needs and develop well designed, comprehensive learning programmes for key target groups. Prioritize the competences that have to be developed depending on what are the management priorities. For example, training programmes on ecology, with the aim to develop competences related to inventories, mapping and establishing functional monitoring systems for the target species and habitat types might be a priority for the designation phase and conservation management competences should be developed already for the early stages of management.
  - G. Plan from the early stages of designation for **compensation payment and other support programmes** for stakeholders that will be affected by Natura 2000 management measures. The overall economic and social

<sup>16</sup> See the internationally accepted definition of protected areas: Guidelines for Applying Protected Area Management Categories, IUCN. xxpp.

benefits of the Natura 2000 network will become obvious in time, but the restrictions affecting landowners have to be compensated.

- H. Invest in **education and awareness raising programmes** not only at the site level, but also at the regional and national level.



## Annex

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