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# Regional Forestry Charter: a tool for governance

## *The example of the Luberon Regional Nature Park (France)*

by Gilles MARTINEZ

***Today among the different countries around the Mediterranean Rim, there are numerous issues in common in relation to forestry management in protected areas: the growing importance of the regions, the development of participative methodology, taking into account the multifunctional role of forests... The Qualigouv project has facilitated the pooling of different experiences, including that of the Regional Forestry Charter of the Luberon Nature Park in France. The method for driving the project forward made a large contribution to its success, in particular the idea of confronting the perspectives of “peer groups” with those of the participants directly involved in the project.***

### Context

The Med QUALIGOUV project entitled “Improve the governance and the quality of forestry management in protected areas around the Mediterranean” grew out of an awareness of and reflection about the large number of areas delimited for protection which involved Mediterranean woodlands and the observation that, beyond the disparities related to national context (legal, ecological, of land ownership, organisations...) or levels of protection, there was convergence around the overall tendencies:

- The increasing importance of local and regional areas in establishing forestry policy;
- The development of participatory methods in the structuring and implementation of forestry projects;
- The taking into account by forestry action plans of a forest’s multifunctional nature.

QUALIGOUV brought together eight partners from three countries: Spain (the Murcia Region and the Generalitat Valenciana), Italy (the Province of Taranto and the WWF) and France (AIFM -the International Association for Mediterranean Forests, the Alpilles Regional Nature Park, Luberon Regional Nature Park and the ONF – French national forestry commission).

QUALIGOUV’s method was based on establishing a network between the regional partners in the project and, hence, functioned at two levels:

- participative governance for the carrying out of the collaborative programme on the theme of governance;

– a pilot action at each of the partner sites, whose purpose was to provide a location for experimentation of the knowledge and knowhow resulting from shared exchange during the cooperative efforts-up.

One added value of the method was the possibility of continuous back-up and a common method for evaluating results, thanks to the dynamic ensured by AIFM.

## The project of the French partner “Luberon Regional Nature Park”

The Luberon Regional Nature Park (PNRL) is a *syndicat mixte*, a combination of 77 municipalities with the Departmental Government Councils of the Vaucluse and Alpes-de-Haute-Provence *départements* along with the Provence-Alpes-Côte d’Azur Regional Government Council. It covers some 175,000 hectares of which nearly 60% are woodlands and natural areas. Its management is governed by a charter. Governance is in the hands of an syndicate council made up of representatives of the member authorities.

The objectives and role of a regional nature park are defined by France’s Rural Code, as follows:

- to protect and make profitable use of its natural resources and natural and cultural heritage;
- to contribute to land use and improvement and to reinforce the area’s identity;
- to participate in the economic and social development and enhancement of the quality of life;
- to facilitate the reception and education of the general public and provide it with information;
- to carry out experimental action which may also serve as models in the fields mentioned above

The PNRL’s candidacy for inclusion in the QUALIGOUV project was entitled “The Regional Forestry Charter, a tool for governance seen as a method for establishing long-term equilibrium between the management of forest and woodland ecosystems and a regional strategy for the profitable use of the wood resource”.

Its first aim was submit the tool “regional forestry charter” (RFC) to collective analysis

as the reference for governance of the forestry policy within the park boundaries.

The RFC, arising from a very wide concertation including all the categories of stakeholder involved in natural areas (in the broad sense of the phrase), orientates the activities of the Luberon Park and its partners towards sustainable forestry management. The charter is thus a strategic framework at the same time as being a method of governance. It is led by a steering committee whose discussions are chaired by a designated elected representative, president of the park’s Natural Areas Commission.

Thus, integrated into the PNRL’s action in relation to forestry can be found the principles of participative governance and continuous assessment which lie at the heart of the QUALIGOUV project.

At the operational level, the project consisted of implementing the orientations of the RFC on a pilot site along two axes:

- setting up a coherent scheme for sustainable management encompassing the whole park, basing the work on participative collaboration;
- “plugging in” this scheme to the supply lines in the region-wide sectors making profitable use of the wood resource on local short commercial circuits.

The landholding pattern in the Luberon is mainly private. Otherwise, public forests benefit from the Forestry *Régime* and enjoy the guarantees of management. In contrast, the innumerable small or scattered private holdings do not benefit from any technical back-up nor from a regulatory framework of certified sustainable management.

Given this context of landholding patterns, the Luberon Park mandated the regional organisation of private forest landowners, the CRPF, in the Provence-Alpes-Côte d’Azur Region (PACA) to lead the implementation of the Regional Forestry Charter as well as its Qualigouv project.

### **Starting up the project**

In operational terms, the PNRL’s QUALIGOUV project was developed along two main lines:

- first, the overall leadership work involved in the RFC which was to serve as the common methodological framework for adoption by the collaborating partners in QUALIGOUV;

– second, the carrying out of the QUALIGOUV programme in accordance with the terms of the candidate application document, i.e. taking part in the cooperative exchanges and setting up the pilot site.

The governance of the PNRL's QUALIGOUV project was ensured by the steering committee of the RFC which met three times during the life of the programme. Its role was to validate the state of progress and orientate activity at the local level.

In addition, a Technical Committee was created, made up of elected representatives, Park delegates and representatives of social and professional bodies. It was in charge of overseeing the technical aspects of operations with the aim of facilitating their success. In particular, it was very involved in choosing the location of the pilot site which was later validated by the Steering Committee.

The first meeting of the technical committee (October 2009) succeeded in defining a method of working. Given the objectives of QUALIGOUV, it was suggested that a trial effort be undertaken to set up a group of landowners whose scope would be the whole forested area and which would be in charge of driving the design and implementation of a project for concerted management formalized in an integrated management plan.

Discussion revolved around the coherence of the project and the necessary method:

- formalized governance;
- the taking into account of all the challenges and issues inherent in a massif-wide approach;
- the establishment of a management plan integrating the responses to the assorted challenges and issues.

The choice of the pilot site was a critical stage in the feasibility and success of the project.

Working with a geographical information system resulted in the selection of four different sites. This process consisted in crossing a “challenges and issues” level, built up from tools applied in planning and development for natural areas (statements of objectives for Natura 2000 sites, fire protection and fighting plans for whole massifs (DFCI<sup>1</sup>), Agenda 21, sites covered by landscape preservation regulations...), with a “sector” level resulting from the beneficial pooling of the various work done on the profitable use of the wood resource: for the energy sector,



the Regional supply plan and *Réseau énergie bois en Luberon* (REBEL: wood for energy network); for quality saw wood and timber: the “Bioressources” centre for rural excellence (with experience in the profitable use of cedar); and a level termed “Urmatt”, formed by the CRPF following incentives by the central government to develop the use of wood.

The RFC steering committee chose the “Massif des Ogres” site (stage 1 of the project). Their decision was based on the diversity and complexity of the challenges and issues at this location:

- Classified site (protected landscape) by virtue of the Natural Monuments and Sites Act of 1930;
- “Grand Site” initiative under way to obtain certification as a *Grand Site de France*;
- Natura 2000 site for the preservation of biodiversity;
- Massif-wide anti-wildfire plan (*Plan de massif DFCI*);
- Woodlands and forest in the village of Roussillon classified under the Urbanisation Code.

Also integrated into the choice is the recognition of the predominance throughout the massif of private forest holdings and pines. Indeed, the profitable use of pines remains a problem. The saw wood sector is based on the presence of two sawmills in the *Vaucluse département* and almost the only outlet is the pulp and paper plant at Tarascon (Fibre Excellence).

**Picture 1:**

The “Massif des Ogres” site.

Author GM/CRPF PACA

1 - DFCI : *Défense des forêts contre l'incendie* - Protecting forests against fire.

However, the intensification of management implies the implementation of viable economic models to finance it. Thus, the Luberon Park is committed to a policy promoting the development of wood for energy which should develop more outlets.

The Massif des Ocre site covers an area of 910 hectares in the municipalities of Roussillon and Goult in the Vaucluse.

### Into the field

In order to acquire a framework within which to energise concertation, the steering committee validated the idea of beginning with an audit of the natural environment (stage 2) and a sociological study (stage 3) to determine the expectations of the stakeholders in the area.

### Synthesis of the environmental audit

The pilot site is formed of sandy soils which were quarried intensively for ocre pigments up to the 1950s. The forest here is recent, resulting from phenomena of biological resurgence following on the decline in quarrying. The two main tree species are pioneer: Aleppo pine (Goult) relaying the maritime pine (Roussillon) on acid soils. This first generation of conifers prepared the way for a level of leafy undergrowth in which the evergreen holm oak of the dry areas gives way in damper conditions to the downy oak mixed with sweet chestnut.

The failure to make profitable use of the wood resource is due to the constraints of strict regulations, the changes in ownership, with a high proportion of holiday homes, and

the operational difficulties of its exploitation (terrain often very steep).

The special feature of this forest is that it now plays a crucial role in the landscape which has become the basis of a major tourism economy. On this account it is highly frequented, criss-crossed by numerous hiking paths which, together with the scattered pattern of housing throughout the massif, increase the threat of wildfire. Consequently, a large number of fire hydrants have been installed and, thus, access is possible to almost everywhere in the forested area.

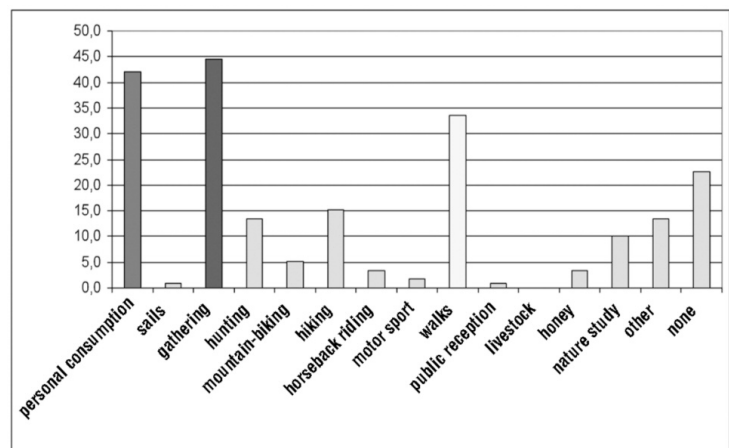
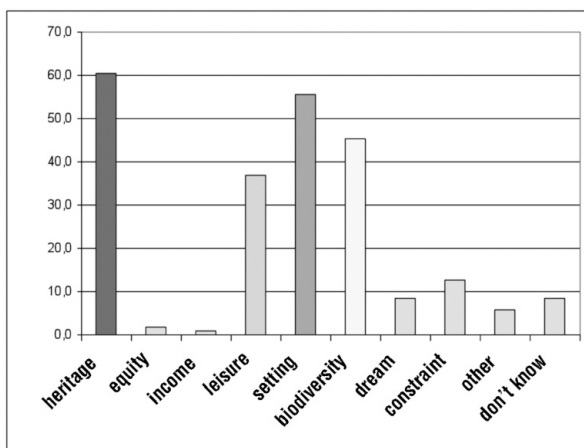
The Natura 2000 site, backing up a zoning survey carried out by the Luberon Park of the areas of “major biological value”, has highlighted thirteen habitats of European interest of which five are forested environments: corridors of *Salix alba* and *Populus alba*, shrubby matorral with *Juniperus* with trees emerging, forests of *Castanea*, others of *Quercus ilex* and *Quercus rotundifolia* and, lastly, forests of endemic Mediterranean pine (maritime pine). Also, three amphibious species (*Bufo calamita*, *Hyla meridionalis* and *Pelobates cultripipes*) and six species of chiropter (*Rhinolophus ferrumequinum*, *Rhinolophus hipposideros*, *Myotis emarginatus*, *Miniopterus schreibersii*, *Myotis blythii*, *Barbastella barbastellus*) benefit from preservation measures.

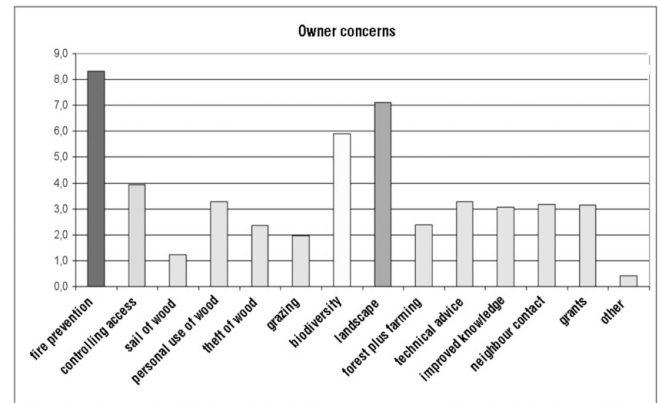
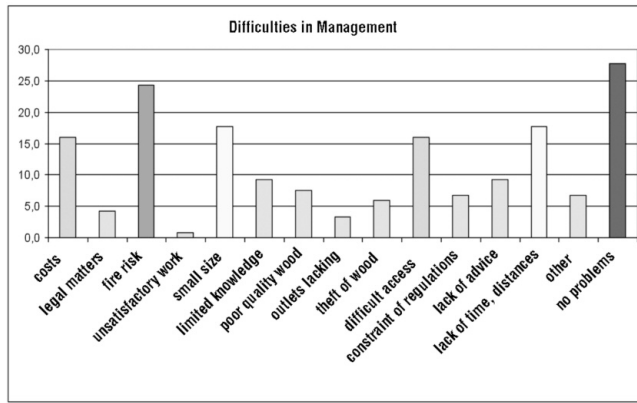
Lastly, some old plots of standards and isolated large woods, all becoming senile, are of interest for the emergence of a mesh or network of old wood.

In spring and autumn there are heavy rains which bring the risk of major erosion of the ocre cliffs. The woodland cover plays a vital role in stabilising these exceptionally fragile soils.

**Figure 1 (left) :**  
How the owners see the forests.

**Figure 2 (right) :**  
What owners do in their forest.





### Synthesis of the audit of the human context

A survey of landholdings was carried out to identify forest ownership. The site is detailed in 886 land registry sections encompassing 727 owners (individuals and organisations) of 1,633 plots. The average area of the registered plots is 0.56 hectares while that of the average individual holding is 1.25 ha. The site is thus characterised by a highly scattered pattern of holdings which is representative of the major challenge confronting privately-owned forests in France.

A directory was drawn up in order to facilitate contacting the owners. Nearly 90% of the targeted owners could be contacted thanks to the updating of the land registries with the help of municipal council offices.

A questionnaire was devised and circulated among three categories of stakeholder on the site: property owners, elected representatives and “others” (technical personnel, users...). The number of returned questionnaires was particularly high, 28%, confirming the main result which was the strong attachment to the forests on the site as a part of its heritage (cf. Fig.1).

The main activity is not for gain but is essentially harvesting or gathering for personal consumption (cf. Fig.2). Moreover, 47% of owners declared they do not carry out any management activity on account of various difficulties (cf. Fig.3).

An important item of information to emerge was the strong desire of owners to preserve the forest heritage via a collective framework for action: 50% of them said they were interested in working on certain themes in association with other owners (cf. Fig. 4).

A further important point was the determination of the owners to develop silvicultural

intervention, particularly as a means of reducing the risk of wildfire or, indeed, to meet the legal requirement of clearing inflammable undergrowth as part of the protection measures against fire (cf. Fig. 5).

A sociological synthesis made possible the profiling of the stakeholders on the site by intersecting two variables that constitute key aspects of the project’s future: individual motivations and the desire for collective action.

### Setting up an ASL (voluntary profession-based union)

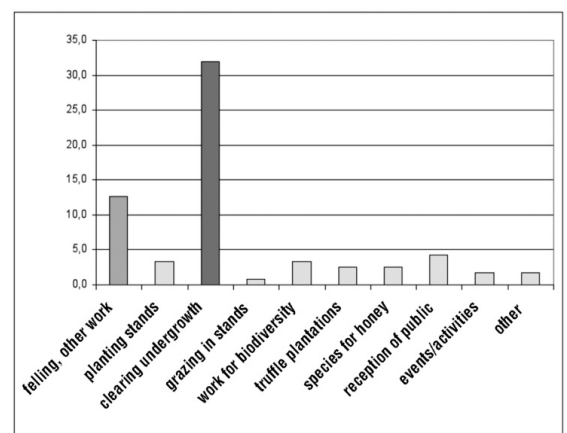
On the basis of the conclusions of the sociological survey, stage 4 consisted of establishing a concertation process leading to a structure for governance (stage 5) capable of putting together a forestry management project for the whole massif. To this end, two working groups were formed: one to reflect on the orientation of the management (the result), the other to consider the type of governance (means). Meeting together twice in October 2010, the working groups discussed the conclusions of the audits. These meeting permitted the collective validation of the framework for reflection and taking a decision to set up an association capable of federating local stakeholders in a shared project.

There were various legal forms possible for this entity; the one chosen was an ASL-GF, *association syndicale libre de*

Figure 3 (left): Management problems confronting owners.

Figure 4 (right): Owners’ interest in different fields.

Figure 5: Owners’ forestry projects.



*gestion forestière* or voluntary interest-based union. In fact, this form of association was seen as a voluntary “club” of forest landowners capable of assuming their responsibilities vis-à-vis others (local authorities, users...). It makes owners the priority while nevertheless engaging them in a process of concertation. Specifically, the president and executive board of the ASL-GF took a leading part in discussions in the technical exchanges and in developing personal relations within the association.

The ASL-GF “Massif des Ogres” was officially set up on January 26, 2011. 95 owners attended on a voluntary basis; they represented a total plot area of 398 hectares, roughly half of the initial targeted amount.

Stage 6 consisted of designing a management plan for the area represented by the ASL-GF. In accordance with the French forestry code, this plan took the legal and technical form of a *Plan simple de gestion concerté*, a simplified but collaborative management plan, or PSG. It is a response to local challenges and issues and the guarantee of the sustainable management of the area represented by the ASL-GF.

Following the Qualigouv method, the concerted PSG was developed from the bottom up. It provides a framework able to orientate the action undertaken by members who commit themselves to a 10-year “road plan”. In parallel, the management plan maintains as a background context the challenges and issues confronting the area as these have been presented by the organisations charged with defining them:

– DREAL PACA: Regional Council’s agricultural and environmental service;

– PNR du Luberon, as the leading entity in activities on the Natura 2000 site;

– SMDVF: semi-public body involved in fire prevention, for technical matters in this field;

– CRPF PACA: forest owners’ organisation, for the characterisation of the issues involved in improving forestry methodology and methods;

– The municipalities of Goult and Roussillon, for integration of local policies on land use and development.

The drafting of this PSG benefited from the numerous exchanges resulting from the cooperation achieved through the Qualigouv programme, as well as from financial help from the PACA Regional Government Council which enabled the ASL GF to obtain technical assistance in writing the finalised plan.

The specific features of the regulations governing a PSG derive from the zoning for environmental protection on which the PSG is based; here the Ogres classified site and the Natura 2000 site. By this token, the owners have requested the implementation of Articles L. 122-7 and 8 (ex L.11) of the Forestry Code which provide for the simplification of procedure by waiving for the entire period of validity of the PSG the preliminary administrative authorisation required for any work, clearing and felling scheduled by it. This is a blanket request with application over the whole area of the PSG, reflecting in this way the overall unifying nature of the method used in its design.

To obtain this authorisation, the owners have asked the bodies involved –DREAL PACA and CRPF PACA- to co-certify the PSG by way of a guarantee of sustainable management. Administrative decisions concerning the document are currently pending.

The drafting of the PSG, the simplified management plan, integrated the challenges and issues involved in the conservation of biodiversity as made explicit in the statement of objectives of the Natura 2000 site.

Taking into account the challenges and issues involved in the landscape were the object of detailed work carried out in the light of the conclusions of the study for the *Grand Site du Massif des Ogres* operation. This three-stage study included an audit which identified forest management as a focus for work related to the preservation of the ocre cliffs landscape.

**Picture 2:**

Exchanging at the workshop (*Maison du Parc* at Apt), between QUALIGOUV partners.  
Author GM/CRPF PACA.



The analysis of the landscape encompassed the entire area involved in the PSG. It assumed the definition of a method for taking into account the role of forest and woodlands in the particular landscape of the Ocre de Roussillon as well as the analysis of the dynamics in the landscape deriving from dynamics at the ecological level: re-occurrence of biological life and the progressive covering over of the landscape, succession of species etc. Such analyses led to proposals for intervention conceived as responses to the challenges and issues on the site. The coherence of these “landscape” proposals was then assessed in relation to the various management objectives and the expectations of local stakeholders, all the while bearing in mind the requirement of balancing the budget for any interventions.

However, it seems that some interventions in fragile stands with special significance in the landscape may involve extra costs that will engender a deficit for the owners concerned. The landscape, from the moment it is identified as a collective public issue (by virtue of its being classified), becomes a public amenity with numerous positive ancillary implications (notably as a tourist attraction). At this level, the forests, as a vital part of this outstanding landscape, provide a service that should be duly paid for, notably by contributing to the costs of management. Reflection is under way whose aim is to establish a partnership between the owners’ association and those involved in landscape conservation.

The stages in the drafting of the PSG were as follows:

- overall characterisation of the site’s landscape, establishing a typology of fragility covering the various sectors making up the landscape;
- updating of the “on the land” data from a 2004 Plan for the development of the massif, especially the descriptions of the stands and an overview of current challenges and issues. The Plan for the development of a massif is a tool of the CRPF PACA used to tackle forestry management involving a number of landholders. Its first stage calls for carrying out a massif-wide study;
- definition of ten “landscape units”, facilitating the division of the site into ten homogeneous units based on their degree of fragility and role in the landscape. The resulting pattern served as the basis for analysing the challenges and the establish-

ment of proposals for management with the owners involved;

- comparing the proposals from the ten landscape units and working on their overall coherence in order to build up a programme for comprehensive integrated management. This phase involved many audits in the field and debate from different points of view with the DREAL PACA and the PNR du Luberon, finally to reach a consensus on the proposals for management;

- setting up a trial on landscape unit n°2 “La Gardi”, outside the classified site and on holdings of less than 25 hectares, with the aim of demonstrating the ability to carry out integrated intervention, evaluate the results and communicate proceedings to the other partners;

- help for the owners in the overall budgeting and administrative aspects, drafting the Plan in accordance with the guidelines and content stipulated by the DREAL PACA (simulation of the impact of the programmed action on the landscape, situating geographically the viewing points, building up a photo gallery, clarifying vocabulary etc.).

## Summing up

Participative governance, the core of the Qualigouv programme, featured clearly in the experience of the partner “Luberon Nature Park”. It was deployed vertically in accordance with a commonly-held method and encompassed the tools of the Qualigouv programme itself (steering committees and peer group meetings), the framework of the charter “Luberon CFT” and local management at pilot site level.

Further, the pilot site benefits from a 10-year guarantee of sustainable management whose implementation is ensured by the existence of an owners’ association capable of carrying out operations on behalf of its members who have delegated to it tasks related to overall responsibility and strategy.

The management scheme has been integrated into the supply line of the Region’s wood-for-energy sector. Effectively, a contract for supplies has been signed with the Provence Bio Combustibles Cooperative, the regional wood-for-energy facility located at Banon (Alpes-de-Haute Provence *département*). A formal agreement has also been concluded by which dedicated premises been

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made available at Goult as a depot to facilitate forestry operations.

The Massif des Ogres ASL GF has obtained PEFC certification for its management. This certification has meant that the members' commitment to sustainable management for the forested areas of the Ogres de Roussillon massif is now fully recognised.

## Conclusion

The synthesis of the evaluation of the QUALIGOUV programme for the project partner Luberon PNR shows what functioned well when compared to expected or forecast results:

- The technical partnership between PNRL –CRPF was effective and the Qualigouv project enabled the action of the park's tool for governance, the Regional Forestry Charter" (RFC) to be sustained continuously;

- In relation to the project's overall partnership scheme, the workshop seminars organised throughout the life of the project really were opportunities for exchange and pooling of experience and a "Qualigouv network" has been set up. The method employed in driving the project forward (a contribution to added value by the AIFM) played a crucial role in the success of the exchanges, particularly the idea of confronting the peer group perspectives with those of others actively involved in the project;

- QUALIGOUV also made possible various other initiatives, including tools (concerted management plans, SGI-based tools, "marteloscope" –a hands-on experience of selective tree marking, interactive consoles...) and methods.

Hence, the various tools and methods refined in the Luberon, such as the concerted

management plan, the marteloscope of the ONF partner and the participative method for operational management, have been proved transferable.

If other aspects worked less well -including the contribution of the working seminars which were not sufficiently well prepared nor designed with a perspective of their transferability, or communication with the institutions surrounding the project- it nevertheless remains true that certain paths for improving these aspects now exist.

In fact, the synthesis of the results of the various actions can be improved to facilitate the accumulation of shared knowhow as well as the ability to transfer its application. In particular, it would be interesting to highlight the common features of the governance aspect of the programme in order to advance further towards a shared method of governance for Mediterranean forests and woodlands.

Another point worth underlining is the great added value of the project deriving from personal relationships: it is foreseeable that effective, commonly-built action with a more limited scope will emerge between two or three partners confronted by the same issues.

Without QUALIGOUV, we would not have been able to:

- organise encounters between different European regions which have cleared the way for a shared basis for working together and created the embryo of a European-wide regional network of excellence in matters of governance of natural areas;

- acquire the resources for the local trials and experience, resources that it would have been difficult to assemble otherwise, given the innovative nature of these activities.

**G.M.**

## Summary

QUALIGOUV was a project financed by the MED programme. It brought together eight partners from three countries on the theme "Improving the governance and quality of forestry management in protected areas around the Mediterranean". The project of the Luberon Regional Natural Park consisted in obtaining recognition for the Regional Forestry Charter as the reference tool in leading and driving the participative governance of a forestry strategy i.e. the "Forests" section of the Park's charter.

A pilot project run in the Massif des Ogres de Roussillon enabled this participative method to be applied to the setting up of a project for multifunctional management. The *Association syndicale libre Massif des Ogres* was formed (100 members) and a management plan drafted in response to the challenges and issues at the site (improving silviculture, protection against wildfire, preservation of the landscape and biodiversity). The method based on local and regional entities and the pilot site activities were evaluated jointly by all the partners as well as by "peer groups" responsible for an external audit of the undertakings.