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Joint Guide for defining action plans

This guide establishes a methodology for the development of Action Plans for the Dynamic Conservation of the Globally Important Agricultural Heritage Systems (GIAHS)

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Abbrevations

GIAHS	Globally Important Agricultural Heritage Systems
FAO	Food and Agriculture Organization of the United Nations
SDGs	Sustainable Development Goals

Executive summary

The purpose of this guide is to establish a methodology for the development of Action Plans for the Dynamic Conservation of the Globally Important Agricultural Heritage Systems (GIAHS) supported by the FAO (Food and Agriculture Organization of the United Nations).

This methodological guide is therefore intended for technical experts and managers from institutions involved in the implementation of a GIAHS site within a unique agricultural landscape.

TABLE OF CONTENTS

1.- Purpose of the guide 3
2.- Target audience of the guide 4
2.1.- Internal clients – users of the methodology 4
2.1.- Final clients – beneficiaries of the methodology 5
3.- What are GIAHS sites? 6
3.1.- GIAHS 6
3.2.- Characteristics of GIAHS sites. 8
3.2.1.- Global importance or relevance of the system. 9
3.2.2.- Selection criteria. 10
3.2.3.- Cross-cutting aspects. 16
3.3.- The formalization process of a GIAHS site. 17
3.3.1.-The initial informal process. 18
3.3.2.- The construction of the candidacy 19
3.3.4.- Preparation of an Action Plan for Dynamic Conservation 22
4.- Action Plan for Dynamic Conservation. 23
4.1.-Why a guide for the design, implementation, execution, and monitoring of the APDC? 24
4.2.- Concept of Dynamic Conservation 25
4.3.- Preliminary elements of the guide 27
4.3.1.- The entity responsible for the development of the APDC 27
4.3.2.- Adaptation to different institutional realities 29
4.4.- General principles of the Action Plan for Dynamic Conservation (APDC) 30
4.4.1.- System-oriented approach 31
4.4.2.- Community participation linked to the GIAHS site 33
4.4.3.- Capacity building. 38
4.4.4.- Beneficiaries. 38
4.4.5.- Simplicity of formulation 41
4.5.- The APDC in the management process of a GIAHS site 41
5.- Preparation of the APDC 43
5.1.- Vision, mission, and values 45
5.1.2.- Values of the APDC 47

5.2.- Identification of Public Policies and Strategies 48
5.3.- Analysis 51
5.4.- Alignment of the analysis/diagnosis and public policies and strategies 63
5.5.- Objetives 67
5.4.1.- General objective. 68
5.4.2.- Specific objectives 68
5.6.- Impact Indicators. 71
5.7.- Strategic lines. 73
5.8.- Actions. 77
5.8.1.- Reference examples of some actions that can be included in the APDC. 80
6.- Management and execution. 81
7.- Evaluation and consolidation of results. 82
8.- Cooperation networks. 84

1.- Purpose of the guide

The purpose of this guide is to establish a methodology for the development of Action Plans for the Dynamic Conservation of the Globally Important Agricultural Heritage Systems (GIAHS) supported by the FAO (Food and Agriculture Organization of the United Nations).

This methodological guide is therefore intended for technical experts and managers from institutions involved in the implementation of a GIAHS site within a unique agricultural landscape.

According to FAO guidelines, the Action Plan for Dynamic Conservation (APDC) is the key document for the management of sites designated as GIAHS. As such, having this guide is a fundamental tool to support the implementation of an effective strategy.

Since the inception of the discipline of territorial development—or endogenous development—in the 1930s following the global economic crisis of 1929, there has been a persistent lack of methodologies, tools, and knowledge that enable local, municipal, or territorial entities to develop effective strategies.

The most tangible consequence of this has been the growing loss of competitiveness in rural areas, often trapped in isolated, unprofessional, unrealistic, and ineffective approaches when it comes to capturing territorial value.

In too many cases, management teams lack the methodologies and/or practical tools to define a vision, a mission, objectives, lines of action, indicators, and an adequate budget for implementation.

As a result, the strategic formulation in many of these rural/agricultural areas fails to engage the local population or bring about the environmental, social, and economic transformations needed to reverse their decline.

This guide aims to address these gaps for a category of internationally recognized territorial development: the aforementioned GIAHS sites supported by the FAO (Food and Agriculture Organization of the United Nations).

Some of the advantages this guide brings to the territorial management of GIAHS sites include:

- A shared methodology that enables stakeholders in the territory to train their technical teams in the development of a competent dynamic conservation strategy.
- Identification of the target stakeholder groups for APDC implementation.
- Proper identification of threats and challenges within the site or system.

- Implementation of an organized participatory process involving all relevant stakeholders of the territory.
- Integration of GIAHS site actions with broader sectoral strategies and public policies.
- Establishment of lines of action and activities that are realistic, financially viable, and measurable through indicators.
- Facilitation of knowledge transfer among GIAHS territories, helping avoid isolated action in today's knowledge-driven society—since isolation is one of the root causes of strategic errors in rural areas.

Ultimately, this guide aspires to be a strategic tool for the development of these areas, whose agrobiodiversity, landscapes, culture, and production of food and agricultural goods are—or aspire to be—part of the world's agricultural heritage.

2.- Target audience of the guide

The first element to address is to define who this guide is intended for. There are two approaches to consider:

- Who are the groups that will use this methodology. These can be defined as the internal clients.
- Who are the groups to whom the actions of the Action Plan for Dynamic Conservation are directed. These can be defined as the external clients or final clients.

2.1.- Internal clients – users of the methodology

The internal clients include the following groups:

- Technicians involved in the development of the GIAHS site, specifically technical staff from the managing entities of GIAHS sites as well as consultants providing support to these entities.
- Managers of the GIAHS territory. These may include Local Action Groups, Associations, Local Management Entities, Local or Municipal Governments, Regional Governments, among others.
- Professionals with an interest in territorial development, especially rural/agricultural development: universities, public and private research centers, agricultural associations and foundations, etc.

Since territorial management of GIAHS sites essentially involves the management of unique agricultural spaces, there are many areas that, while not officially recognized as GIAHS, share similar characteristics. Among these comparable spaces are certain Protected Natural Areas—especially those that are heavily anthropized and therefore dependent on agricultural activity—Geoparks, and Biosphere Reserves. Naturally, this guide is also applicable to such areas, meaning that their technicians and managers may also be considered potential users.

2.1.- Final clients – beneficiaries of the methodology

In any strategic process—and this guide is designed to support one—it is essential to identify the final clients or beneficiaries. Doing so facilitates the development of value-driven content by shifting the focus from general information to tailored content designed specifically for end users.

The following final beneficiaries have been identified:

- Primary sector operators. Since the main objective of GIAHS sites is the preservation of Globally Important Agricultural Heritage, this is typically sustained by individuals engaged in agriculture, livestock farming, forestry, or fishing.

  In general terms, **the dynamic conservation of a GIAHS site depends on the continuation of traditional activities** by these agricultural producers, who are therefore the primary beneficiaries of this guide.
  It is important to be as inclusive as possible in describing these final clients, showing particular sensitivity toward small-scale operators and groups at risk of exclusion in rural areas—such as women, youth, the elderly, migrants, or people with disabilities.
  As will be discussed throughout this guide, generating value for this broad group often presents specific challenges.

- Agri-food value chain. Following the primary producers, attention must be given to the broader value chain—namely, the individuals and businesses involved in the journey from agricultural production to final consumption.

  Since GIAHS sites are, in many cases, systems of knowledge and food production, this group includes artisanal food producers, producer cooperatives, auxiliary service companies (including independent professionals), traditional and small-scale retailers, and local restaurants.
  In principle, large-scale food producers and distributors are not considered beneficiaries, as they are typically not linked or committed to the GIAHS site. However, the decision to include or exclude such large operators as beneficiaries ultimately lies with the GIAHS site managers.
  In this beneficiary analysis, it is particularly important to adopt an inclusive approach toward vulnerable groups employed within the value chain.

- Local and/or specialized tourism sector. The third category of beneficiaries relates to the often necessary economic diversification of GIAHS sites, specifically through tourism.
  Unique products and their methods of production, landscapes, cultural events, ethnography, agrobiodiversity, and other features are of interest to potential visitors. As a result, many GIAHS systems—alongside sustainable agriculture—see the development of small businesses dedicated to interpreting and delivering tourism services related to the site (e.g., accommodation, guides, restaurants, museums, interpretation centers, etc.).

  These local and sustainable enterprises are one of the target beneficiaries of the Action Plan for Dynamic Conservation.

In addition to the above-mentioned groups, there are other secondary beneficiaries, including:

- Local population, who should benefit from the sustainable value generated by the GIAHS site.
- Civil society organizations, including cooperatives, producer associations, cultural associations, business groups, women's and youth organizations, among others. Strengthening local communities should result in improved resources and activities for these collective bodies.
- Local businesses from other sectors, which may benefit from increased economic activity generated by the GIAHS site.
- Research and training institutions, which should gain from capacity-building efforts associated with the implementation of the GIAHS site.

3.- What are GIAHS sites?

Before beginning the development of the Action Plan for Dynamic Conservation of the GIAHS site, it is important to describe this recognition framework established by the FAO (Food and Agriculture Organization of the United Nations), as it is still largely unknown to much of civil society.

3.1.- GIAHS

FAO Definition of GIAHS

The Globally Important Agricultural Heritage Systems (GIAHS) are agroecosystems inhabited by communities that live in an intricate relationship with their territory.

These evolving systems are resilient, characterized by remarkable agrobiodiversity, traditional knowledge, invaluable cultures and landscapes, sustainably managed by farmers, pastoralists, fishers, and forest communities, contributing to their livelihoods and food security.

Through the Globally Important Agricultural Heritage Systems Program, the Food and Agriculture Organization of the United Nations has designated 95 systems in 28 countries (May 2025).

Expanding and complementing this definition, GIAHS sites are specific agricultural and environmental systems based on sustainable management practices of diverse natural resources adapted to local conditions, which have been created, shaped, and maintained by countless generations of farmers and pastoralists.

These systems are grounded in local knowledge and ancestral experience, which through their agro-cultural ingenuity have generated extraordinary landscapes and mechanisms for the protection of agricultural biodiversity of global importance.

To safeguard and sustain the Globally Important Agricultural Heritage Systems, FAO created in 2002 a comprehensive program for the conservation and adaptive management of GIAHS.

The GIAHS initiative promotes understanding, awareness, and national and international recognition of globally important agricultural heritage sites.



FAO GIAHS Portal:

https://www.fao.org/giahs/en

3.2.- Characteristics of GIAHS sites.

The FAO GIAHS program considers eight key requirements necessary for an agricultural system to aspire to receive this distinction. These key requirements are as follows:

- Global importance or relevance of the system.

Five selection criteria:

- Food security and livelihoods.
- Agrobiodiversity.
- Systems of local and traditional knowledge.
- Cultures, value systems, and social organizations.
- Characteristics of terrestrial and marine landscapes.

Cross-cutting aspects:

- Adaptation to climate change.
- Socioeconomic pressure.

Below is a description of each of these requirements.

3.2.1.- Global importance or relevance of the system.

For a clear description of the global importance or relevance of a given agricultural system, it is important to emphasize its heritage values at the global level, its uniqueness and distinctive characteristics, as well as its contribution to addressing global challenges in the territory.



Adaptation to the terrain of the Málaga raisin GIAHS site.

This description should consider the following aspects:

A. Specific values and characteristics.

This section should address how the GIAHS site performs in relation to the five criteria outlined in the following section. The aim is to explain how the GIAHS site has originally and suitably adapted its relationship with these five dimensions according to the terrain, climate, soil, and society.

B. Historical importance

Description of the historical evolution of the system, highlighting the main processes that have historically contributed to its development. Special attention should be given to the origin of the agricultural system, how it was established, and how it has adapted over time, with the purpose of illustrating the values that link the local system to the broader context of agricultural development.

C. Contemporary importance

Description of the system's contribution to addressing contemporary global problems and challenges, such as food security and nutrition, social and economic well-being, climate change adaptation, rural development, conservation, and the sustainable use of biodiversity, among others.

This section should also address the system's contribution to the United Nations global goals, such as the Sustainable Development Goals (SDGs), and the achievement of international initiatives like the United Nations Decade of Family Farming and the United Nations Decade on Ecosystem Restoration.

D. Comparative analysis

Differences and peculiarities of the proposed system compared to other similar agricultural systems within the same country and/or other countries (comparative study).

The proposed system may have distinctive characteristics resulting from the interaction between humans and nature, as well as the coevolution of communities with the local environment and the long process of knowledge transfer.

The goal of the comparative study is to clarify the similarities and distinctive features of the proposed system, rather than to judge the superiority of one system over another.

Once the global relevance or importance of the GIAHS site is established, the next step is to characterize the five selection criteria.

3.2.2.- Selection criteria.

3.2.2.1.- Food security and livelihoods.

This criterion is developed as follows:

Quality and quantity of the products and services offered by the system:

- Types of products.
- Volume of production.
- Degree of self-sufficiency of the local community.
- Marketing of products in local and global markets.
- Economic functions associated with the products: tourism, food crafts, handicrafts, etc.

Structure and management of the agricultural holdings within the system:

- Number of holdings.
- Size.
- Agricultural system – integration of crops, livestock, etc.
- Forests and related natural areas.
- Structure and training of the workforce.
- Average income per farmer, depending on crops and farm size.

Contribution to the sustainability and resilience of production:

- System's capacity to adapt to climatic conditions and socioeconomic pressures (see "Cross-cutting aspects" on change).
- Ability to continuously guarantee food security and livelihoods.



Example of the provision of safe, healthy, and traditional foods by a GIAHS site.

3.2.2.2.- Agrobiodiversity.

This is the development of this criterion:

Cultivated and harvested plants, and raised animals:

- List of plant species, cultivated or gathered. Common and scientific names. Endemisms.
- List of animal breeds. Common and scientific names.
- Purposes of production: food, animal feed, textiles, crafts, etc.

Distribution of crops and varieties:

- Use of mixed cropping or polycultures.
- Integration of agricultural, livestock, forestry, fishing, and other uses.
- Levels of self-sufficiency.

Ecological functions (ecosystem services):

- Ecosystem services provided by the agricultural, livestock, fishing, or forestry system.
- Species, breeds, and varieties threatened that the system contributes to conserving.
- Synergies between human, agricultural, and environmental activities.

Contribution of agrobiodiversity to the sustainability and resilience of the system:

- Resilience to climatic aspects: droughts, floods.
- Resilience to adverse events: soil erosion, water eutrophication, forest fires.
- Resilience to environmental risks and biodiversity-related issues: significant loss of flora and fauna communities, ecosystem imbalances.



The agrobiodiversity of the system resides in the synergistic use of different crops, practices, and uses.

3.2.2.3.- Systems of local and traditional knowledge



Local and traditional knowledge are part of the agroecosystem of GIAHS sites, providing economic, cultural, and social value.

For this criterion, the following development is proposed:

Agricultural practices, technologies, and related knowledge that ensure good management of the agricultural production system:

- Management practices related to the selection, conservation, and propagation of genetic material.
- Schemes illustrating interrelations and synergies within and outside the farms, highlighting:
    - Agroecological practices used.
    - Integrated pest and disease management.
    - Harvest and post-harvest management practices and technologies.
    - Technologies.
    - Labor support provided (animals, machinery, etc.).

Management of natural agricultural resources:

- Water management.
- Soil management.
- Management of forests and forested areas.

- Biodiversity management.
- Practices that contribute to mitigating negative environmental effects.

Contribution of local and traditional knowledge to sustainability and resilience.

3.2.2.4.- Cultures, value systems, and social organizations



Rural and traditional culture is a key part of the uniqueness of GIAHS sites.

Proposed development of this criterion:

Cultural identity and sense of belonging to the place.

This identity and sense of belonging are integrated into the GIAHS site and form part of it. Local social organizations play a fundamental role in balancing and integrating environmental and socioeconomic objectives.

Specific cultural practices and identity elements related to the agricultural system:

- Beliefs, rituals and symbols, myths, stories, and worldview.
- Music, dances, instruments, and poetry.
- Local languages.
- Historical elements, arts, and crafts.
- Clothing and traditional dress.

Management of the system:

- Number of organizations and associations linked to maintaining the system.

- Identification of the organizations' functions, evolution over time, social participation, representativeness, and leadership.

Collective value systems.

- Customs and communal norms.
- Systems for transmitting knowledge, practices, and cultures.

External organizations that provide support to the system:

- Non-governmental organizations and foundations.
- Public entities and governmental bodies.

Degree of awareness among local communities about the GIAHS site application process and their participation in it.

3.2.2.5.- Characteristics of the terrestrial and marine landscape



The landscape as an intangible asset, a consequence of agricultural and cultural practices.

Description of the evolution of terrestrial or marine landscapes over time:

- Interaction between human activity and the environment.

- Stabilization of this interaction (or slow evolution).
- Landscape form, configuration, and interconnections characterized by prolonged historical persistence.
- Connection of the landscape with the local socioeconomic systems that created it.
- Integration in the landscape of food production, environment, and culture within an area.

Structure of land use and characteristics of terrestrial and marine landscapes.

This description of the GIAHS site should be supported by a description of the terrestrial/marine landscape system with appropriate visual material, such as figures, photographs, sketches, maps, cross-sections, and other types of diagrams.

3.2.3.- Cross-cutting aspects.

There are two cross-cutting aspects that must be taken into account to explain a GIAHS site due to their widespread current impact: climate change and various socioeconomic pressures.

3.2.3.1.- Climate Change

As is widely known, climate change — the alteration of the climate caused by human activity on the planet — has become a threat to all agricultural systems, as these changing conditions cause existing crops, forests, livestock, and fisheries to undergo significant climatic stress by moving outside their ecological niche.

Thus, forested areas decline and are exposed to new pests; agriculture often needs to redefine crops because they become unviable under new climatic conditions (high temperatures, droughts, etc.); livestock suffers from new diseases; and water temperature limits the health and productivity of fish stocks.

In a system such as a GIAHS site, changes in one factor — in this case, climate — lead to changes in a set of variables and, therefore, a need for adaptation.

3.2.3.2.- Socioeconomic pressures

Human development is another broad variable influencing the condition of GIAHS sites worldwide, driving changes in these systems. Some manifestations of socioeconomic pressures include:

- Land use changes: In many cases, socioeconomic pressures translate into pressure on agricultural land for conversion to residential use or other non-traditional purposes.
- Threats from intensive agricultural systems: Traditional agriculture is often being replaced by intensive, industrial agriculture. This shift is driven by the higher short-term profitability of intensive practices, although it is less clear whether this approach can sustain profitability in the medium to long term due to unsustainable resource use.
- Lack of generational renewal: In many GIAHS sites, living conditions—such as continuous work, limited income, isolation in the work, and the difficulty of some tasks—lead young people to prefer other occupations, gradually pushing these systems toward decline due to a lack of generational replacement.

3.3.- The formalization process of a GIAHS site.

Once the characteristics of GIAHS sites have been described, it is important to explain the process for formalizing a nomination of a unique agricultural system before the FAO.

The FAO opens the possibility for all its member countries—virtually all nations on the planet—to submit nominations for a GIAHS site. These nominations must be endorsed by the national governments and require the effective participation of the communities linked to the system, as well as their prior informed consent.

The costs of preparing the nomination are borne by the applicant country, which submits the documentation to the GIAHS Secretariat. The Secretariat is responsible for establishing the rules, procedures, and principles that each proposal must include and for granting the designation.

Although the nomination process is clearly defined, there is no limit on the length of the proposal document. The description must be sufficiently complete and detailed to ensure a clear understanding of the proposed agricultural system. However, it is strongly recommended to avoid unnecessary duplication or information irrelevant to the requirements outlined in the FAO Guidelines.

Next, we will review the process of generating a proposal with a chance of success. As will be seen later, embedded within the proposal will be the Action Plan for Dynamic Conservation, which is the focus of this guide.

3.3.1.-The initial informal process.

The start of a nomination must begin with a shared reflection among people and entities who recognize themselves as belonging to an agricultural system and who also share a common vision of its current situation and future — in other words, a territorial vision that differentiates them from people in nearby agricultural areas.

This shared territorial vision is the seed of an initial informal process, through which the involved parties begin interacting with the FAO's GIAHS program.

Below is a possible outline of the first part of the process, which may vary depending on each context, especially due to the role of public administrations, which can legitimize, drive, or slow down the process, depending on their resources and capacities.

- First step: AWARENESS. Building a GIAHS nomination should be characterized by an informal and collective process of sharing information related to the GIAHS initiative among the local community linked to a unique agricultural system.

  For this, it is necessary that the community recognizes itself as a unique agricultural system (products, crops, knowledge and traditions, landscape, etc.): the territorial vision.

  Initial information will come from the FAO portal as well as other websites/portals specific to GIAHS sites.

  Based on this information, the community may decide to prepare a GIAHS nomination. Preparing a nomination requires a shared vision and commitment among the system's stakeholders, making it essentially a social process.

- Second step: STAKEHOLDERS AND INITIAL GOVERNANCE STRUCTURE. This involves identifying all stakeholders, adopting an inclusive and representative approach of the society linked to the agricultural system and the food value chain of the GIAHS site products.

  At this stage, an initial governance structure must be established so that subsequent phases can proceed in a more structured and organized way, integrating all perspectives and ensuring effectiveness.

  As in all social processes, effectiveness is crucial for maintaining stakeholder engagement throughout the nomination. Poor management (slow, non-participative, lacking communication, overly complex, etc.) can alienate many stakeholders.

It is good practice that the nomination be supported by all stakeholder groups of the GIAHS site.

This stage also defines the position of public administrations, which, while able to provide significant resources for the nomination process, might also monopolize it, marginalizing civil society.

- Third step: INITIAL REFLECTION. This consists of conducting a shared and structured reflection (following the principles of the GIAHS Secretariat) about the future. Before starting technical work, a participatory reflection on the current situation of the GIAHS site, its sustainability (economic, environmental, and social), and its future should be developed to build initial consensus for the formal work ahead.
  An initial assessment of the FAO's five GIAHS criteria may also be useful.

  This step is also important to establish the legitimacy of the governance organization, its representativeness, formal and informal communication channels among participants, and team awareness.

After completing these first three steps, the formal work on constructing the nomination will begin.

3.3.2.- The construction of the candidacy

Starting from the will of civil society, with the support of the administration, the means must be put in place to build a formal nomination that allows access to the distinction as a GIAHS site.

To do this, it is recommended to prepare an initial formal text that identifies the Globally Important Agricultural Heritage System and evaluates the performance of the five FAO criteria. This text will be part of Section II of the nomination document.

This text will be the first working document and will serve as a presentation, integrating all people and institutions wishing to participate in the nomination process: the "Executive Summary."

At this stage, it is necessary to establish a group of participating people and entities (open to the incorporation of interested parties) and a technical working committee, which will be responsible for beginning the characterization tasks of the GIAHS site that must culminate in recognition by the United Nations entity.

This technical working committee must have at least the following capacities related to agricultural, business, environmental, and cultural disciplines for the characterization of

the system, as well as technical means and access to data and documents on which the nomination and its interpretation will be based.

There are two determining factors for the success of this entity, which may be informal or embedded in a formal institution:

- Establish a link with public administrations, or social or academic institutions, to have human and economic resources; without these institutions, progress will be complex due to the lack of means of social entities.
- Achieve that the committee has social recognition and the necessary leadership to unite civil society linked to the system—usually based territorially. This recognition and leadership are related to opening transparent and honest participation channels.

In this regard, it is key that the committee facilitates participation from the beginning, following the principle "no participation, no commitment."

From the moment the committee begins work, a characterization period of the GIAHS site will be opened, which is the basis of information for decision-making by FAO.

There are some initial keys that contribute to the success of a GIAHS nomination and to the preparation of documents that facilitate effective management once approved:

1. The idea of an AGRICULTURAL SYSTEM is the basis for characterization and the Action Plan for Dynamic Conservation. This system-oriented approach must be well developed in all its aspects. Thus, the analytical view of each criterion and factor must be balanced with a holistic vision that talks about relationships, synergies, and complementarities between the parts.
2. Existence of social LEADERSHIP in the proposal and broad social support. According to FAO content, it is critical that a GIAHS site results from social consensus that includes all interest groups—aligned with the UN's "leave no one behind" motto.
3. The proposal must be built on a SHARED TERRITORIAL VISION around the GIAHS site that has enabled the creation of a clear narrative of the system. This shared vision must become formal, written, and communicated.
4. The proposal must clearly define the reasons why the proposed GIAHS site has WORLDWIDE IMPORTANCE/RELEVANCE. As explained in previous chapters, this importance or relevance must be argued based on the past, present, difference with nearby territories, and the approach of the 5 criteria.

5. PRECISE AND RELIABLE INFORMATION EXISTS: The territory of the GIAHS site must be clearly delimited, mapped, and characterized rigorously (addressing all GIAHS criteria), with scientific support and objective evaluations.

Finally, in this nomination process, the final document must follow the index provided by the FAO GIAHS Secretariat. Each section should have chapters. In its Nomination Guidelines document (https://www.fao.org/giahs/become-a-giahs/en), FAO suggests the following structure:

- Cover page
- Index
- Section I. Summary Information Table
- Section II. Executive Summary
- Section III. Importance of the Proposed System
- Section IV. Selection Criteria of the GIAHS sites: 1, 2, 3, 4, 5
- Section V. Action Plan for Dynamic Conservation
- Bibliography
- Annexes

The nomination documentation must be accompanied by the following documents:

- Map delimiting the GIAHS site
- Physical maps describing the territory
- Photographs, videos…
- Testimonials
- Description of existing biodiversity
- Cultural, anthropological, literary references, etc.
- Ethnographic and festive elements related to the GIAHS site
- Mechanisms related to actors: social organization
- Existing institutional, academic, and social support
- Relevant bibliography

3.3.3.3.- Visual Material and Maps

Given the importance of visual material and maps for the characterization of a GIAHS site and for decision-making, the following recommendations are made:

- Photographs (and videos, if available) should be included to facilitate understanding of the content described in the document (preferably embedded within the body of the document, where appropriate).

  Additionally, whenever possible, comparisons between historical and current photos (preferably taken at the same locations) are encouraged, as these can be useful to illustrate how the agricultural landscape system has evolved over the years.

- The use of other visual materials (such as figures, diagrams, charts, hand-drawn sketches, planimetric maps, terrain cross-sections, color images, and other illustrations) is essential for understanding the proposed agricultural systems.

  For example, the inclusion of a diagram illustrating the interrelationships among the different components of a system (agricultural, cultural, economic, environmental, social, etc.), as well as the evolution of the landscape throughout the production cycle and over time, is highly recommended.

- All maps in the proposal document must have high visual quality (high resolution). Specifically, the application requires two main cartographic outputs:
  - A geographic map showing the exact location of the proposed system, its clear boundaries, and the geographical conditions delimiting it.
  - A land use map showing all the land uses and land cover of the proposed site.

The use of additional maps throughout the application (climatic, topographic, contour lines, etc.) is recommended whenever they provide relevant information for decision-making.

3.3.4.- Preparation of an Action Plan for Dynamic Conservation

An Action Plan for Dynamic Conservation (APDC) must be developed and included within the candidature document of the proposed GIAHS site, constituting the main strategic tool for planning and monitoring the system. The APDC will be part of the candidature document, specifically Section V.

Before detailing each section of the APDC in the following chapters, the following aspects must be taken into account:

- The APDC must identify, evaluate, and analyze the threats and challenges described in the five FAO selection criteria.
- The plan must provide a detailed description of the specific measures to be developed (including policies and strategies) so that they are manageable.
- The APDC will justify how each action responds to the identified threats and challenges in the diagnostics. An assessment of the adequacy of these actions to address the threats and challenges must also be carried out.
- The plan will provide supplementary information on responsibilities related to the established actions, implementation schedule, budget estimation and funding sources, stakeholder participation, and monitoring and evaluation procedures, among others.
- The APDC must ensure that actions are results-oriented and include a monitoring and evaluation plan that enables improved management of the GIAHS site.

4.- Action Plan for Dynamic Conservation.

The Action Plan for Dynamic Conservation is the strategic tool for planning, implementing actions, and monitoring the GIAHS site. Therefore, it must consider the following factors:

- Establish the vision, mission, and values associated with the GIAHS site.
- Diagnose the threats and challenges facing the system.
- Integrate into the plan the accessible resources from strategies and public policies, as well as private financial sources.
- Determine the objectives and strategic lines to carry out the dynamic conservation of the system.
- Propose actions for the development of the strategic lines.
- Align the actions with the diagnosis and the vision/mission.
- Foster participation.
- Establish feasible and verifiable schedules, budgets, indicators, and funding sources.
- Implement the actions and monitor their progress.
- Periodically evaluate the results, correcting deviations from the plan.

Based on this definition, the following sections provide a detailed description of the APDC contents.

4.1.-Why a guide for the design, implementation, execution, and monitoring of the APDC?

Before beginning the characterization of each section of the APDC, it is important to justify the purpose of this guide—that is, why it is important to develop a guide for the preparation of these plans.

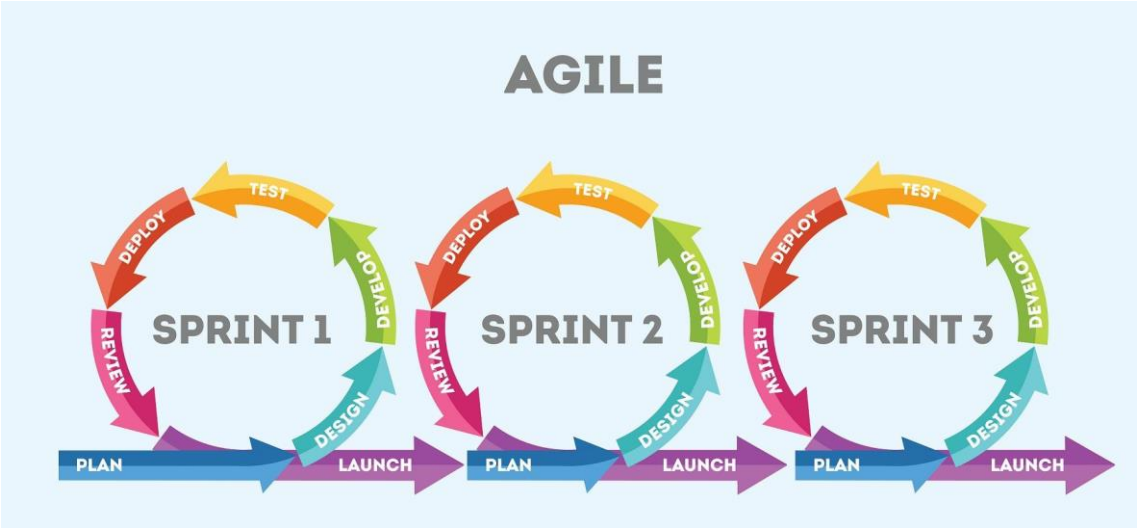
Here are some of the reasons:

- This guide addresses a need, given that the FAO has not provided a detailed description of the content of the Action Plan for Dynamic Conservation. This has led to plans of varying nature and detail. While systems differ, the plans should have a homogeneous structure.
- A guide such as this facilitates the work of the entity/entities responsible for submitting the candidature of a GIAHS site, by standardizing the content and thereby improving the quality of the submitted document.
- Furthermore, the guide provides uniformity to GIAHS site proposals, allowing:
    - Effective implementation—saving resources by following a structured model.
    - The APDC generation process to be more transparent, facilitating participation.
    - Easier evaluation of the APDC and its actions by independent external entities.
    - The homogenization of plans enables social learning from evaluations: What works? What doesn't? This opens the door to knowledge exchange among GIAHS sites and the generation of best practices.
    - The exchange of information and training of technicians on the guide, the APDC, and its management.
    - The improvement of APDCs over time, based on experience and evaluations.

As noted, the objective of this guide is to deepen the methodology for the development of the Action Plan for Dynamic Conservation for GIAHS sites based on the guidelines established by the FAO.

This methodological deepening will allow technicians and managers responsible for preparing the APDC to work more efficiently in all respects, without having to create a document from scratch for each system.

Additionally, using a methodological guide allows for progressive improvement of the content based on the experience gained from evaluations; therefore, this is the first version of the guide, which can be improved and adapted to the specific needs of the planning process.



The development of this guide, following agile principles, allows both the guide itself and the quality of the APDCs to be gradually improved through evaluation and learning processes.

Having a methodology also facilitates the development of specific training content for the APDC, enhancing the skills of technicians and managers of the GIAHS sites.

In another sphere, a common methodology is the foundation for knowledge transfer between GIAHS sites, generating ideas, projects, techniques, and actions that accelerate value creation and limit the existential threats faced by many GIAHS sites.

4.2.- Concept of Dynamic Conservation

Dynamic Conservation is the most important concept associated with GIAHS sites and refers to a management and protection approach that continuously adapts to natural and anthropogenic variations and processes in the territory.

This concept is based on the idea that ecosystems and the factors influencing them (such as climate, human activity, species migration, and other ecological processes) are in

constant change, so conservation strategies must also be flexible and evolutionary, not limited to a traditional conservation strategy that seeks to preserve the space or system.

Expanding on this, GIAHS sites are not exactly a protection figure, but a recognition of an agricultural system with significant resilience and the ability to adapt to natural and human factors with which it interacts.

An agricultural system maintains dynamic conservation if it is able to preserve its functionality despite changes.

Functionality is understood as the maintenance of the five FAO criteria (food and livelihood security, agrobiodiversity, local knowledge, landscape, and culture).

Therefore, dynamic conservation is a transversal and systemic concept that requires the management of agricultural activities, the agri-food value chain, value creation for society, and the maintenance of environmental values.

Thus, if in a National Park the management objective is to maintain natural values as much as possible despite changes in the environment, in a GIAHS site the management objective is to maintain functionality, changing aspects to adapt them to the changes.

In other words, dynamic conservation respects the past, lives in the present, and adapts to the future.

Currently, there are two general threats to most GIAHS sites, that is, two types of changes that impact almost all systems, as mentioned:

- Climate change.
- Socioeconomic pressure.

The first, with abrupt changes in rainfall patterns, temperatures, and catastrophic events, threatens many GIAHS sites by pushing agricultural activity out of the climatic niche in which it developed, forcing producers in these systems to move from progressive adaptation to drastic changes in their activity.

The second relates to socioeconomic pressure: rapid social and technological changes threaten aspects such as:

- Traditional sustainable production, replacing it with unsustainable industrial intensive production in the long term, but more profitable in the short term.
- Pressure on land use, limiting the availability of space for traditional activities—especially in areas close to metropolitan zones.

- Lack of generational renewal, which threatens the continuity of farms associated with a rural way of life, with low income and continuous, sometimes difficult work obligations.



La Geria, with its unique cultivation of vineyards in volcanic sands, is part of the agricultural system of the volcanic island of Lanzarote. The manual labor required for this cultivation demands specialized workforce, involving highly demanding tasks.

4.3.- Preliminary elements of the guide

Once the usefulness of the guide and the critical concept of Dynamic Conservation have been established, the next step is to identify a series of practical precepts that must be observed in the development of the guide, which are:

- The entity responsible for the development of the APDC.
- Adaptation to the local reality of the GIAHS site.

4.3.1.- The entity responsible for the development of the APDC.

Although the Technical Working Group of the GIAHS site candidature has been characterized in a previous section, the drafting of the APDC is a more specialized process, as will be seen below, and it may require the participation of an entity with sufficient technical and economic resources.

In any case, it must be the Technical Working Group that chooses among the following options:

- The Technical Working Group itself will develop the APDC.
- An entity with greater resources will develop the APDC.

- A professional consultancy will carry out the APDC.

There are no a priori advantages of one approach over the others; each GIAHS site must find the APDC development model that best fits its characteristics.

Without contradiction, the entity responsible for drafting the APDC must have the following characteristics:

- Social leadership. Whether from the entity itself or granted by the Technical Working Group, it is necessary that the drafting entity has a legitimizing mandate from the system's stakeholder groups.
- Institutional leadership. As will be seen, much of the APDC will depend on public resources, so the entity must have institutional support to achieve a feasible plan that productively relates to the vertical policies and strategies of public institutions.
- Technical capacity. Drafting a plan requires a multidisciplinary group of professionals (agricultural, environmental, social, economic, cultural, marketing, etc.). Therefore, it is critical that the entity has this capacity.
- Economic capacity. Associated with technical capacity, the processes of documentation, participation, and communication require financial resources that must be taken into account.



The goats climb these low argan trees to eat their leaves, fruits, and nuts. ©Nadiia Zamedianska/shutterstock.com

4.3.2.- Adaptation to different institutional realities

The other preliminary element is the adaptation to the local institutional environment of the entities involved in the candidacy and in the drafting of the APDC. Each GIAHS site is different, as each one has distinct physical, geographical, social, environmental, and economic conditions. Most importantly, each one also has a diverse institutional environment, resulting from differences in governance across regions, countries, and continents.

For example, on an island, the island government may be the institution that supports the creation of a GIAHS site—providing the necessary funding—while in another GIAHS site, it may be the municipal government, in another the provincial or regional government, and so on.

On the other hand, the management of GIAHS sites can be carried out by public or private entities (associations or foundations), although the participation of civil society is a requirement.

Another important issue related to the institutional environment is determining who will be the entity responsible for developing the candidacy and therefore for the GIAHS site. It is critical that the Technical Working Group is able to find institutional allies, adapting to the context, in order to ensure the development of a candidacy with a high likelihood of success. For this, the involvement of public institutions will be key.



The Agricultural System of the Salt Valley of Añana, located in the province of Álava (Spain), is managed by an entity dependent on the provincial administration (Álava Provincial Council).

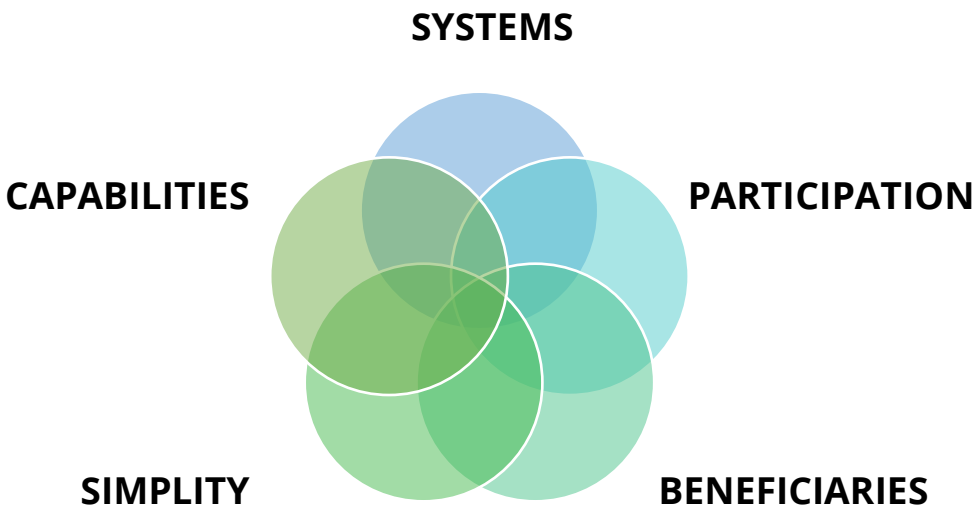
4.4.- General principles of the Action Plan for Dynamic Conservation (APDC)

Once the shared interest in developing joint guidelines for APDCs has been confirmed, the guiding concept of Dynamic Conservation established, and the two preliminary aspects addressed—namely, the drafting entities and the adaptation to the institutional environment—the final step is to identify a series of principles that must be observed transversally throughout the APDC.

The following general principles have been identified:

- System-oriented approach.
- Participation of the community linked to the GIAHS site.
- Capacity building.
- Characterization of beneficiaries.
- Simplicity in formulation.

The following diagram presents the general principles.



4.4.1.- System-oriented approach

Definition of SYSTEM: A set of interconnected elements that work together to achieve a common goal.

As previously indicated, GIAHS sites are systems—agroecosystems. This implies that the parts do not explain the whole; therefore, an analytical approach that works separately with each element is not feasible. This must be complemented by a holistic (or heuristic) approach that considers the relationships between the parts.

GIAHS sites are systems, which means the APDC must apply a systemic approach that considers all elements and their interrelations.

Delving deeper into this important concept, there are no independent parts—everything is interconnected. For example:

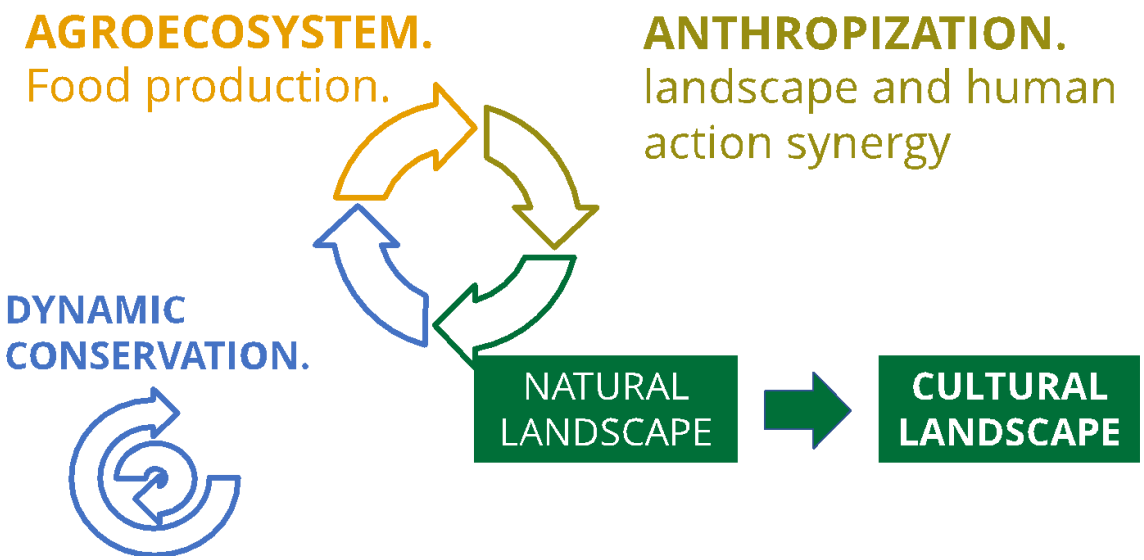
- The decline of a cultural ritual in a GIAHS site may lead to a loss in agricultural production if that production was oriented toward visitors attending the ritual.
- The loss of an environmental area may have agricultural consequences due to increased erosion and soil degradation.
- A change in land use may lead to more intense flooding, affecting the landscape.

Within this orientation, several concepts help in understanding systems:

- Dynamic Conservation: As previously discussed, physical conservation is to some extent replaced by functional conservation. It is not about maintaining the status quo but about adapting.
- Anthropization: Landscapes, natural areas, biodiversity, etc., have been shaped by human activity—they are not solely the result of natural processes. For example, the agro-silvo-pastoral system of Barroso in Portugal, with undeniable natural values, is a product of sustainable human action. Anthropization implies that the elimination of human activity from a system leads to ecological changes—such as the spread of scrub vegetation in formerly grazed (anthropized) areas.
- Agroecosystem: A GIAHS site is an ecosystem based on agricultural activity—be it farming, livestock raising, forestry, or fishing. Due to the systemic logic, this agricultural activity includes economic manifestations (processing, auxiliary products, etc.), social aspects (such as specific organizations), environmental dimensions (e.g., conservation areas or biodiversity zones), and/or cultural elements.

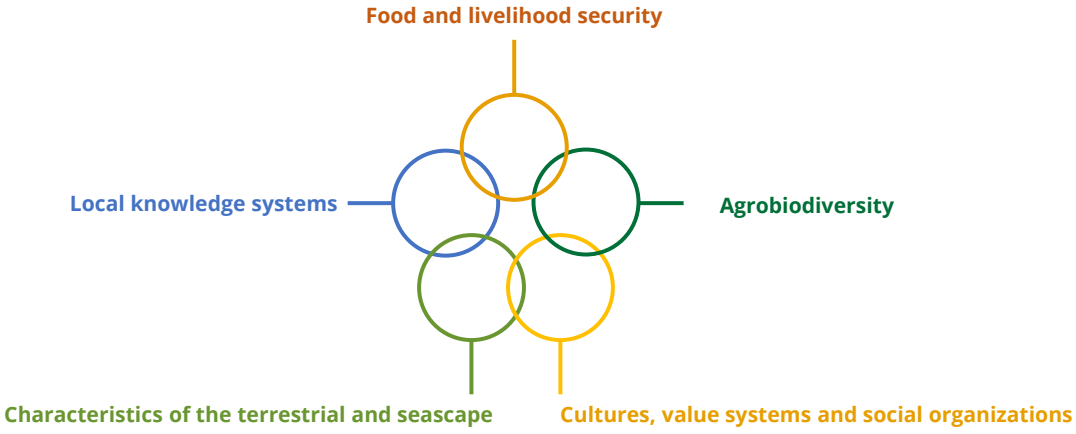
- Cultural Landscape: Contrary to popular perception, the landscape in these systems has been shaped by humans. Even though it may contain natural values, it goes beyond them, encompassing processes related to living within the ecosystem. These are, therefore, cultural landscapes.

The following illustration shows how these four concepts converge in the system-oriented approach.



FAO proposes another complementary approach to systems, using the five criteria of the GIAHS application, which are the criteria that define a GIAHS site.

The following diagram graphically represents the relationship between them.



Once again, the five criteria are interconnected and interrelated.

4.4.2.- Community participation linked to the GIAHS site

"No participation, no commitment."

The following concept is one of the defining features of the GIAHS designation: **social participation**. As mentioned, the process of developing a proposal and managing a GIAHS site is a social process—considering the system concept—and must be managed as such.

The challenge of participation is to undertake a collective and cooperative working process that requires honesty, transparency, and effectiveness. Otherwise, the people and entities involved will become demotivated and abandon the process.

In these social contexts, the legitimacy of processes, organizations, and candidacy efforts depends on adopting a participatory, open, and inclusive approach that considers all interests and groups (some of which may be reluctant to engage in this type of dynamic).

For participation to be effective, it is necessary to have skilled technical personnel capable of facilitating these dynamics. It is also advisable that this personnel have a good understanding of the local reality so their examples and actions resonate with it, avoiding the perception that the process is external or foreign.

These are the three key aspects to consider in the participation process:

- Identification of stakeholders.
- Participation process.
- Co-design of content.

Additionally, this participation chapter will consider two other important aspects:

- The timing of participation development.
- Integration of an outside-in perspective.

4.4.2.1.- Identification of stakeholders

The first logical step in a structured and effective participation process is the development of a Stakeholder Map that has the following characteristics:

- The Stakeholder Map must be comprehensive, meaning it should include all relevant actors and interested individuals — including non-obvious groups such as cultural associations or people living elsewhere who still feel connected to the territory.

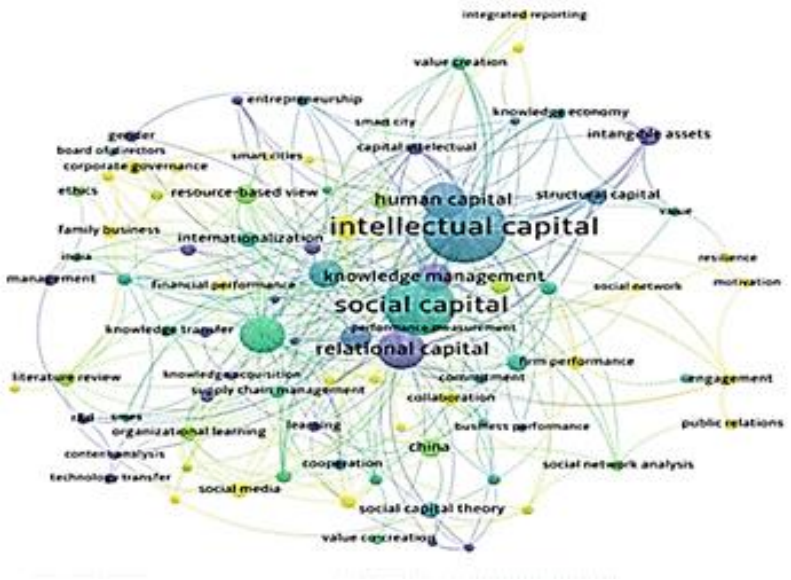
It is about working with a collective that represents all sensitivities within the GIAHS site. It is key that all these stakeholders are informed about and invited to the participatory process.

Naturally, among the entities invited to participate will be agricultural producers, the agri-food chain, the sustainable local tourism sector, civil society associations, public institutions, universities, and training centers, among others.

- In addition to identifying stakeholder groups, it is recommended to define preferred communication channels for each group, so that communication regarding activities and invitations to participatory events are effective. It is important to consider that, in many cases, some groups do not use traditional communication channels.

  Establishing communication channels with primary producers is especially important.
  It is also advisable, within the Stakeholder Map, to include informal notes related to each group's interests, so that they can be engaged with narratives that resonate with them regarding the participatory tasks.

- Finally, it may be useful to develop a relational map using some of the digital tools available. Using these types of applications requires the technical team to have advanced knowledge of them, as well as a deep understanding of the GIAHS site situation.



Example of a Relational Capital Map.

4.4.2.2.- Participation process.

Once the stakeholder groups for the participatory process have been established, the next step is to structure and develop that process. Here are some key points:

- Establish the scope of impact of the GIAHS designation for a territory. What is a GIAHS site? And what can the local community expect from this designation? It is crucial that all interested participants understand the scope in economic, institutional, environmental, cultural, and social terms of achieving this recognition. Not knowing the scope is a risk, as it can lead to disappointment and a decline in social support and participation in the GIAHS site. In this regard, it may be helpful to show results from specific GIAHS site cases as work references.
- Access to information. This process requires providing updated, relevant, and accessible information—in terms of location, format, and language. This will almost certainly entail additional costs for the preparation of the nomination, the drafting of the APDC, and the management of the system itself.
- Incentives for participation. Although sometimes controversial, the development and popularization of digital marketing techniques recommend establishing participation incentives such as snacks or small gifts in exchange for dedication (tickets to events, invitations or tastings, typical product packages, etc.). There is evidence that these motivations increase participation among many groups, including primary producers, who are the priority group.
- Understand relevance and leadership. For effective participation, it is critical to understand the local social dynamics of relevance and leadership; numerical participation alone is not enough. Ignoring these factors can delegitimize the participation process.
- Based on these principles, it is recommended to develop a participation plan that allows the management of interviews, surveys, focus groups, technical sessions, meetings, and other informal or recreational events to be automated in terms of communication and organization.
- Online vs. in-person participation mode. The rise of digitalization has led to the proliferation of virtual meetings versus in-person ones. This has positive aspects, such as facilitating work-life balance and reducing travel—important in large GIAHS sites. However, it also has downsides related to difficulties reaching people with low digital skills—such as many primary producers—and in creating work teams and synergies. Therefore, it is recommended to balance online sessions with in-person ones.

4.4.2.3.- Co-design of contents.

The objective of a participatory process is not only to inform the different stakeholder groups about the identified or executed actions; it is not about "selling" the GIAHS site. The goal is the development of co-design of contents.

This is a real challenge for the professionals responsible for drafting the APDC, as it requires matching the pace of the participants, using accessible language, and maintaining an open attitude toward incorporating unforeseen content.

The co-creation process begins, first of all, by developing a shared diagnosis of the current situation and a collective vision for the GIAHS site project, as previously mentioned. There are numerous tools available, among which we highlight Lego Serious Play, which allows participants to construct a common vision in an engaging way using the well-known plastic pieces from this company.

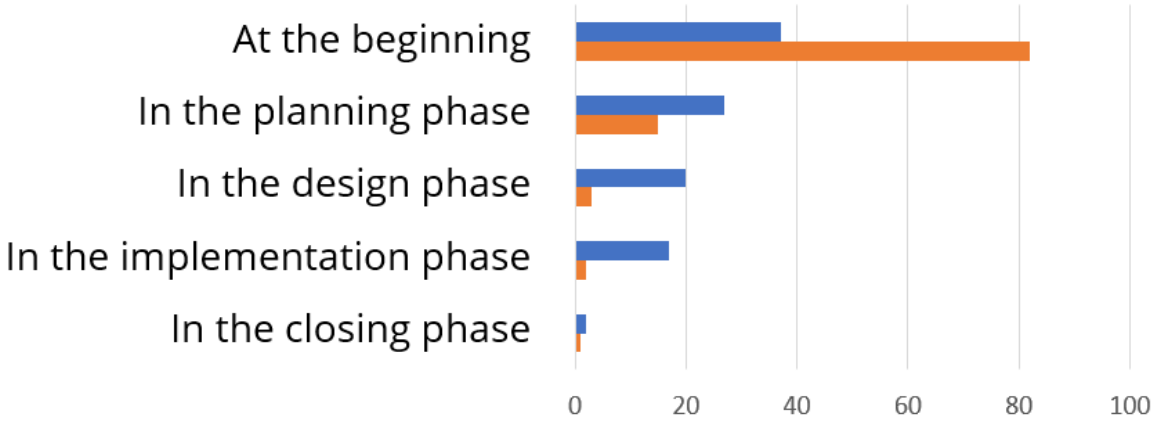
The development of this guide should, over time, enable learning from other tools as the method for constructing the APDC becomes standardized.

4.4.2.4.- When participation should take place in the development process of the GIAHS site.

According to numerous studies related to participation, including the one shown in the illustration below, it is critical to encourage participation at the beginning of the GIAHS site nomination process, as support throughout the process improves the motivation and involvement of people and entities in the development of the system—following FAO guidelines.

As shown in the graph below (Prosci 2009. Best Practices in Change Management), a study on change management—closely related to the development of a GIAHS site—asked numerous change process managers about the best time to implement participation.

The blue bars indicate when participation was incorporated in current processes, while the orange bars show when it will be integrated in the next change process. As can be seen, many managers have understood the importance of incorporating the participation process at the very beginning of the work.



Thus, it is recommended that the participation process be developed at the beginning. This is a challenge for any collective project, such as the development of a GIAHS site.

4.4.2.5.- Integration of the outside-in perspective.

According to numerous studies and technical documentation, basing development solely on internal, "bottom-up" participation presents some challenges related to the effectiveness of proposed actions. Generally, especially in cases involving communities deeply rooted in the land, internal participation is effective for identifying problems or threats — that is, anything that jeopardizes the status quo of farms, local businesses, and society in general. However, it tends to be weaker when it comes to identifying opportunities or challenges, which are usually linked to more dynamic groups closely connected to urban areas.

It must not be forgotten that, in general, GIAHS sites need to transition from a self-sufficient, low-income economy to an open economy capable of generating value thanks to their uniqueness, engaging dynamic groups with higher per capita income. Otherwise, the FAO's recognition program would lose its purpose.

For this reason, it is interesting to complement participation efforts with activities based on external trend studies — benchmarking with other territories, involving potential clients of the territory, working on the urban vision of the GIAHS site, etc.

In this regard, it is also valuable to include experts from universities — providing scientific support — who bring a rigorous and often complementary perspective to the insights gained through participation.

4.4.3.- Capacity building.

Another principle to consider in the development of the APDC is the building of local capacities.

The participatory process is an opportunity to promote the endogenous development of the system, which consists not so much in "doing for the local community" but in "doing with the local community." Although this may slow down activities, it guarantees the medium-term sustainability of the work.

Working with the local community requires:

- Technical training processes in the areas related to the GIAHS site — agricultural, business and entrepreneurship, social, cultural, tourism, and/or environmental — for the population. Training must be part of the APDC of the GIAHS site. In this regard, it is recommended to develop a training needs diagnosis adapted to the local community. This diagnosis can be integrated as an action within the APDC.
- The development of local entrepreneurship is especially important, as it allows opportunities to be seized and ensures generational renewal. For this reason, it is recommended to carry out work in this area, such as identifying opportunities, training and supporting entrepreneurs in rural/agricultural fields, business networking, seed capital funds, etc.

For these reasons, capacity building must be part of the APDC.

Although integrating training into the local community may seem easy, it often presents real difficulties due to the challenge of adapting to different profiles, especially the beneficiaries linked to agricultural holdings, as detailed below.

4.4.4.- Beneficiaries.

It is important that the development of the Action Plan for Dynamic Conservation takes into account the special characteristics of the main beneficiaries, especially the primary producers. In general, this group shares a series of common characteristics worldwide, although these must be verified for each individual GIAHS site.



Shepherd with a flock of sheep in the GIAHS site of the León Mountains.

As indicated, primary producers—people engaged in agriculture, livestock, herding, forestry, or fishing—are the heart of GIAHS sites, the foundation of agroecosystems. Therefore, much of the work in the Action Plan for Dynamic Conservation (APDC) must focus on maintaining their activity while adapting it.

Over time, these individuals have adapted their activities to the natural, technological, and human environment. However, today the changes in the environment—such as climate change and socioeconomic pressures—are becoming more intense and rapid. This is generating adaptation challenges that lead to system decline. To address this systemic threat, it is crucial to provide this group specifically with the necessary capacities and tools.

But providing capacities and tools to this group is complex due to the following general characteristics:

- In many cases, primary producers have seen how these changes have reduced their profitability, forcing them to put in greater effort to maintain their livelihood. This leaves them less time and fewer resources to experiment, learn, and undertake new initiatives. They also have less time to participate.

  Thus, this group often shows characteristics of inertia or skepticism toward change processes. Overcoming this barrier requires social work and support. Moreover, the mentioned loss of profitability has created a negative dynamic in this group's perception.

- Primary producers tend to have a higher average age compared to the general population. In fact, it is estimated that in many cases traditional agriculture will be abandoned in the coming years if issues related to generational succession are not addressed.
  Social work often faces the paradigm of people who feel it is not worth changing because they have limited working life left.
- The valorization processes of primary production related to GIAHS sites are complex, as they require addressing complex consumers and involve activity diversification—especially when incorporating tourism aspects.

  Also, in many cases, primary producers lack business independence to implement changes in valorization or business models, as their position in the value chain is limited to selling to cooperatives, wholesalers, or distributors who often do not align with producers' interests. The food chain structure forces them to compete with intensive and/or industrial producers, which exert downward price pressure, reducing opportunities to develop projects that improve producers' positions.

  In this regard, globalization and logistics development, with food imports from other countries, are additional factors pressuring prices downward.
- Globally, primary producers tend to have lower academic education rates compared to the rest of society, further complicating the change processes mentioned.
- This group also presents below-average digitalization rates, making it harder to leverage the advantages associated with digitalization as well as communication to promote participation.
- The final factor is related to the breakdown of generational succession. While in the past, primary producers were concerned with maintaining their activity and passing it on in good condition to heirs, nowadays many heirs do not want to take over, resulting in abandonment.

These general problems show that working with the primary producers' group to overcome rapid and profound changes is a complex challenge requiring a team with professional skills and advanced knowledge.

We'll give an example of this type of complex problem. In many agricultural areas, such as the GIAHS site for raisins in Malaga, one practice that would improve the agronomic situation of vineyard farmers in the medium term would be the adoption of regenerative agriculture techniques that significantly increase soil resilience and fertility. But there are many difficulties in adopting these practices: the first is that the practices are complex,

and farmers lack the necessary knowledge to implement them. It's difficult for them to seek training for several reasons: first, because, in general, they have never learned through formal training programs. Second, because their daily routines leave them little time to learn, given that their income and time are increasingly compromised by the loss of profitability. Furthermore, why work in the medium term when intensive agriculture offers better returns in the short term? And also, it makes no sense to start developing a long-term project if there is no heir to take care of the farm, etc. These are the problems that must be addressed and that require professionals with a high capacity for intervention and innovation.

As explained in this section, intervention in GIAHS sites is complex, and there are important circumstances related to the main beneficiaries that hinder the implementation of changes needed to address the current natural and human uncertainty.

4.4.5.- Simplicity of formulation

For the reasons stated above, in general terms, rural societies have difficulties in understanding complex planning documents, such as those often produced for this type of project.

This is why, in order for the dynamic conservation strategy to be widely shared, an effort toward simplification must be made. It is a rule to be observed: the more complex the Plan is, the less it will permeate the local/agricultural society. Long texts, a large number of action lines and measures, etc., are elements that hinder the assimilation of the strategy.

Another useful rule is the prioritization of activities, so that the implementation of secondary measures does not take precedence over critical ones.

Ultimately, addressing the challenge of dynamic conservation requires a great deal of honesty in the way reality is approached.

Simplicity comes from aligning the analysis, objectives, indicators, and strategic lines with the 8 FAO factors. These circumstances have been taken into account during the formulation process of the plan.

4.5.- The APDC in the management process of a GIAHS site

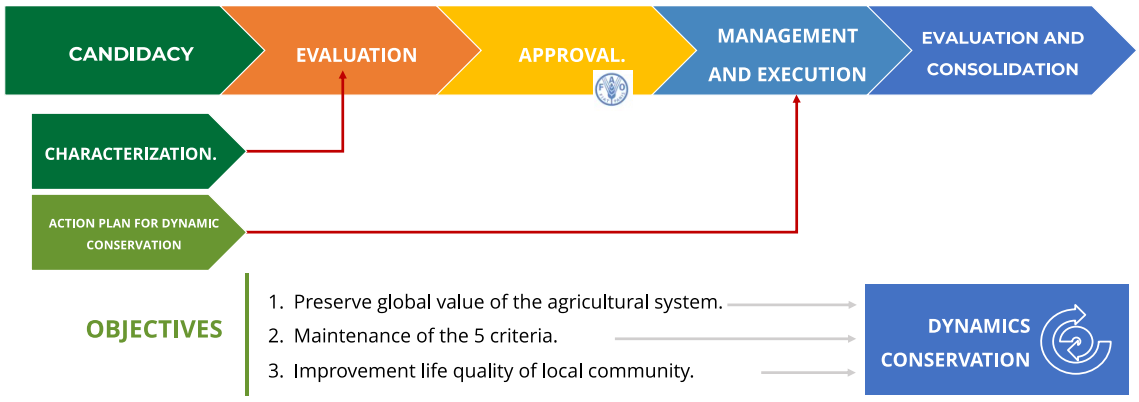
As indicated, the APDC is a document that forms part of the application, since according to the conditions established by the FAO, the approval of a GIAHS site must be associated

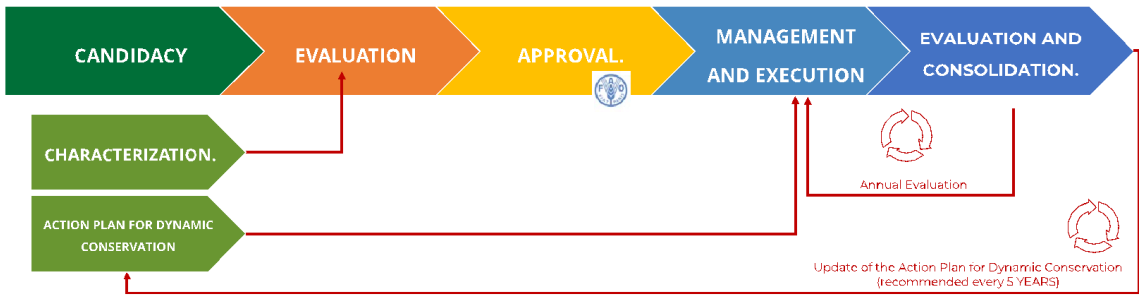
with having a plan that guarantees the dynamic conservation of the system. This plan will be, once the GIAHS site is approved, the guiding document of the strategy.

Thus, the plan is submitted within the application, but the implementation of the APDC by the entity in charge of governance will begin once the GIAHS site recognition has been granted.

As outlined below, the execution of the APDC should be evaluated continuously. It is proposed that efficiency be assessed annually —the capacity of the actions to achieve the objectives— and the effectiveness of the actions —the capacity of the actions to move closer to the collective vision— be evaluated every five years.

The following illustrations show these circumstances:





At the end of the five-year evaluation and the corresponding analysis, a new APDC should be prepared that incorporates a new diagnosis and the lessons learned from the evaluation process for the following five years.

The evaluation chapter outlines the content of the annual and five-year reviews of the plan.

5.- Preparation of the APDC

Retrospective.

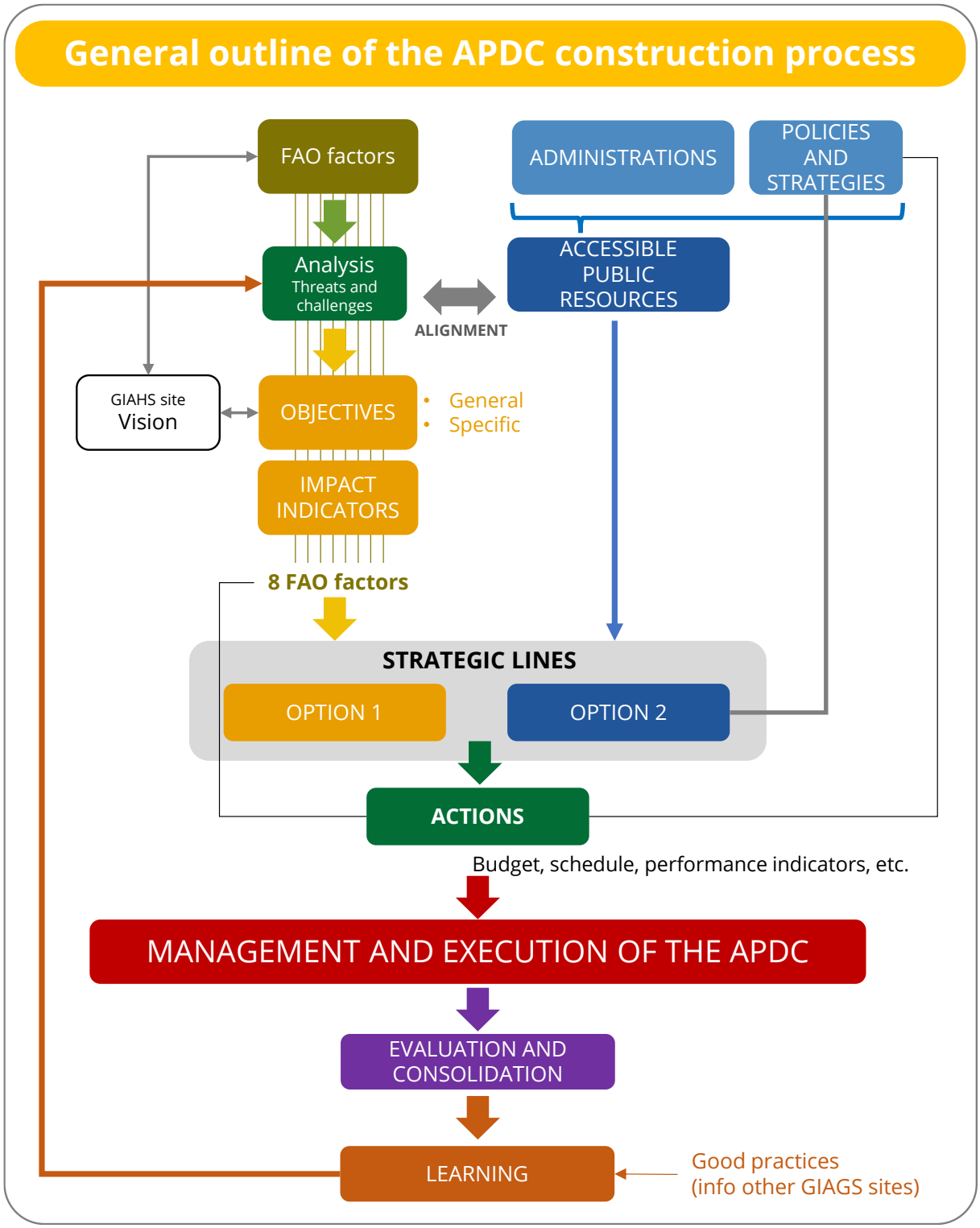
Once the foundations of the APDC have been established—its usefulness through standardization, the concept of dynamic conservation, the preliminary elements, the general principles, and the role of the plan within the management of the GIAHS site—the objective of this chapter is to provide a comprehensive description of the APDC that contributes to its effective drafting.

The objective of this chapter is to provide a comprehensive description of the APDC so that a qualified technical team can successfully develop a consistent Action Plan for Dynamic Conservation for a GIAHS site.

The following structure is proposed:

1. Vision, mission, and values
2. Accessible public resources (identification of public policies and strategies)
3. Analysis/diagnosis: threats and challenges
4. Objectives
5. Impact indicators
6. Strategic lines
7. Actions
8. Management and implementation of the APDC
9. Evaluation and consolidation
10. Learning

The following illustration shows the proposed process.


General outline of the APDC construction process
FAO factors
ADMINISTRATIONS
POLICIES AND STRATEGIES
Analysis
Threats and challenges
ACCESSIBLE PUBLIC RESOURCES
ALIGNMENT
GIAHS site
Vision
OBJECTIVES
General
Specific
IMPACT INDICATORS
8 FAO factors
STRATEGIC LINES
OPTION 1
OPTION 2
ACTIONS
Budget, schedule, performance indicators, etc.
MANAGEMENT AND EXECUTION OF THE APDC
EVALUATION AND CONSOLIDATION
LEARNING
Good practices
(info other GIAGS sites)

5.1.- Vision, mission, and values

The first specific section of an Action Plan for Dynamic Conservation is the description of the Vision, Mission, and Values of the GIAHS site.

It is very likely that part of the content of this chapter has already been established through the participation process carried out prior to the formulation of the APDC; in that case, it will be incorporated into the APDC.

The vision/mission of an organization or collective project is the foundation on which the plan or strategy must be built.

Here is the definition of each of these two elements:

We can define **vision** as:

- It is the desired future, the long-term goal to be achieved.
- It describes what the entity wants to be in the future.
- It is an inspiring image of the future.
- It serves as a guide for strategic planning and long-term decision making.
- It helps establish long-term objectives and goals.

Regarding **mission**:

- What the initiative does and for whom (Stakeholders).
- It describes the purpose and commitment in the present.
- It focuses on daily activity and the results developed.
- It is the basis for decision making and short- and medium-term planning.

According to these definitions, both vision and mission must be concise, explicit, and capable of communicating and engaging all stakeholders related to each GIAHS site. Additionally, both elements must be aligned so that they form a consistent narrative.

The vision and mission tell the story of what we want to be and how we are going to get there.

It is important to clarify which entity the vision or mission is defined for. This may seem trivial, but in many cases there are important confusions.

The vision and mission must be established for the GIAHS system and not for the organization or organizations that manage it.

Thus, this vision/mission of the system may coexist with the vision/mission of the entity that manages it. (This entity, as we have seen, may be specifically dedicated to the GIAHS site or manage a group of diverse territorial strategies).

Let us give an example: the **vision of a GIAHS site** could be to establish a space in environmental balance and with a prosperous economy, where a certain number of organic farms occupy a certain number of hectares. These characteristics will ensure the production of quality food, the maintenance of knowledge, agrobiodiversity, the landscape, and traditions — that is, the 5 FAO criteria. The **mission** would be (1) the promotion of organic agriculture, (2) the development of the value chain associated with direct product sales — in short channels — and (3) the promotion of responsible and sustainable local tourism. As can be seen, the mission (what we do) is aligned with the vision (what we want to be as a GIAHS site). This vision/mission will be shared by all the people and entities that make up the GIAHS site and will be communicated.

In this example, the GIAHS site is managed by a non-profit entity that coordinates the actions that make up the mission to achieve the vision. But the managing entity may have its own internal vision or mission as an organization, for example: the development of a solvent and professional organization for competent management of the GIAHS site — vision; for this, the system's management organization will be responsible for securing public and private funding for the development of the GIAHS site's actions — this would be the mission. It can be inferred, therefore, that although both visions/missions are related, the one for the GIAHS site and the one for the managing organization are independent. For example, the vision of the GIAHS site — an environmentally balanced space with a prosperous economy — may be achieved, while the vision of the organization managing the GIAHS site may fail, in the hypothetical case that it does not achieve economic stability.

Obviously, the generation of the vision and mission must be done through a participatory process. In fact, these are two aspects that should form the core of the communication of the GIAHS site to society. It is therefore recommended to use clear, concise concepts with communicative strength, even incorporating emotional aspects.

The mission and vision must be visible, published, and disseminated through digital (and non-digital) media so that they are shared.

One final point: the vision and mission must be consistent with the content of the candidature; that is, they must consider the characterization of the system's relevance, the five criteria, and the influence of climate change and socioeconomic pressures on the GIAHS site.

5.1.2.- Values of the APDC

There is another element of interest in strategic definition: values, in this case the values associated with the GIAHS site.

Values are the fundamental principles and ideas that form the basis of the culture of organizations, that is, of the system. They answer the questions: What is important to us? and How do we behave?

In this type of organization, values, work culture and ethics, and traditions are key to framing the mission — what we do — and achieving the vision — where we want to get to.

To a large extent, these values are transferred by the FAO program itself since a GIAHS site is considered a sustainable system that aims to continue being so. Therefore, the framework to consider is the seventeen Sustainable Development Goals (SDGs) of the United Nations 2030 Agenda — the FAO is, after all, a United Nations agency.



Therefore, the drafters of the Action Plan for Dynamic Conservation must select, from among the seventeen SDGs, those that are applicable. The following table can be used as a checklist.

ID	SDGs	Relationship with the GIAHS site (0/10)	Notes
1	No poverty.		
2	Zero hunger.		
3	Good health and well-being.		
4	Quality education.		
5	Gender equality.		
6	Clean water and sanitation.		
7	Affordable and clean energy.		
8	Decent work and economic growth.		
9	Industry, Innovation, and Infrastructure.		
10	Reduced Inequalities.		
11	Sustainable Cities and Communities.		
12	Responsible Consumption and Production.		
13	Climate Action.		
14	Life Below Water.		
15	Life on Land.		
16	Peace, Justice, and Strong Institutions.		
17	Partnerships for the Goals.		

Each selected SDG should be accompanied by an explanation of its impact and its relationship with the GIAHS site. More detailed information about the SDGs can be found on the United Nations portal: https://www.un.org/sustainabledevelopment/

5.2.- Identification of Public Policies and Strategies

Retrospective.

In the previous section, we established the foundation of the GIAHS site strategy: its mission, vision, and values. This section will develop a study of public resources (established as policies and strategies) that can be used to carry out the vision and mission. Other private resources will also be considered.

The next proposed step is the identification of public policies and strategies. Developing this chapter requires desk work and professionals with advanced knowledge of public

administration activities, whether from the organization or organizations coordinating the GIAHS site, or from subcontracted entities, generally dedicated to consultancy.

The proposed process for identifying public policies and strategies is as follows:

- First, identify the public institutions that impact the GIAHS site, from local governments to the European Union, including provincial, regional governments, public agencies, and national governments.
- Next, for each of these institutions, locate the departments that influence the GIAHS site activities, then identify the specific policies and supporting documents (plans, strategies, public calls, regulatory developments, etc.).
- It is advisable to compile these data into a database of institutions and documents.
- Likewise, it is recommended to prioritize them from greatest to least impact, to better understand the actions of public institutions within the system and facilitate their reference when necessary.

As will be seen, having this information is key since, quite possibly, the financing of many of the plan's actions will depend on these public departments and must be aligned with existing planning documents. For example, in the case of a European GIAHS site, an action to improve a cultural space within the GIAHS site could be funded through a call from a government's culture department or through a local development aid program (the second pillar of the Common Agricultural Policy – CAP).

Among the policies to consider will undoubtedly be agricultural policy, environmental policy, cultural policy (associated with local knowledge), business policy (especially in those GIAHS sites with significant focus on processing—such as crafts), and tourism policy.

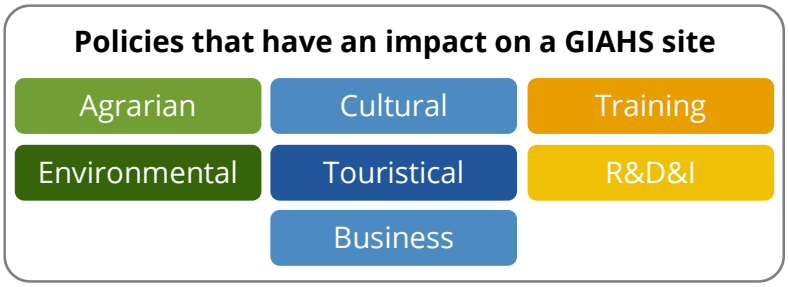
There are also a series of key transversal entities and policies crucial for the development and sustainability of GIAHS sites that should not be overlooked, even if their current impact may be limited. These include:

- Education and training (agricultural vocational training, universities). In many cases, the sustainability of a GIAHS site requires the capacity-building of the people involved. This includes technologies, marketing, tourism, regenerative agricultural practices, etc. Capacity building through training is an important element to consider. However, as mentioned earlier, the training of primary producers has its own dynamics derived from their characteristics, where it is more important to see and implement practical actions rather than just attend theoretical courses.

- R&D&I (Research centers, etc.). Innovation is part of the dynamic conservation of GIAHS sites and is a primary vector for adapting to the changing environment that surrounds them.

Finally, it is also relevant to conduct the same identification process for private entities involved in environmental, territorial, and agricultural development, as they can contribute financing and resources to the APDC activities.

The following scheme summarizes the policies and strategies to be considered.



The following matrix is a proposed organization of the content for this chapter. As can be seen in this matrix, public entities are interrelated with policies and the strategic documents for their implementation.

Documents of interest for raising public funds for GIAHS sites.							
Institutions / **Policies**	City hall	Commonwealth	Provincial government	Regional government	National government	European Union	FAO / ONU
Agricultural	Management of public agricultural spaces.	Management of public agricultural spaces.	Management of public agricultural spaces.	CAP Management	PEPAC	Farm-to-Fork Strategy	World Agricultural Heritage
Environmental				Protected Natural Areas	National Forest Strategy	Biodiversity Strategy	Biosphere Reserves
Cultural				Cultural promotion policy			
Business			Economic promotion programs.	Economic promotion programs.	Economic promotion programs.	Interreg. (project development)	
Touristic	Local tourism promotion		Provincial tourism promotion	Regional tourism promotion	National tourism promotion		
Education.				Vocational training. Universities			
I+D+I					National R&D&I Plan	Horizon 2020	

The matrix shows an example of implementation, not a specific result for any GIAHS site. The color of each square indicates the level of impact of the policy on the GIAHS site: darker means greater impact.

It is important that this study of existing public resources with potential impact on the GIAHS site is carried out before the analysis/diagnosis in the following section. This way, the participatory diagnostic work process does not have to wait for this study. Reducing the time of the participation process is key to keeping participants motivated and granting legitimacy to the APDC.

5.3.- Analysis

Retrospective
Having established, on one hand, the strategic foundation of the GIAHS site—mission, vision, and values—and, on the other hand, the available public resources (by policy and strategy areas) to carry out the Action Plan for Dynamic Conservation, the next step is to conduct a diagnosis of the current situation of the GIAHS site.

The diagnosis of the GIAHS site will be structured based on the eight factors proposed by FAO for the selection of candidacies. Logically, the maintenance of these factors is related to the retention of the GIAHS site status, and their sustainability is the ultimate goal of any Action Plan for Dynamic Conservation.

The analysis must be developed with the participation of the GIAHS site stakeholders, as will be shown below.

These eight factors to consider are divided into three groups. The first group is linked to **maintaining the global importance of the system**, that is:

- The global relevance of the GIAHS site as an agroecosystem. In many cases, the viability of these spaces is threatened by globalization and competition from technological, industrial systems or those based on economies of scale.
- The maintenance of the production of quality and differentiated goods and services from the GIAHS site. In many cases, the justification for the differentiated nature of the space is related to these agricultural products and services, generally food. Therefore, maintaining production and value generation is a key element.
- The last factor to consider is the general maintenance of the agricultural ecosystem as a whole. Systems can be vulnerable, as the breakdown of one

element can destabilize other linked elements. This factor thus has a holistic approach.

The second group of factors to analyze in this diagnosis coincides with the **five FAO GIAHS selection criteria**; again, the maintenance of these depends on the retention of the GIAHS site status.

These are:

- Food provision and food security.
- Agrobiodiversity.
- Local knowledge systems.
- Culture, values, and local organizations.
- Terrestrial or marine landscape.

(For more information about these five criteria, please consult the content on the FAO digital portal or earlier chapters of this guide.)

Finally, there are two **transversal factors** to diagnose, which are:

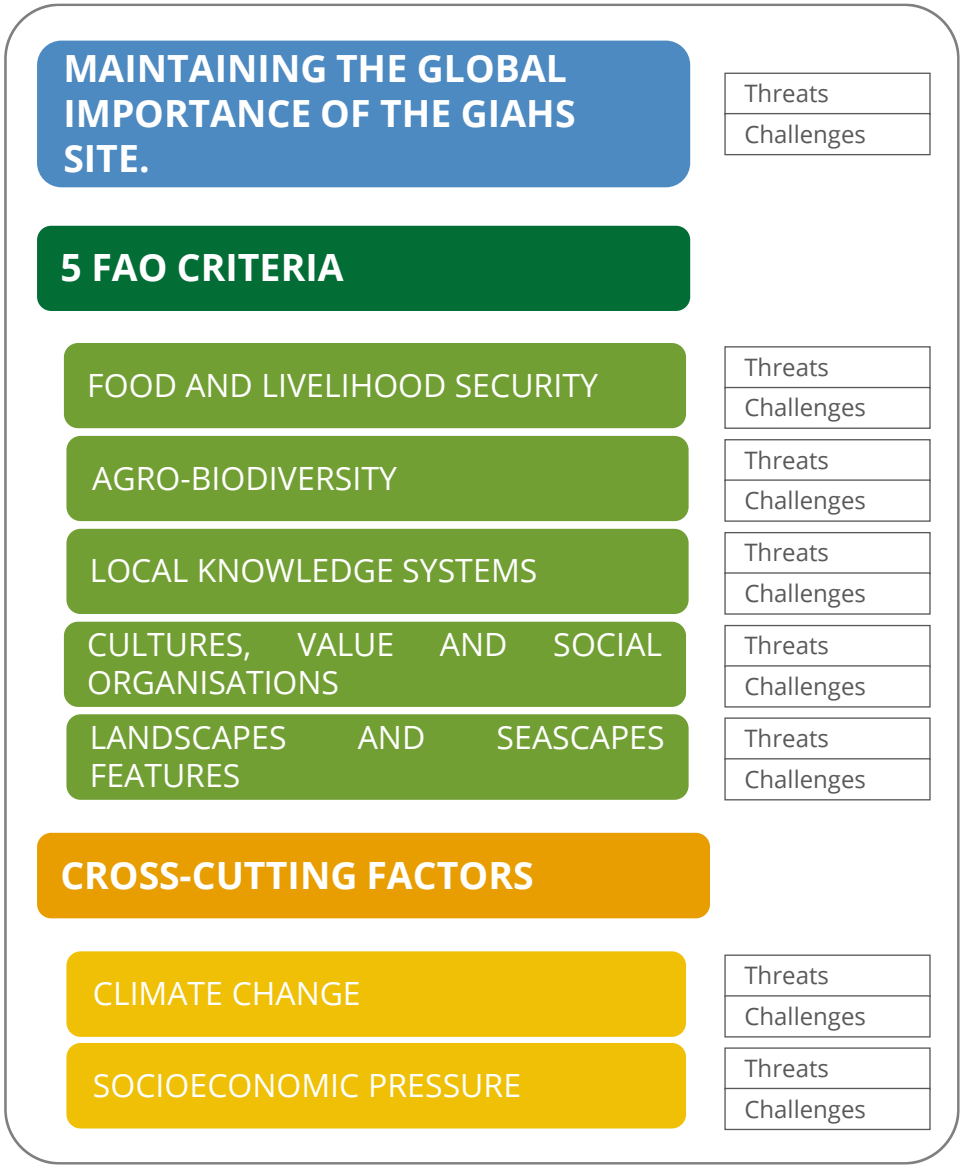
- The impact of climate change on the GIAHS site. The climate threat is one of the widespread destabilizing factors of these systems; hence the FAO considers it necessary to analyze it specifically.
- The impact of socioeconomic pressures linked to human activity. This is another specific factor threatening the continuity and sustainability of many GIAHS sites.

Based on these three groups of factors, it is recommended to develop a matrix of threats and challenges according to the following structure:

- One matrix for the first group of factors (global relevance, maintenance of the production of goods and services, and continuity of the agricultural ecosystem as a whole).
- One threats and challenges matrix for each of the five FAO GIAHS criteria. A total of 5 matrices.
- One matrix for each of the two general transversal factors: climate change and economic pressures. A total of two matrices.

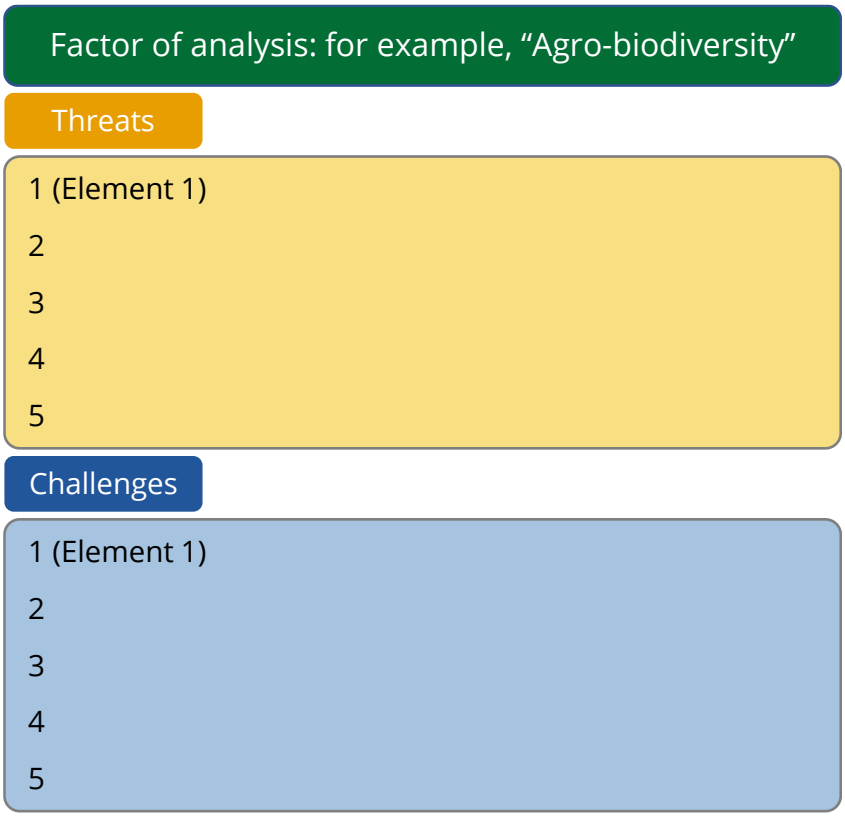
Working with these threat and challenge matrices specific to concrete factors allows the diagnosis to align with the FAO criteria, ensuring that all factors conditioning a GIAHS site are covered and enabling a comprehensive, analytical, and detailed overview of threats and challenges.

Thus, in total, for the diagnosis of the GIAHS site situation, it is recommended to develop eight matrices of challenges and opportunities, as shown in the following diagram.



As mentioned, and in accordance with FAO guidelines, a Threats and Challenges Matrix will be used for each analysis. In each matrix, it is recommended that each of the two aspects contain a maximum of five elements. These elements must be described succinctly and prioritized in ascending order; the objective is for the matrix to be understandable without requiring further reading. If a more detailed explanation of an element is necessary, this will be provided outside the matrix.

Below is a sample matrix that can be used.



For the development of these matrices, it is proposed to follow the following work process:

- **Selection of experts to consult**: For each of the eight matrices/factors that make up the analysis. This selection will include people from within the system and from the sector, providing an external perspective. For each factor, there could be five people in total — it is possible that some experts can contribute insights to several factors.
- **Initial matrices**: Work individually with each expert by organizing a round of structured interviews. This will require preparing a set of questions for each matrix. In these structured interviews, each expert will provide their five prioritized threats and five prioritized challenges (i.e., 5 threat elements and 5 challenge elements, 10 in total). It is important not to contaminate the interviews with cross-input, so that each expert’s perspective remains authentic in this phase.

  Based on the collected information, the eight matrices will be developed. For this, a point-based prioritization system will be used following this process: Each factor — threats or challenges — provided by each expert will be rated from 1 to 5 according to its priority (5 for highest priority, 1 for lowest priority). Next, a homogenization of the factors will be performed since each expert will have



defined them differently. Finally, the points for each factor are summed, and each of the eight threat and challenge matrices is constructed, which will then be subject to consultation through participation.

(A more in-depth approach can separate experts into internal — linked to the system, providing an internal perspective — and external — sectorial experts providing an external perspective. If this option is used, it is recommended to build two matrices for each of the eight factors, allowing the confrontation of internal and external views. This confrontation of divergent viewpoints can provide valuable knowledge for understanding local/global dynamics. These two viewpoints can be analyzed during the participation process.)

- **Preparation of a participatory process** open to the people who are part of the GIAHS site: In this process, it is important to consider the number of participants as well as ensuring the group represents all system interests (primary production, food chain, vulnerable groups, tourism sector, etc.).
- Creation of the **final factor matrices based on the participation** of the GIAHS site stakeholders: This participation will preferably take place in a single face-to-face session, involving the selected experts and other people not involved in the prior work.

  The workflow begins with the sharing of initial results: the preliminary matrices. If internal and external experts were consulted, divergences between these perspectives will be analyzed.

  This sharing will allow participants in the sessions to gain a comprehensive view of the analysis, improving their understanding of the system.

  Following this, a cooperation and consensus-building exercise will be conducted, resulting in the final prioritized matrices.

  This consensus process can be carried out following these steps, factor by factor, matrix by matrix:

  - Encourage initial dialogue on the preliminary results obtained from the experts.
  - Allow the inclusion of new elements into the initial matrices.
  - Evaluate both initial and new elements. Personal scoring of priorities for each matrix.
  - Development of the shared final matrices for each factor.

- Creation of the **general matrix of threats and challenges**. In this step, from the eight FAO factor matrices mentioned, a general threats and challenges matrix will be constructed that can be communicated to different stakeholders and used for effective management.

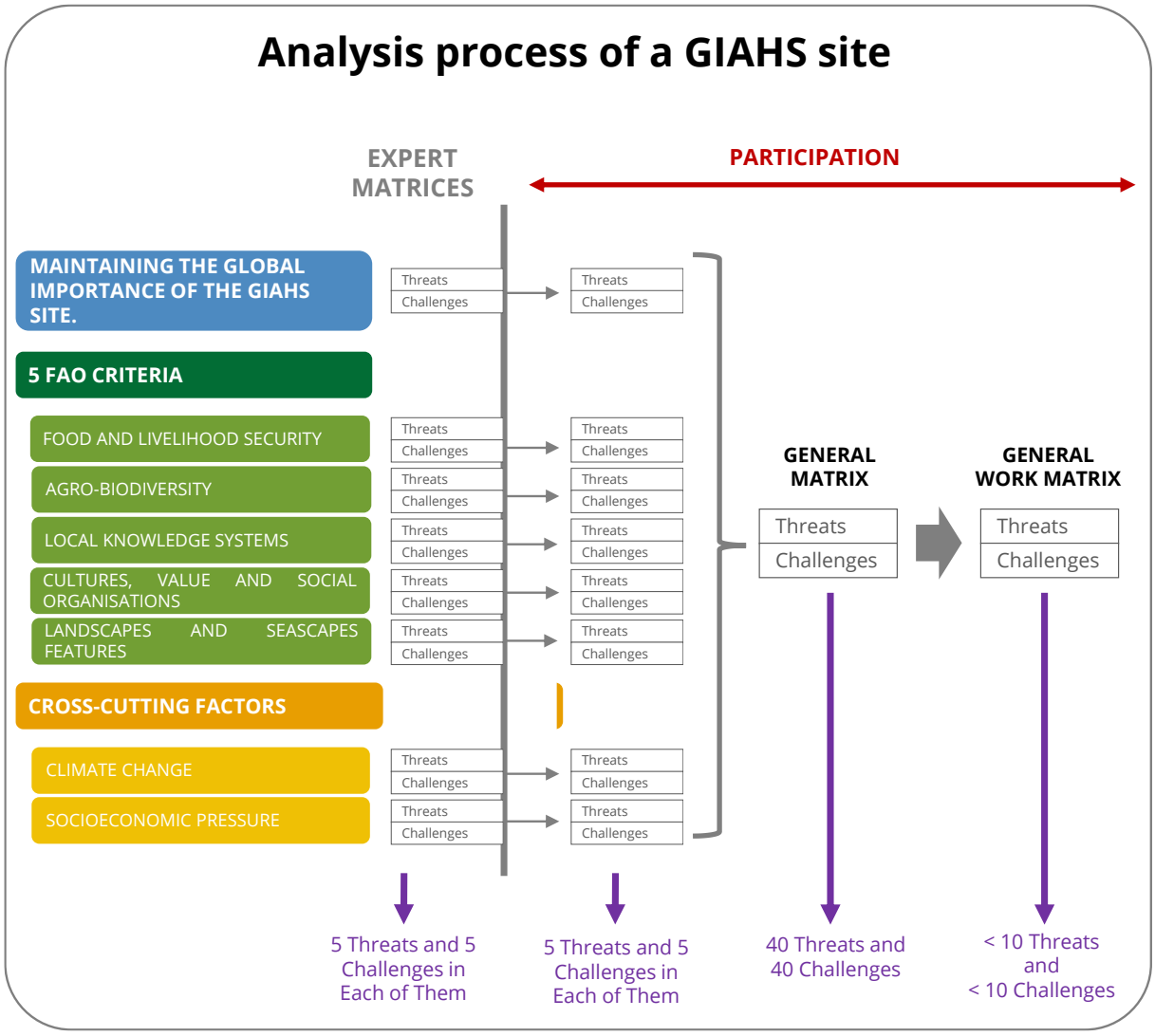
  Besides the impracticality of working with eight separate matrices, they lack an overall prioritization or order of their elements; each matrix functions independently without interrelation. For example, which would be more prioritized: elements related to landscape or those related to climate change? This will not be known until participants combine them into a single matrix.

  To address this, during the same participation process, a new prioritization will be carried out — conducted individually among all participants in the session(s) — that will include all elements from the eight matrices to obtain the **general matrix**.

  This matrix will contain all previously prioritized elements, perhaps 40 threats and 40 challenges.

  Since working with so many elements (threats and challenges) is complex, it is recommended to use a reduced working version with no more than 10 threats and 10 challenges. Naturally, those with the highest priority indices in the participation results. This is called the **general working matrix**.

The following diagram illustrates the process.



The outcome of this participatory process must be formalized in the subsequent desk work. This outcome can be sent to the group of experts and participants to obtain relevant feedback that, if applicable, verifies the General Working Matrix. At the end of this process, the participants will have aligned their viewpoints in a shared analysis.

The final result should be published and made accessible to all interested parties.

Naturally, to carry out this analysis or diagnosis, the working sessions with experts and participants must be facilitated by individuals with expertise and experience in participation processes.

The integration of participation (an inside or "bottom-up" perspective) and sectoral expert opinions (external perspective) is key to obtaining a consistent analysis. The use of the internal perspective helps characterize reality, but it is often insufficient in identifying opportunities and challenges, as these depend on global trends and the behavior of

people and entities that are mentally (urban-rural perspective) and geographically distant from the GIAHS site.

One of the difficulties in any diagnostic process is avoiding, as much as possible, the inclusion of "politically correct" specifications and "obvious truths" that detach the analysis from reality, which causes the outcome to lose quality and distances participants from the conclusions, undermining the legitimacy of the process.

The result of this analysis is a set of threat and challenge matrices that cover all important factors related to a GIAHS site, as well as a general matrix.

Below is a model of the **GENERAL MATRIX**:

FACTOR	**ELEMENT**		**PRIORITIZATION**
	THREATS	**CHALLENGES**	
Global importance of the system			
Global relevance.	1	1	
	2	2	
	3	3	
	4	4	
	5	5	

FACTOR	**ELEMENT**		**PRIORITIZATION**
	THREATS	**CHALLENGES**	
5 criteria.			
Food supply and food security.	1	1	
	2	2	
	3	3	
	4	4	
	5	5	
Agrobiodiversity.	1	1	
	2	2	
	3	3	
	4	4	
	5	5	
Local knowledge systems.	1	1	
	2	2	
	3	3	
	4	4	
	5	5	

Culture, values and local organizations.	1	1	
	2	2	
	3	3	
	4	4	
	5	5	
Landscape.	1	1	
	2	2	
	3	3	
	4	4	
	5	5	

FACTOR	**ELEMENT**		**PRIORITIZATION**
	THREATS	**CHALLENGES**	
Transverse.			
Impact of climate change	1	1	
	2	2	
	3	3	
	4	4	
	5	5	
Impact of socioeconomic pressures.	1	1	
	2	2	
	3	3	
	4	4	
	5	5	

The prioritization field will be a number resulting from the votes obtained during the participatory process.

The following template is specific to the **GENERAL WORKING MATRIX**:

THREATS (elements)	**FACTOR**		**PRIORITIZATION**
1	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
	Relevance		
	Food supply		

	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
3	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
4	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
5	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
6	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
7	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		

	Socioeconomic pressures		
8	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
9	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
10	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		

CHALLENGES (elements)	FACTOR		PRIORITIZATION
1	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
2	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
	Relevance		

3	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
4	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
5	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
6	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
7	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
8	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		

	Climate change		
	Socioeconomic pressures		
9	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		
10	Relevance		
	Food supply		
	Agrobiodiversity		
	Knowledge systems		
	Culture and values		
	Landscape		
	Climate change		
	Socioeconomic pressures		

5.4.- Alignment of the analysis/diagnosis and public policies and strategies

Retrospective.

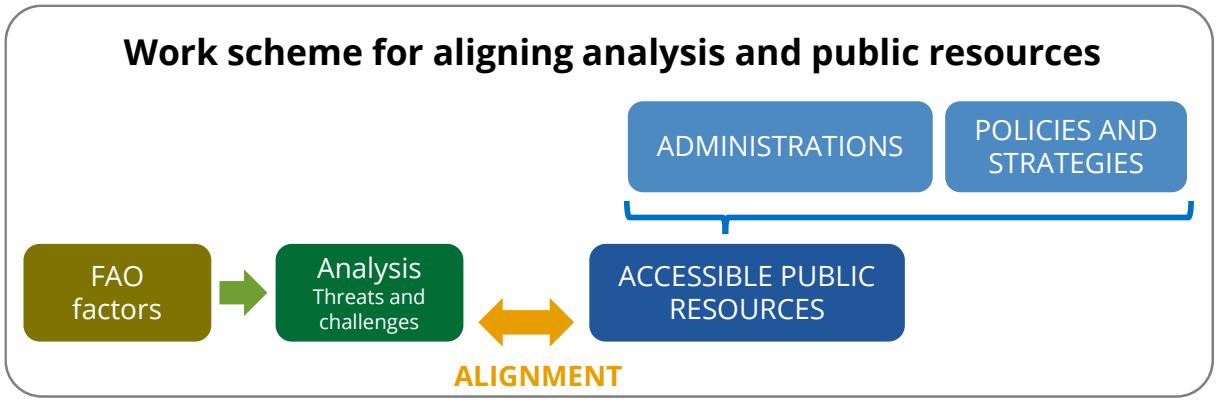
After establishing (1) the strategic foundation of the GIAHS site: mission, vision, and values, (2) the available public resources (by policy and strategy areas) to incorporate into the Action Plan for Dynamic Conservation, and (3) a comprehensive diagnosis of the GIAHS site situation; the next step (4) is to determine the relationships between the elements of the threat and challenge matrices and the aforementioned public resources.

The development of the Action Plan for Dynamic Conservation conceptually consists of acting on the aspects identified in the threat and challenge matrices by proposing concrete actions.

In general terms, these actions will require public resources, although it is possible that some of them may incorporate resources from civil society (non-profit organizations, philanthropic entities, or Corporate Social Responsibility). It is also possible to rely on the local community and/or the business sector for certain actions that do not require significant financial capacities.

The objective of this section is to link or align the analysis or diagnosis with the accessible resources—characterized in section 5.2 of this guide. Since the diagnosis has been

structured following the FAO's GIAHS factors, this process will connect the available resources to those factors, as illustrated in the following figure.



This desk work must be carried out by a team of people with sufficient technical capacities. The recommended process to follow is:

1. Identification of the highest priority element identified in the general working matrix, whether it is a threat or a challenge.
2. Identification of the public (and private, as previously explained) policies and strategies that allow for mitigation, correction (in the case of threats), or leverage (in the case of challenges) of the selected element.
3. Based on these policies and strategies, a **proposed action** for the element is developed, consistent with them. This action will require a detailed study of the public policies and strategies and the experience of the professional team responsible for the APDC.
4. The cycle continues by selecting the next priority aspect.

It is important to provide a clear description of how the **proposed action** is formed. The goal of the proposed action is to determine to what extent the available resources (primarily public, but not exclusively) allow responding to each of the priority elements of the GIAHS site, whether threats or challenges.

To do this, it is necessary to evaluate what types of actions and resources are required to address each of the priority elements of the general working matrix, as well as to determine if these identified actions and resources are feasible within the frameworks of the existing public policies and strategies for each element (for example, in public aid calls, the Common Agricultural Policy, training programs, or various types of public interventions). Therefore, it is an evaluation of the feasibility for the GIAHS site to face the future, that is, to confront each of the pressing threats and challenges identified in the general working matrix with the existing institutional situation.

Knowing this starting point is crucial for many reasons:

- To understand what impact the GIAHS designation and the implementation of the APDC may have on the system's reality, thus avoiding the creation of unattainable expectations within the local community.
- To prevent social demotivation caused by collective projects whose expectations cannot be met. It is not honest to initiate social processes without an ex-ante feasibility evaluation.
- To provide a critical vision of the APDC's scope for the organizations and decision-makers, especially public institutions.

This evaluation cannot be done with precision since the information available (planning documents, strategies, calls, etc.) is not quantitative and its availability depends on numerous contingencies (for example, the ability of the GIAHS site organization to secure funding). However, it is possible to rigorously determine whether the accessible resources potentially sufficiently cover the proposed actions.

One option is to use traffic light labels to determine the feasibility of each element, where:

- Red indicates that it is not feasible to meet the needs of an element with the current formulations of public policies and strategies.
- Yellow indicates that it is possible to partially meet the requirements of the element.
- Green indicates that it is feasible to develop the needs of each element.

This way, at a glance, those responsible for drafting the plan and the people involved in the system can evaluate the potential offered by the homologation as a GIAHS site of an agroecosystem.

It may be useful to present this traffic light scheme in the participatory process to make the development process more transparent, which is one of the important values in building a GIAHS site.

MATCHING TABLE PRIORITY ELEMENTS OF THE GENERAL WORK MATRIX AND PUBLIC POTENTIAL.

THREAT OR CHALLENGE. Element	GIAHS FACTOR	RELATED PUBLIC POLICIES OR STRATEGIES	NOTES	LABEL		
1 (In order of priority)						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

This table provides a quick overview of the potential impact of the GIAHS site on the activity, based on the tags.

It is possible that public policies and strategies may change, rendering the alignment of threats and challenges with them obsolete; however, such changes in public policies are generally slow and usually stem from strategic shifts that can be incorporated into this evaluation process.

5.5.- Objetives.

Retrospective
After establishing (1) the strategic foundation of the GIAHS site: mission, vision, and values; (2) the available public resources (by policy and strategy areas); (3) diagnosing the situation of the GIAHS site based on the eight factors mentioned; and (4) aligning the diagnosis with existing public policies and strategies, evaluating their potential—under current circumstances—to address the elements of the various factors, the next step is to set objectives for the APDC.

Before starting the process of setting objectives, it is important to clearly differentiate the vision of the GIAHS site from the objectives of the APDC.

- The vision is a broad collective goal that is expected to be achieved over an undetermined timeframe — medium to long term. It is the result of reflection and social consensus among the interest groups of the GIAHS site. In other words, achieving the vision is the most important work.
- The objective of the APDC will be concrete and must be achievable within a five-year time horizon (subject to annual review), as indicated in section 4.5.

However, the APDC objective can be seen as a stepping stone toward achieving the vision of the GIAHS site. It is crucial to understand that the APDC objectives must be fully aligned with the vision.

For example: the vision of a GIAHS site could be a sustainable agroecosystem (environmentally, economically, and socially). This would be the vision of the interest groups. The APDC objective might be the implementation of agroecological practices on 80% of the agricultural holdings in the GIAHS site over the next 5 years. As seen, both are linked: the APDC objective develops the vision, contributing to its fulfillment.

The vision is usually broader than the APDC objectives, so in many cases, meeting the objectives does not guarantee achieving the vision.

In this way, the APDC objectives represent a technical, achievable goal that can be carried out by a professional organization with the resources available.

It is proposed that the objectives of the Action Plan for Dynamic Conservation follow the classic structure:

- One general objective.
- Several specific objectives.

5.4.1.- General objective.

The general objective of the plan will be to move closer to the vision developed over the plan's duration (set at 5 years), using the resources available to address the identified threats and challenges.

It is important that the objective clearly states who the beneficiaries are and what will be done for them.

The general objective should be a brief and motivating statement.

5.4.2.- Specific objectives.

The objectives of the APDC will be established following the same sections as the analysis of the 8 factors, which are:

Maintenance of the global importance of the system:

- Global relevance of the GIAHS site as an agroecosystem.
- Maintenance of the production of quality and differentiated goods and services from the GIAHS site.
- General maintenance of the agrarian ecosystem.

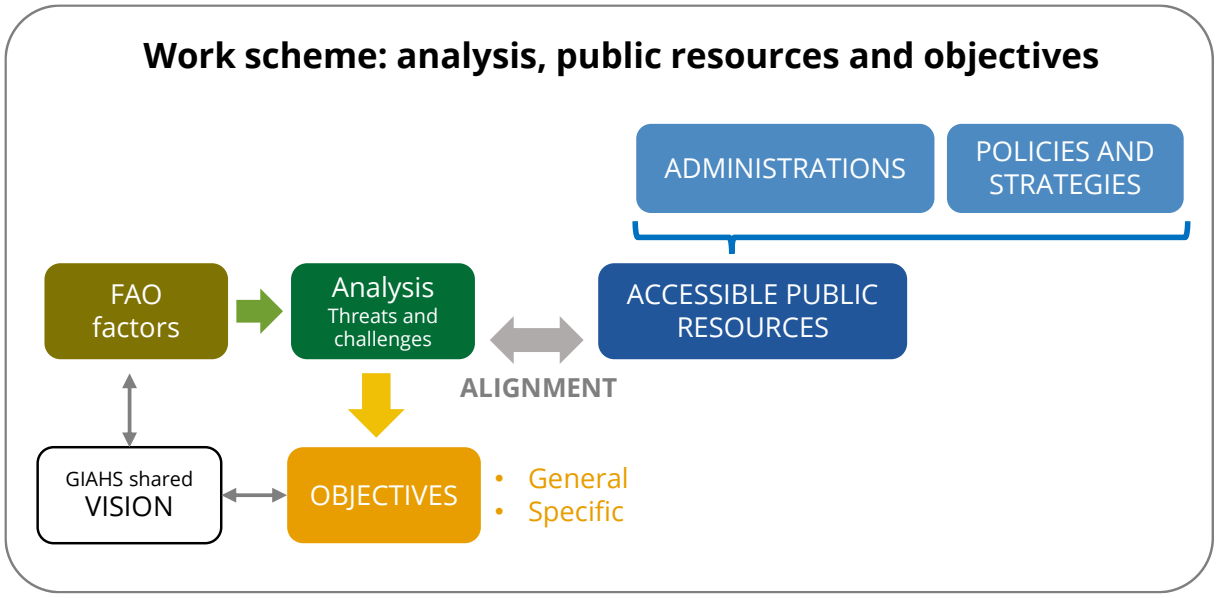
Objectives related to the five GIAHS selection criteria:

- Provision of food and food security.
- Agrobiodiversity.
- Local knowledge systems.
- Culture, values, and local organizations.
- Terrestrial or marine landscape.

Cross-cutting objectives:

- Mitigation of the impact of climate change.
- Mitigation of the impact of socioeconomic pressures.

Maintaining consistency between the diagnosis and the specific objectives allows for a more organized formulation of the Action Plan for Dynamic Conservation, as shown in the diagram below, providing simplicity in action—which is one of the values established in chapter 4.5—and more consistent communication.



For the sake of the APDC's effectiveness, the development of specific objectives must be carried out following a SMART methodology, as described below:

SMART Objectives.

SMART is a methodology for defining objectives or actions so that they can be managed effectively. To achieve this, an objective or action must meet the following criteria—corresponding to the initials of the word SMART:

- **Specific**: Clearly described, indicating the achievement to be accomplished.
- **Measurable**: The achievement can be quantified using indicators.
- **Achievable**: The objective or action must be realistic and possible to accomplish given the available resources and starting point.
- **Relevant**: The objectives must be aligned with the goals, in this case, the vision of the GIAHS site.
- **Time-bound:** A timeframe must be established, in this case, the duration of the APDC.

Meeting these criteria for each objective set will provide the APDC with a realistic management framework.

Objectives must be consistent with the alignment of the factors and elements from the analysis and the public resources (policies and strategies impacting the GIAHS site), so that the specific objectives most related to the green tags (those factors where accessible resources can satisfactorily mitigate threats or develop opportunities) will generally be the most ambitious and, therefore, the highest priority.

From a technical perspective, specific objectives should be described in a way that makes them achievable with the available resources and within the stipulated timeframe.

The level of impact will depend on the color of the tags assigned to the elements of each factor. It is possible that some objectives, even if achieved, will not significantly impact the element or the factor it belongs to, thus not producing a notable improvement in the diagnosis. This is the case with objectives linked to elements/factors with red tags. Achieving objectives without improvement may generate frustration and discredit the APDC and the organization(s) managing it. Therefore, it should be communicated that some threats and challenges cannot be addressed with the current resource situation.

This is the basic working matrix for formulating the objectives:

FACTOR	SPECIFIC OBJECTIVE	INDICATORS	SOURCES OF VERIFICATION
Global importance of the system			
Global relevance.			

FACTOR	SPECIFIC OBJECTIVE	INDICATORS	SOURCES OF VERIFICATION
5 criteria.			
Food supply and food security.			
Agrobiodiversity.			
Local knowledge systems.			
Culture, values and local organizations.			
Landscape.			

FACTOR	SPECIFIC OBJECTIVE	INDICATORS	SOURCES OF VERIFICATION
Transverse.			
Impact of climate change			

Impacto de las presiones socioeconómicos.			

Let us remember that the objectives must:

- Be aligned with the vision and the mission.
- Be aligned with the institutional framework.
- Respond to the priority threats and opportunities, addressing the threats and leveraging the opportunities.

Objectives related to elements with green tags should be prioritized, as they will produce a real impact.

5.6.- Impact indicators.

Here's the translation of the quote:

"What gets measured gets managed.

What gets managed gets improved."

— *Peter F. Drucker*

Retrospective

Up to this chapter, the following have been established:

(1) the strategic basis of the GIAHS site: mission, vision, and values;

(2) the available public resources (by policy and strategy areas) to incorporate into the Action Plan for Dynamic Conservation (APDC); (3) an analysis/diagnosis of the GIAHS site situation, according to the 8 FAO factors; (4) the alignment of resources with the diagnosis to assess the development potential of the GIAHS site; (5) the APDC objectives, both general and specific.

The next task is to develop impact indicators that measure progress toward the established objectives.

Measuring the progress of executed actions towards the objectives is a necessary practice in all planning processes.

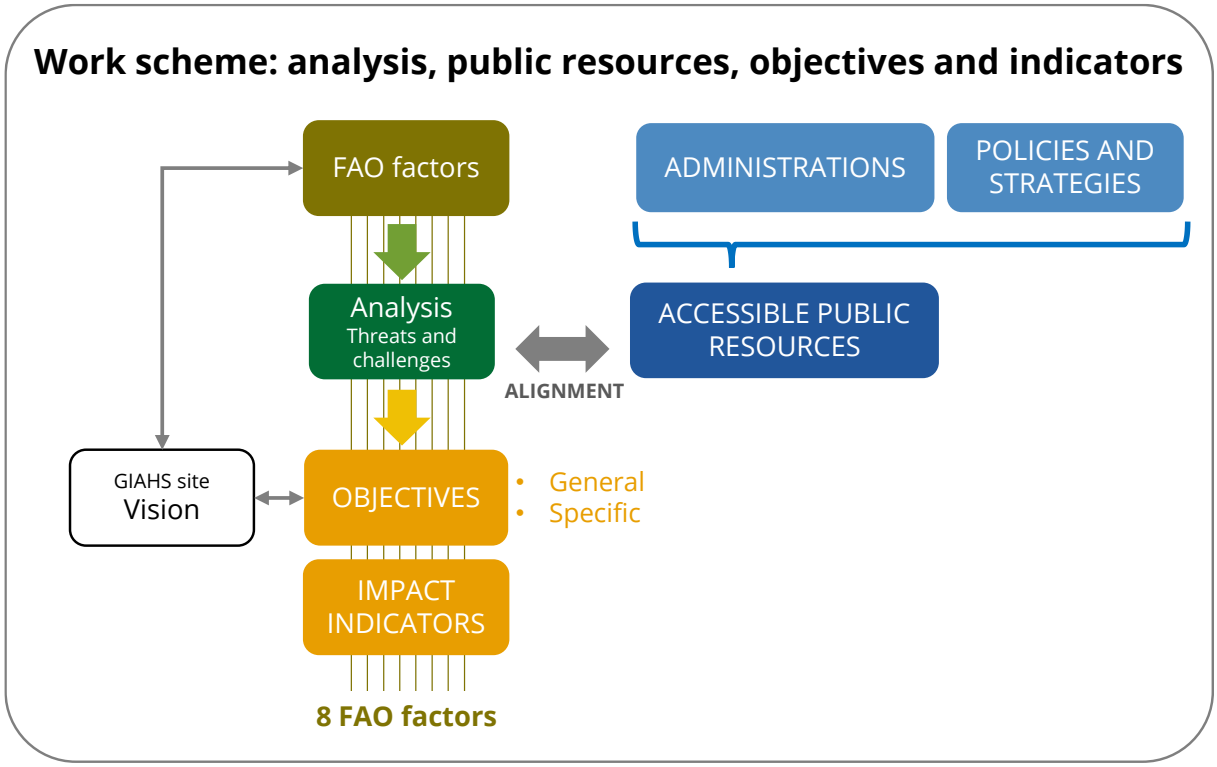
Therefore, for each specific objective, it is proposed to identify a series of indicators that show this progress.

There are a set of rules that these indicators must comply with, such as:

- The fewer indicators per objective, the better. It is recommended not to exceed three indicators per objective.
- Indicators must be accessible through a reliable source of verification that provides data for the working period (many statistical indicators offer data with years of delay, so they are not operational).
- Indicators should at least assess performance during the 5-year duration of the APDC.
- For each indicator, an initial value and a final value will be established. When possible, annual data should be set.
- Given the simplification strategy developed, the indicators, in addition to corresponding to the objectives, will respond to the eight identified factors, improving the understanding of the GIAHS site management.

The indicators and sources of verification will be completed in the objectives matrix shown in the previous section. If possible, it is useful to convert these tables into a dashboard to allow for management monitoring.

This is the model for indicator development.



5.7.- Strategic lines.

Retrospective

Up to this chapter, the following has been established: (1) the strategic foundation of the GIAHS site, including its mission, vision, and values; (2) the public resources available (by policy areas and strategies) to be incorporated into the Action Plan for Dynamic Conservation; (3) an analysis/diagnosis of the GIAHS site's situation, according to the factors indicated by the FAO; (4) the alignment of resources with the diagnosis to assess the development potential of the GIAHS site; (5) the general and specific objectives of the APDC; and (6) a set of indicators to measure impact.

The next step is the development of the strategic lines that will group the actions to be carried out. The ultimate goal of the strategic lines (and of the actions) is to improve the impact indicators established in the previous point.

There are two logical ways to establish the strategic lines of the Action Plan for Dynamic Conservation of a GIAHS site, each with its own advantages and disadvantages:

- The first is to define strategic lines of action following the factors of the analysis, the objectives, and the indicators.
- The second is to define the strategic lines according to sectoral policies, such as agriculture, rural areas, environment, tourism, business, education and training, R&D&I, etc.

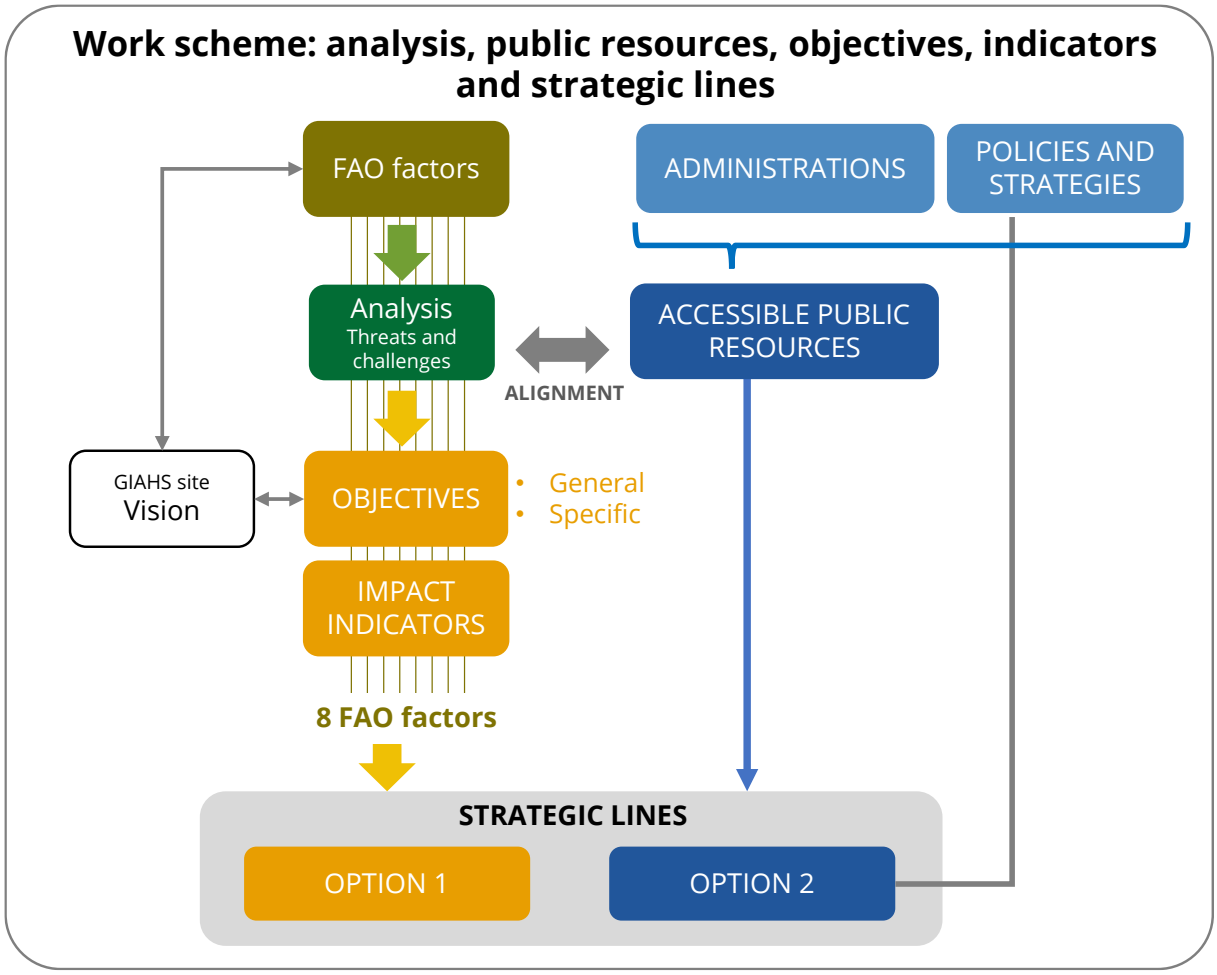
The first option allows the APDC to have greater consistency — the strategic lines are based on the same factors as the analysis, the objectives, and the indicators — and therefore it is simpler and easier to communicate. Each of the criteria or factors has an analysis, established objectives, indicators, and strategic lines.

In other words, the APDC can be almost divided into eight small work plans, one for each factor, which also facilitates specialized and effective participation and debate.

The second option — organizing the work by sectoral policies — facilitates the relationship with public administrations, which will provide a significant part of the resources, as it allows for the specialization of the plan's managers by area and the establishment of more tangible commitments with the mentioned administrations.

This option is more complex, as it creates diverse relationships between the strategic lines and the objectives. A strategic line may be related to several objectives, but at the same time it can be more effective.

Thus, the entity responsible for managing the GIAHS site must choose between these two options. The following illustration shows this dual possibility.



The matrices for each of the options for the strategic lines have been designed:

OPTION 1. Strategic lines associated with the GIAHS factors.

FACTOR	SPECIFIC OBJ.	INDICAT.	STRATEGICS LINES	POLICIES	
Global importance of the system					
Global relevance			1 2 3	AGRICULTURAL	
				ENVIRONMENTAL	
				CULTURAL	
				TOURISM	
				BUSINESS	
				TRAINING	

				R&D	
Maintaining the production of goods and services			1 2 3	AGRICULTURAL	
				ENVIRONMENTAL	
				CULTURAL	
				TOURISM	
				BUSINESS	
				TRAINING	
				R&D	
General maintenance of the agricultural ecosystem			1 2 3	AGRICULTURAL	
				ENVIRONMENTAL	
				CULTURAL	
				TOURISM	
				BUSINESS	
				TRAINING	
				R&D	

FACTOR	SPECIFIC OBJ.	INDICAT.	STRATEGICS LINES	POLICIES	
Cinco criterios.					
Food supply and food security.			1 2 3	AGRICULTURAL	
				ENVIRONMENTAL	
				CULTURAL	
				TOURISM	
				BUSINESS	
				TRAINING	
				R&D	
Agrobiodiversity.			1 2 3	AGRICULTURAL	
				ENVIRONMENTAL	
				CULTURAL	
				TOURISM	
				BUSINESS	
				TRAINING	
				R&D	
Local knowledge systems.			1 2 3	AGRICULTURAL	
				ENVIRONMENTAL	
				CULTURAL	
				TOURISM	
				BUSINESS	
				TRAINING	
				R&D	
Culture, values and local organizations.			1 2 3	AGRICULTURAL	
				ENVIRONMENTAL	
				CULTURAL	
				TOURISM	
				BUSINESS	
				TRAINING	
				R&D	
Landscape.			1 2 3	AGRICULTURAL	
				ENVIRONMENTAL	
				CULTURAL	
				TOURISM	
				BUSINESS	
				TRAINING	
				R&D	

FACTOR	SPECIFIC OBJ.	INDICAT.	STRATEGICS LINES	POLICIES	
Transversales					
Impact of climate change			1 2 3	AGRICULTURAL	
				ENVIRONMENTAL	
				CULTURAL	
				TOURISM	
				BUSINESS	
				TRAINING	
				R&D	
Impact of socioeconomic pressures			1 2 3	AGRICULTURAL	
				ENVIRONMENTAL	
				CULTURAL	
				TOURISM	
				BUSINESS	
				TRAINING	
				R&D	

OPTION 2. Strategic lines associated with sectoral policies.

FACTOR	SPECIFIC OBJ.	INDICAT.	STRATEGICS LINES	POLICIES	
AGRICULTURAL			1 2 3	GLOBAL IMPORTANCE	
				FOOD SUPPLY	
				AGROBIODIVERSITY	
				LOCAL KNOWLEDGE	
				CULTURE, VALUES, ETC.	
				LANDSCAPE	
				CLIMATE CHANGE	
				SOCIOECONOMIC PRESSURE	
ENVIRONMENTAL			1 2 3	GLOBAL IMPORTANCE	
				FOOD SUPPLY	
				AGROBIODIVERSITY	
				LOCAL KNOWLEDGE	
				CULTURE, VALUES, ETC.	
				LANDSCAPE	
				CLIMATE CHANGE	
				SOCIOECONOMIC PRESSURE	
CULTURAL			1 2 3	GLOBAL IMPORTANCE	
				FOOD SUPPLY	
				AGROBIODIVERSITY	
				LOCAL KNOWLEDGE	
				CULTURE, VALUES, ETC.	
				LANDSCAPE	
				CLIMATE CHANGE	
				SOCIOECONOMIC PRESSURE	
TOURISM			1	GLOBAL IMPORTANCE	
				FOOD SUPPLY	
				AGROBIODIVERSITY	

			2 3	LOCAL KNOWLEDGE	
				CULTURE, VALUES, ETC.	
				LANDSCAPE	
				CLIMATE CHANGE	
				SOCIOECONOMIC PRESSURE	
BUSINESS			1 2 3	GLOBAL IMPORTANCE	
				FOOD SUPPLY	
				AGROBIODIVERSITY	
				LOCAL KNOWLEDGE	
				CULTURE, VALUES, ETC.	
				LANDSCAPE	
				CLIMATE CHANGE	
				SOCIOECONOMIC PRESSURE	
TRAINING			1 2 3	GLOBAL IMPORTANCE	
				FOOD SUPPLY	
				AGROBIODIVERSITY	
				LOCAL KNOWLEDGE	
				CULTURE, VALUES, ETC.	
				LANDSCAPE	
				CLIMATE CHANGE	
				SOCIOECONOMIC PRESSURE	
R&D			1 2 3	GLOBAL IMPORTANCE	
				FOOD SUPPLY	
				AGROBIODIVERSITY	
				LOCAL KNOWLEDGE	
				CULTURE, VALUES, ETC.	
				LANDSCAPE	
				CLIMATE CHANGE	
				SOCIOECONOMIC PRESSURE	

5.8.- Actions.

Retrospective

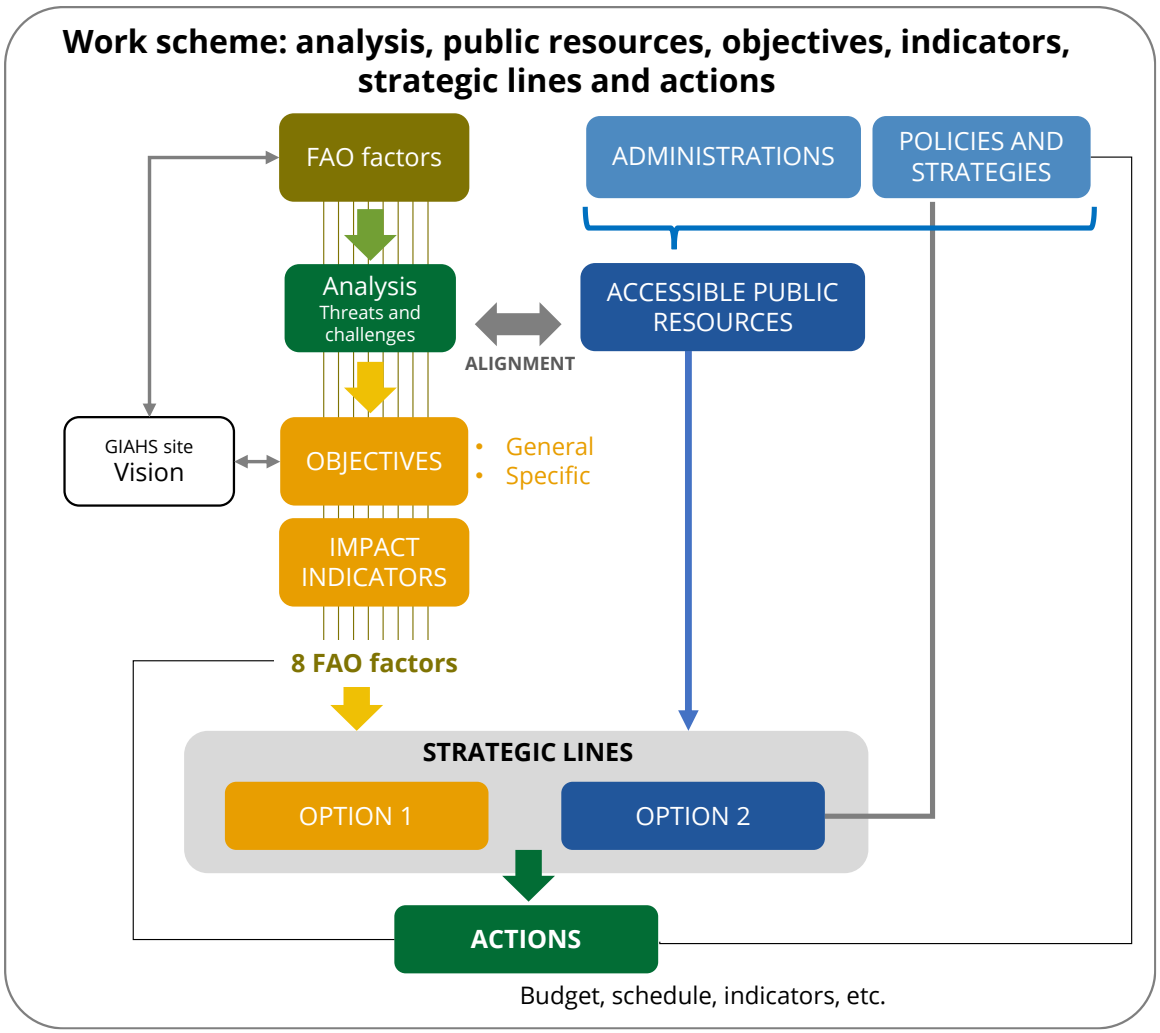
Up to this chapter, the following has been established: (1) the strategic foundation of the GIAHS site, including its mission, vision, and values; (2) the public resources available (by policy areas and strategies) to be incorporated into the Action Plan for Dynamic Conservation; (3) an analysis/diagnosis of the GIAHS site's situation, according to the factors indicated by the FAO; (4) the alignment of resources with the diagnosis to assess the development potential of the GIAHS site; (5) the general and specific objectives of the APDC; (6) a set of impact indicators; and (7) a formulation of the strategic lines.

This chapter will develop the structure of the actions that make up the strategic lines.

Actions are the basic unit of work in any plan. The purpose of this chapter is to develop a basic structure that allows, for each action:

- Its placement within a specific strategic line.
- Its alignment with the objectives, the analysis, and the accessible public policies and strategies.
- Proper characterization.
- Determination of the resources required for its implementation.
- Identification of the entities responsible for its execution.
- Monitoring of implementation through execution indicators.
- Evaluation of results.

The following illustration shows the operational framework of the chapter on action development.



This is a proposed action sheet.

Action name.	ACTION 1.	
Strategic line		
Detailed description of the action	Objectives.	
	Detailed description.	
	Work process.	
Responsible entity		
Related entities	Entity 1	Work to be done
	Entity 1	
	Entity 3	
	Entity 4	
	Entity 5	
Funding entities		
Budget	00,00 €	
Monitoring indicators	Stock Tracking Indicators (SMART). It is recommended to use one or two indicators per stock.	
Verification sources	Simple and temporarily viable sources of verification.	
Verification entity	Possibility of external control of execution.	
Execution schedule	Schedule according to the time scope of the APDC.	

The following table presents a contextualization of the actions in relation to the factors, objectives, and strategic lines.

FAO Factors		Specific Objective	Strategic Line	Action	Sectoral Policies	
GLOBAL IMPORTANCE					AGRICULTURAL	
FOOD SUPPLY					ENVIRONMENTAL	
AGROBIODIVERSITY					CULTURAL	
LOCAL KNOWLEDGE					TOURISM	
CULTURE, VALUES, ETC.					BUSINESS	
LANDSCAPE					TRAINING	
CLIMATE CHANGE					R&D	
SOCIOECONOMIC PRESSURE						

Based on this information, it is possible to generate reports by factor, by objective, by strategic line, by indicators, and by sectoral policies. For example, which actions are related to a sectoral policy, which strategic lines are linked to one of the 8 FAO factors, or which actions are integrated into each objective. It will also be possible to carry out budget evaluations by sectoral policies, factors, or objectives.

5.8.1.- Reference examples of some actions that can be included in the APDC.

Measures for maintenance and improvement of the production system, linked to agricultural policies:

- Advisory services for producers to ensure the sustainability of their farms.
- Development of agroecology and regenerative agriculture.
- Technical training for producers.
- Financial support for producers (for example, specific aids under the second pillar of the European CAP – in the case of Portugal – GIAHS site Barroso – or Spain – GIAHS site Uva Pasa).
- Projects and support to improve the marketing of the unique products of the GIAHS site.
- Incorporation of sustainable technologies and digitalization for livestock, agriculture, forestry, and/or fishing in GIAHS sites.
- Development of common services to maintain the sustainability of the GIAHS site (purchasing and marketing centers, cooperatives, etc.).

Measures for the conservation and transmission of agricultural heritage. Agricultural, tourism, and cultural policies:

- Development of museum activities.
- Promotion of the importance of the GIAHS site and tourism promotion.
- Digital portals and media for the dissemination of agricultural heritage.
- Awareness-raising and outreach within the GIAHS site.
- Documentation and research programs.
- Heritage conservation.
- Consolidation of a sustainable tourism network.
- Alignment of tourism businesses with the GIAHS site.

- Cultural events.
- Support for the cultural sector linked to GIAHS sites.
- Enhancement of the GIAHS designation.
- Etc.

Measures for training and research. Training and R&D&I policies:

- Studies on training needs.
- Training actions for capacity building in knowledge related to the GIAHS initiative.
- Development of university research related to the system.
- Research and documentation about the GIAHS site.

Measures for environmental sustainability. Environmental policy:

- Protection of the system's landscape.
- Adaptation to climate change.
- Programs to enhance ecosystem services.
- Responsible water management.
- Protection of native varieties – germplasm banks.

Measures to strengthen the management of the GIAHS site:

- Development and consolidation of coordinating entities.
- Training for technical staff.
- Capacity building of local associations and entities.
- Knowledge transfer measures among GIAHS sites.

With the development of the actions, the formulation of the strategy is complete**.**

6.- Management and execution.

"Vision without execution is hallucination." — Thomas Edison.

Although the management and execution of the Action Plan for Dynamic Conservation (APDC) is the key element to ensure the sustainability of these systems, this aspect goes beyond the scope of this guide, which focuses on the drafting of the APDC.

However, there are elements worth mentioning that would guarantee the success of the work to be done, including:

- The execution of the plan must be carried out without abandoning the importance of social participation. The FAO's formulation intends for the local community linked to the GIAHS site to always be the main protagonist of the actions.
- The APDC must have margins of flexibility to adapt to aspects not considered during the plan's preparation. Sanctifying the plan is not good practice when dealing with dynamic systems; in fact, it is very likely that some priorities will change during the 5-year duration of the plan.
- Two aspects must not be overlooked during execution: the shared vision and the consideration of primary producers as the key group of the GIAHS site. If the actions lack traceability in these matters, it is advisable to consider modifying the APDC.
- The plan must be honest and transparent with the territory in budgetary terms, indicating specific available funds and their use. It is important that the managing entity of the plan has sufficient independence to consistently show the results of the actions.

At the extreme, committing to a GIAHS site without dedicated resources will not bring medium-term benefits for the local community nor credibility for public authorities.

- In all development projects, it is crucial to have professional teams capable of taking on the collective challenge; in this case, the challenge of the dynamic conservation of a GIAHS site.

7.- Evaluation and consolidation of results.

The APDCs, like any other strategy or plan, must be continuously evaluated with the aim of keeping the actions and their results aligned with the development of the vision and the established objectives.

The evaluation of a plan has the following objectives:

- To assess the actions carried out and how they have helped us move closer to the vision (effectiveness) — especially in the five-year evaluation — and to the objectives — in the annual evaluation — (efficiency).
- To enable learning from the work done by the involved entities (stakeholders), so that in the next formulation of the APDC, the actions will be more precise and operational, allowing for the consolidation of the measures.

The opposite of evaluation and consolidation of results for a plan — in this case, the Action Plan for Dynamic Conservation — is to restart the work from scratch every time a new APDC for the GIAHS site is developed, which significantly limits the effectiveness of governance.

In general, it is recommended that the evaluation be carried out by an external professional team, in line with the latest trends in public resource oversight, which are predominant in most GIAHS sites.

These are some of the elements that should guide the evaluations of the plan and be reflected in a report.

Annual evaluation:

- Construction of a monitoring framework with execution indicators.
- Preparation of an annual results report based on the execution indicators of the actions, indicating the accuracy in the implementation of the planned activities — timely and appropriately.
- Performance evaluation and sharing in a session with participation from all stakeholder groups.
- Decision-making based on the evaluation, potentially leading to modifications of the APDC if there are significant discrepancies.

Five-year evaluation:

- Evaluation of the impact indicators related to the objectives — the extent to which they have been achieved.
- Qualitative assessment of the steps taken to reach the vision.
- Analysis of general available statistical data to compare progress based on objective, broad data.
- Evaluation of the 5 FAO criteria and other factors to ensure the maintenance of the system's characteristics that grant the GIAHS designation.
- Assessment of the relevance of the actions and their results.

It is recommended that the results of each evaluation be presented in specific **participatory sessions**, during which proposals to improve the APDC are discussed.

8.- Cooperation networks.

The lessons learned from assessments must be complemented by learning from practices developed at other GIAHS sites; in this sense, the adoption of tools like this guide would facilitate the transfer of results.

Establishing consistent cooperation networks that contribute to the effectiveness of the APDCs is key to improving the dynamic conservation of GIAHS sites.

Obviously, this is not the subject of this guide, although it is an essential element and it is worth mentioning it as part of a comprehensive overview of GIAHS sites.


Junta
de Andalucía
Consejería de Agricultura,
Pesca, Agua y Desarrollo Rural