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# Learning Area Sítio de Monfurado “Action Plan”

for brokerage activities on  
High Nature Value Innovation Projects



From October 2017 to December 2018

Version V 1.0



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Contribute to the establishment, in the LA Sítio de Monfurado and beyond (Montado territories in the Alentejo region) a regular dialogue with actors interested in the sustainability of the Agro-sylvo-pastoral system HNV Montado. This will be achieved through the support, participation and dissemination of the existent initiative – “Tertulias do Montado”. This initiative is included in the HNV-Link “Social and Institutional” innovation theme and may work as an enabler for promoting innovation in different themes such as “Farming techniques and management”, “Products and marketing” and “Regulatory and policy” innovation. ....	11
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## 1. Starting point

*This first section will be the reference point for each narrative of “HVN innovation process” at LA level. The aim is to briefly summarize the following three points:*

- *The HNV Vision: challenges & actors analysis (cf. for instance the discussions and results highlighted during session 1 of NM#2)*
- *The Innovation situation @ LA level: scoring (cf. for instance the discussions and results highlighted during session 2 of NM#2)*
- *The LA strategy: Innovation needs to be addressed as priorities (cf. for instance the discussions and results highlighted at the beginning of session 3)*

*This will be done using materials and conclusions from the Shaping Phase (Atlas, Compendium, Innovation Fair Workshops, etc.).*

*However, throughout the course of the Using Phase, some priorities can be re-assessed; the Vision can be improved and included new elements. Do not hesitate to keep a written record of all the events and information that contributed to the consolidation of the HNV Vision.*

### 1.1 HNV Vision of [Name of the LA]

Date	Your text – notes – pictures/tables, etc.
(dd/10/2017)	<p data-bbox="405 791 1395 858"><b>Slogan</b> <i>(short sentence that captures best up the HNV innovation project for the LA)</i></p> <p data-bbox="405 906 936 938"><b>MONTADO INTEGRATED MANAGEMENT</b></p> <p data-bbox="405 986 2045 1177"><b>Short Description of the Vision</b> <i>(short summary of the Vision explaining why it is challenging the Business as Usual scenario provided in you Baseline Assessment – what are the expected impacts or changes both from an HNV conservation perspective (evolution of semi-natural vegetation) on the LA and on the agricultural situation? keeping in mind WP1’s moto: “development in HNV areas in not the same as development for HNV in rural area” – you may want also to refer to the Atlas’s trajectories...)</i></p> <p data-bbox="405 1225 2045 1393">A common vision for the future of Montado in the LA Sítio de Monfurado acknowledges, promotes and valorises the inherent features of this complex agro-silvo-pastoral system while also maintaining its intrinsic rurality. The Montado in this vision is considered as an identity element of the land use and is valorised as an agro-silvopastoral system and recognised as a biodiversity hot spot with multiple public services. The different “layers” of the ecosystem (soil, herbage and shrubs, trees and animals) are interdependent and directly affected by management activities. The various products of this unique ecosystem are also intimately connected to the identity of the Montado in</p>



this vision.

The present decline of the Montado which has been related, mostly, to intensification and in some cases abandonment may lead to more discontinuities and less dense covers and even disappearance in certain areas. This represents the “business as usual scenario” and will impact the valued landscape and rural identity of the Montado.

In order to preclude these declining trends with implications on the differentiating character of the landscape and its HNV character, this vision put forward the creation of a prestige brand of Montado. The creation of a Montado brand requires cooperation between actors, strategic plan, training and leadership. The Montado brand would act as a recognized identification umbrella for all products and services coming from the Montado, enabling a more coherent commercialization and supporting the creation of added value which in turn support sustainable management.

#### Visual

*(Different visuals have been displayed by the LA in order to show the possible dynamics in term of landscape and biodiversity conservation, please insert here the ones you are using with a brief comment).*



Figure 1 - Vision for the Montado of Sítio de Monfurado – 2030  
(drawing by Carolina Velloso)



A visual representation of the desired vision for 2030 (fig 1) for the LA Sítio de Monfurado integrates the previously referred different layers of the ecosystem Montado, calling the attention to the importance of a living system at different scales (see box of the living soil) with the presence of actors working collectively towards a common vision. The vision also highlights the importance of the unique products of the Montado and raises their importance for the identity and sustainability of the system.



### Actors' typology

*Who are the main key targets to engage in the LA HNV Vision? What are their relations to the territory? What are their interests in contributing to the Vision (Beneficiaries versus Attendees)? Etc. Below, an example of actor typology, but other strategic display can be better adapted to your situation. The aim is to have a first "strategic mapping" to show how the situations has evolved throughout the using phase.*

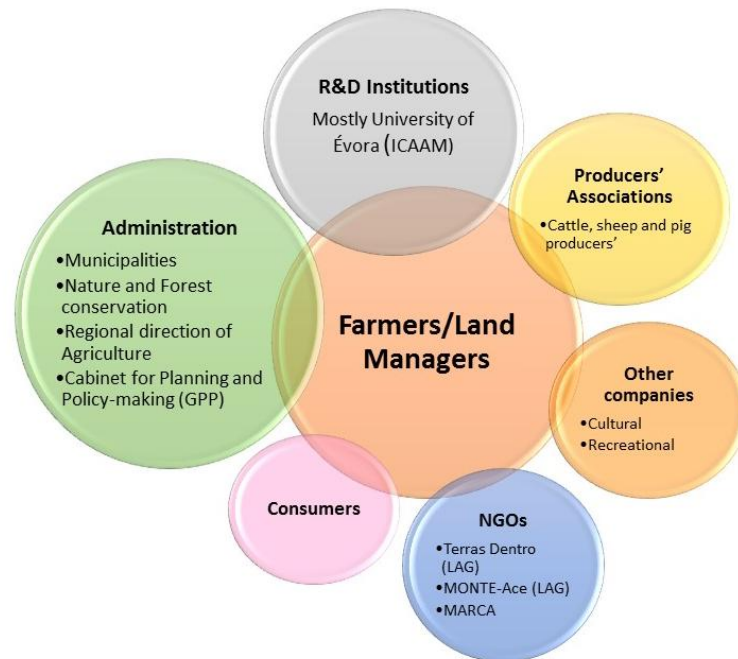


Figure 2. Main groups of actors involved in the HNV vision for the Montado of the LA – Sítio de Monfurado

The main key targets to engage in the Montado LA HNV vision are represented in fig 2. Farmers and/or land managers have central role due to their direct connection with the territory through day by day management decisions.

At present the most privileged platform for relations among the different actors is the initiative "Tertulia do Montado". This initiative (ICAAM/UÉvora) establishes a regular dialogue among the different actors of the Agro-sylvopastoral system Montado. The "Tertulia do Montado" have been happening every two months since April 2016 and follow a common agenda of issues related to the Montado, established by the participants in the first meeting.

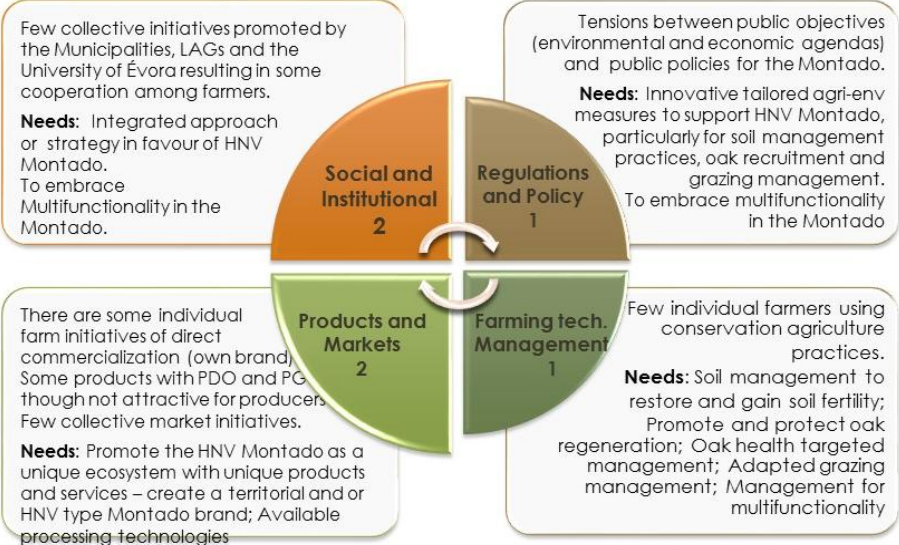
The groups of actors more actively represented in discussion related to the HNV Vision of the Montado have been R&D institutions, administration and farmers and land managers. Other groups of actors are less involve at the present stage but may become engaged as the using phase of HNV-Link progresses.

(dd/mm/year)	<i>Updates</i>
(dd/mm/year)	<i>Updates</i>

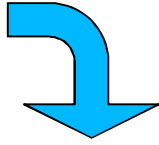




## 1.2 The Innovation Situation in Sítio de Monfurado

Date	Your text – notes – pictures/table
(Novembre/2017)	<p data-bbox="450 416 1099 488"><b>Innovation scoring</b> <i>According the four themes – cf. Session 2 of NM#2</i></p> <div data-bbox="472 635 1368 1289" style="text-align: center;"> <p data-bbox="607 639 1144 675">LA innovation scoring and needs</p>  <p data-bbox="472 742 875 986">           Few collective initiatives promoted by the Municipalities, LAGs and the University of Évora resulting in some cooperation among farmers.  <b>Needs:</b> Integrated approach or strategy in favour of HNV Montado. To embrace multifunctionality in the Montado.         </p> <p data-bbox="976 742 1368 986">           Tensions between public objectives (environmental and economic agendas) and public policies for the Montado.  <b>Needs:</b> Innovative tailored agri-env measures to support HNV Montado, particularly for soil management practices, oak recruitment and grazing management. To embrace multifunctionality in the Montado         </p> <p data-bbox="472 1034 875 1289">           There are some individual farm initiatives of direct commercialization (own brand). Some products with PDO and PG though not attractive for producers. Few collective market initiatives.  <b>Needs:</b> Promote the HNV Montado as a unique ecosystem with unique products and services – create a territorial and or HNV type Montado brand; Available processing technologies         </p> <p data-bbox="976 1034 1368 1289">           Few individual farmers using conservation agriculture practices.  <b>Needs:</b> Soil management to restore and gain soil fertility; Promote and protect oak regeneration; Oak health targeted management; Adapted grazing management; Management for multifunctionality         </p> </div>



	<p><b>Innovation priorities</b> <i>According to the four themes – cf. Session 2 of NM#2</i></p> <p><u>Priority questions – innovation gaps:</u></p> <ol style="list-style-type: none"> <li>1. Low soil fertility</li> <li>2. Very deficient oak recruitment</li> <li>3. Undifferentiated products of the Montado</li> </ol> <div style="text-align: center;">  <p><u>Innovation themes:</u></p> <p>Regulations and policy Farming techniques and management Products and markets</p> </div> <p>Innovation gaps for the Montado were identified and innovation needs prioritised in the Baseline Assessment and Innovation Report of the LA –Sitio de Monfurado. To work on soil fertility as the core of the Montado system was the most voted innovation followed by the development of protection devices for oak recruitment and the development of a territorial Montado prestigious brand. Details related to the implementation of these innovations were discussed during the Innovation Seminar, and there was a general agreement that the most effective way for implementing those, would be through the use of specifically developed agri-environmental measures for a “well preserved Montado”</p>
(dd/mm/year)	<i>Updates</i>
(dd/mm/year)	<i>Updates</i>



### 1.3 The Sítio de Monfurado strategy as HNV Learning Area: making choices

*Within the time frame of HNV-Link project, there is a need to narrow the innovation needs and priorities raised up in the “innovation situation analysis”, in order to realistically target activities and means that can make the difference for HNV challenges. Making explicit such strategic choices is a pragmatic posture, which is building both on a strategic understanding of the situation and the wise use of windows opportunities, favorable circumstances, and sometimes unexpected events, etc. It is expected that this section may evolve during the course of the Using Phase.*

Date	Your text – notes – comments - pictures/table
(November/2017)	<p><b>Overall Objectives</b> <i>Describe the goals to be achieved by the end of the project, in terms of promoting innovation in the LA and beyond.</i></p> <p>Contribute to the establishment, in the LA Sítio de Monfurado and beyond (Montado territories in the Alentejo region) a regular dialogue with actors interested in the sustainability of the Agro-sylvo-pastoral system HNV Montado. This will be achieved through the support, participation and dissemination of the existent initiative – “Tertulias do Montado”. This initiative is included in the HNV-Link “Social and Institutional” innovation theme and may work as an enabler for promoting innovation in different themes such as “Farming techniques and management”, “Products and marketing” and “Regulatory and policy” innovation.</p> <p><b>Priorities</b> <i>Describe the priorities you picked up among the “innovation scoring and priorities” and explain why they are important and should be addressed within HNV-Link project</i></p> <p>Priority 1: The main priority defined by the LA team as a result of the discussions in meeting and workshops and information gathered throughout the Baseline Assessment and the Innovation Report relates to the development of agro-environmental measures to specifically target objectives related to the resilience of the Montado system. This first priority is included in the “Regulation and Policy” innovation theme of the HNV-Link project and may be a mean to deal with the innovation gaps/questions identified for the Montado of Sítio de Monfurado: Low soil fertility and the Very deficient oak recruitment. Furthermore, working towards the construction of specific policies for the sustainability of Montado will contribute to harmonize the public policies and current stated public objectives (Fig. 3) which at present are dissonant for the agro-sylvo pastoral Montado management.</p>



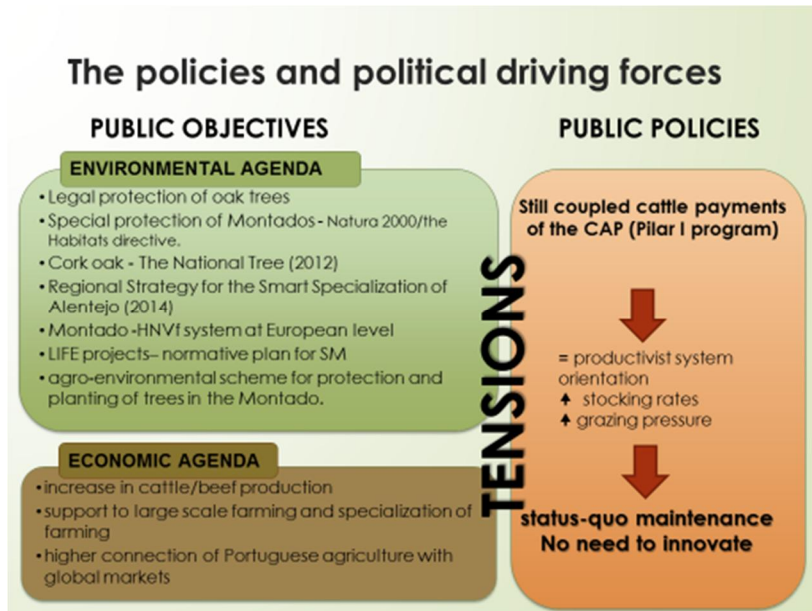


Figure 3. Diagram representing the contrasting stated public objectives regarding the Montado and the public policies that affect the Montado.

### Specific Objectives

*Describe the specific objectives under each chosen priority*

Priority 1: Work towards the development of agro-environmental measures to specifically target objectives related to the resilience of the Montado system

Specific objectives: To gather the relevant actors and create the necessary conditions for the co-construction of agro environmental measures that set objectives related to resilience of HNV Montado with the users, and design a “payment for results” and “payment for actions” or “mixed approach” to promote these objectives.

### Main Actions

*Explain the main actions you plan to realize to achieve these objectives (meetings with authorities; public workshops, mass media communication, etc.)*

1. Meetings with administration: The realization of meetings with specific members of the Cabinet for planning and policy making (GPP) from the National Ministry of Agriculture.
2. Public workshops, partly integrated in the initiative "Tertúlia do Montado"
3. Technical meetings with specialists.
4. Cross visits (Visit to the LA The Burren) to learn from previous experience in the design and implementation of RBPS.
5. Regional and National communication through the National Rural Network and through regional events and publications.
6. Participation in project applications to build a pilot agri-environmental scheme in the Montado of Sitio de Monfurado.

### Actors

*Present the different actors that you are going to engage in the realization of each priority. Please make the difference between the direct beneficiaries (specifying what is their direct benefit) of the action and the attendees (people you have to engage, but who are not directly benefiting from the action)*

Priority 1: Work towards the development of agro-environmental measures to specifically target objectives related to the resilience of the Montado system

Direct beneficiaries:

Land managers/land owners – Directly implied and engaged in the construction of Agri-environmental measures will benefit from the better environmental performance of their farms without loss of economic revenue. The farmers involved in the co-construction process will also benefit from a better public recognition regarding their contribution to environmental sustainability and their active involvement on the preservation of local biodiversity. Land manager will also benefit from the scientific and technical advise regarding management practices put forward to reach objectives defined in the RBPS.

National administration – The GPP will be a key actor since it has the knowledge and experience of development of political measures at national level. After the design work and after any pilot implementation experience, GPP is the responsible entity for the eventual implementation at a larger scale, of any type of agri-environmental scheme.



R&D institutions – Particularly Universidade de Évora researchers are deeply engaged and will have an important role on the discussion of technical aspects related to the definition of indicators and also to the knowledge transfer related to alternative management practices needed to accomplish the established results.

Producers associations – vide land managers

Other actors:

Regional administration – Particularly the Institute for forest and nature conservation (ICNF) and also the regional direction of agriculture (DRAPAL) will be engaged and will actively contribute to the evaluation of the indicators developed to assess the extent of the pre- established result accomplished.

NGOs – Nature protection league (LPN) is a National NGO that led the process of development of the Agri-environmental measure - Zonal Programme of Castro Verde. This NGO ha a long term experience which may greatly contribute to the specific objective of our priority 1 - Work towards the development of agro-environmental measures to specifically target objectives related to the resilience of the Montado system.

Other LAGs which have an important history of close collaboration with local producers and also consumers, are also engaged.  
Consumers

### Risks

*Identify and describe the potential risks of the LA Action Plan strategy's implementation, the analysis of their possible consequences on the expected achievements, and make a list of proposed risk mitigations measures (actors interest, means, etc.)*

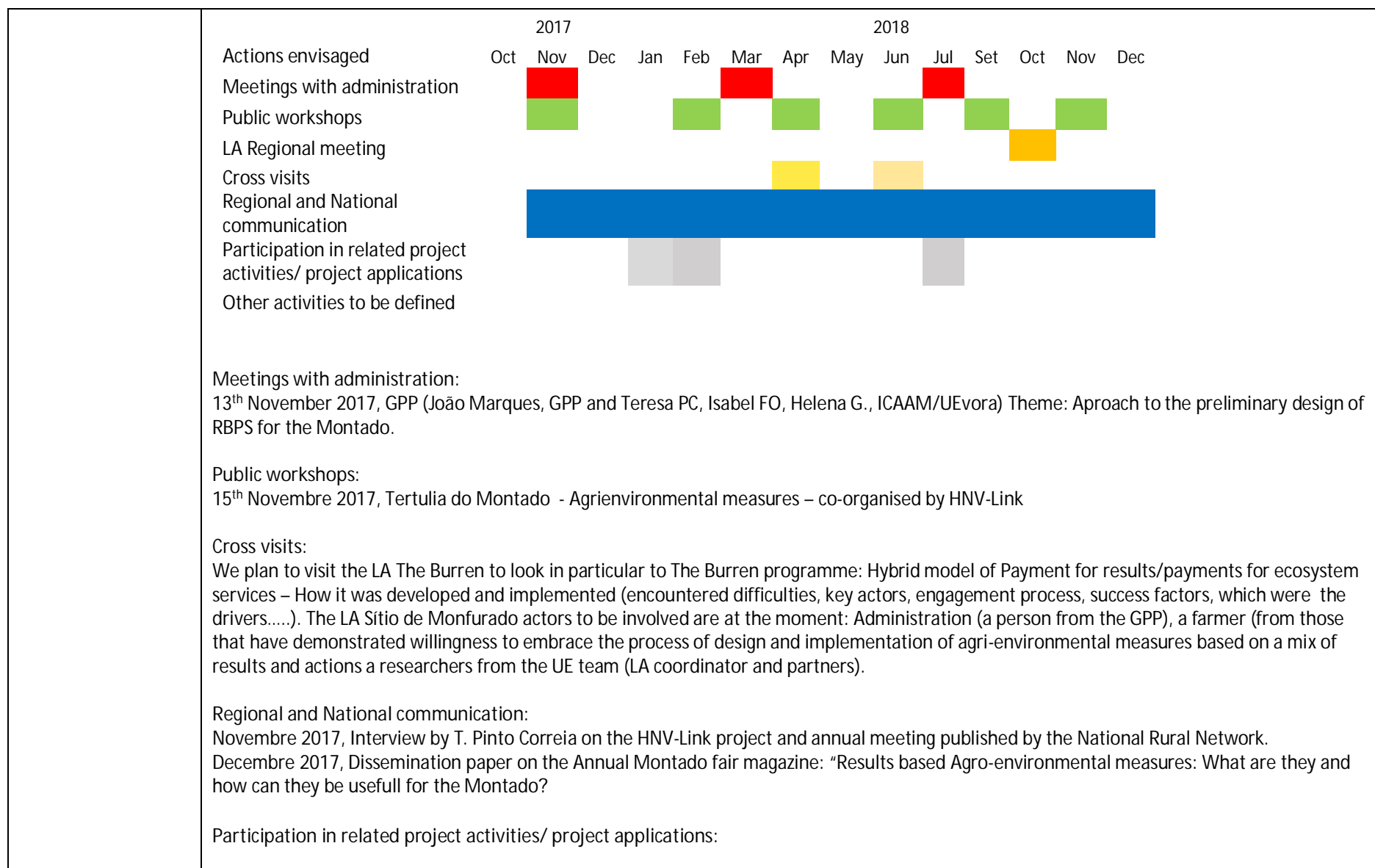
### Best Practices

*Describe what already works in your LA strategy that may be transferred to other LA strategies*

### Timeline

*Establish a LA action plan calendar (or Gantt Chart) for the Using Phase of the project to show the proposed schedule of activities (Cross-Visits, Regional Meetings, etc.)*





	<p>16<sup>th</sup> January 2018, Participation on the kick off meeting of the INOVMontado project (Part of the National Rural Network work programme - Observation of Agriculture and the rural territories – thematic: Innovation), which aims at contributing to fight the decline of Montado through the collection, organization and dissemination of existing knowledge among local actors related to the Montado (two members of the HNV-Link (Teresa Pinto Correia and Isabel Ferraz de Oliveira are members of the INOVMontado team.</p>
(23/03/2018)	<p>Public workshops:  15<sup>th</sup> November 2017 - Tertulia do Montado: Montados’ health: problems and management practices (part I)  2nd February 2018 – Tertulia do Montado: Montados’ health: problems and management practices (part II)  21<sup>st</sup> March 2018 – Tertulia do Montado: Climate change scenarios and management practices adaptation in Montados  17<sup>th</sup>-18<sup>th</sup> May 2018 – Participation on the organization of a Training workshop on “Montado health: present knowledge, prevention and mitigation measures” (directed mainly to farmers).</p> <p>Cross visits:  Cross visit to the Burren scheduled to the 4<sup>th</sup> to 7<sup>th</sup> of June 2018.  We will use the opportunity to gather key actors from our LA to learn from the experience of development and co-construction of RBPS in The Burren.</p> <p>Documents prepared:</p> <ul style="list-style-type: none"> <li>· Cross visit proposal (sent to James Moran)</li> <li>· List of actors to invite</li> <li>· Invitation letter for participants</li> <li>· Information note 1</li> </ul> <p>By the 31<sup>st</sup> of March we should have a closed list of participants (about 16 people): Farmers, administration, NGOs, Researchers</p> <p>Cross visit to La Vera scheduled to the 18<sup>th</sup>-19<sup>th</sup> of April 2018 - Participation in the Workshop “Grazed territories 3: Innovation and participation” organized in collaboration with the “La Vera” LA from HNV-Link.</p> <p>April, 20<sup>th</sup>: Participation in an informal meeting to be held in Spain, La Vera, with other European and nation-wide projects working on pastoralism, co-organized by the Spanish partner of HNV-Link.</p> <p>Regional and National communication:</p>





	<p>March 2018: Interview by MI Ferraz de Oliveira in the National Rural Network magazine: HNV Systems: European project boosts innovation in Alentejo (<a href="https://issuu.com/823289/docs/revistaemrede_6-final">https://issuu.com/823289/docs/revistaemrede_6-final</a>)</p> <p>Participation in related project activities/ project applications:</p> <p>April, 9<sup>th</sup>-13<sup>th</sup>: Detail of the Sítio de Monfurado Vision developed in previous project and enriched in HNV-Link, WP1, using the Territory Game approach (Collaboration activity with the ARMINET project – DIVERCROP).</p> <p>Regular participation on the initiative “Tertúlia do Montado” that occur every two months <a href="http://tertuliasdomontado.blogspot.com/">http://tertuliasdomontado.blogspot.com/</a></p> <p>Co-organization of the cross-visit to the Burren with the project ProAgriFor (Alentejo2020).</p>
(28/12/2018)	<p>Meetings with administration and follow up meetings of the cross visit to the Burren: 13th November 2017, GPP (João Marques, GPP and Teresa PC, Isabel FO, Helena G., ICAAM/UEvora) Theme: Approach to the preliminary design of RBPS for the Montado.</p> <p>From the 7th June until the 3th Novembre, 14 meeting took place among different actor in order to take the first step on the construction of a results based pilot program for the Montado. Themes and links to the meeting minutes are provided in a table within section 2.3 Next steps and follow-up activities?</p> <p>Public workshops: 15<sup>th</sup> November 2017 - Tertulia do Montado: Montados’ health: problems and management practices (part I) 2nd February 2018 – Tertulia do Montado: Montados’ health: problems and management practices (part II) 21<sup>st</sup> March 2018 – Tertulia do Montado: Climate change scenarios and management practices adaptation in Montados 17<sup>th</sup>-18<sup>th</sup> May 2018 – Participation on the organization of a Training workshop on “Montado health: present knowledge, prevention and mitigation measures” (directed mainly to farmers). 20<sup>th</sup> September 2018 – Tertulia do Montado: Montado adaptation strategies to climate change 30<sup>th</sup> November 2018 - XV JORNADAS IBÉRICAS DO MONTADO - Results based payments for Montado adaptive management: The post 2020 agro -environmental paradigm. HNV-Link Regional Meeting.</p> <p>Cross visits:</p>



Cross visit to the Burren scheduled to the 4<sup>th</sup> to 7<sup>th</sup> of June 2018.

We will use the opportunity to gather key actors from our LA to learn from the experience of development and co-construction of RBPS in The Burren.

Documents prepared:

- Cross visit proposal (sent to James Moran)
- List of actors to invite
- Invitation letter for participants
- Information note 1

By the 31<sup>st</sup> of March we should have a closed list of participants (about 16 people): Farmers, administration, NGOs, Researchers

4<sup>th</sup> to 7<sup>th</sup> June 2018 -Accomplishment of the cross-visit to the Burren (see details and report in dedicated section).

Cross visit to La Vera scheduled to the 18<sup>th</sup>-19<sup>th</sup> of April 2018 - Participation in the Workshop "Grazed territories 3: Innovation and participation" organized in collaboration with the "La Vera" LA from HNV-Link.

April, 20<sup>th</sup>: Participation in an informal meeting to be held in Spain, La Vera, with other European and nation-wide projects working on pastoralism, co-organized by the Spanish partner of HNV-Link.

18<sup>th</sup> -19<sup>th</sup> of April 2018 - Accomplishment of the cross-visit to La Vera (see details and report in dedicated section).

Regional and National communication:

March 2018: Interview by MI Ferraz de Oliveira in the National Rural Network magazine: HNV Systems: European project boosts innovation in Alentejo ([https://issuu.com/823289/docs/revistaemrede\\_6-final](https://issuu.com/823289/docs/revistaemrede_6-final)) (Portuguese)

June 2018: National Rural Network News article - Portuguese farmers observe in loco innovative agro-environmental program in Ireland. ([http://www.rederural.gov.pt/images/Noticias/Produtos\\_RRN/Noticia\\_visita\\_Burren.pdf](http://www.rederural.gov.pt/images/Noticias/Produtos_RRN/Noticia_visita_Burren.pdf)) (Portuguese)

September 2018: Article in the ICAAM bulletin - Results-based agro-environmental measures - a new



paradigm inspired in the burren program in Ireland  
([http://www.icaam.uevora.pt/content/download/1393/7813/version/2/file/boletim\\_setembro2018.pdf](http://www.icaam.uevora.pt/content/download/1393/7813/version/2/file/boletim_setembro2018.pdf)) (Portuguese)

October 2018: Article in technical portuguese Magazin – Vida Rural about HNV-Link and the Cross visit to the Burren – Montado as a study case for European innovation project. (<https://www.vidarural.pt/insights/montado-e-balao-de-ensaio-para-projeto-europeu-de-inovacao/>) (Portuguese)

Novembre 2018: Oral presentation at the “2º Colóquio sobre a Flora e a Fauna dos Montados »  
([https://www.terrasdentro.pt/assets/programa\\_flora\\_fauna\\_montados.pdf](https://www.terrasdentro.pt/assets/programa_flora_fauna_montados.pdf)) - Are innovative approaches important for the sustainability of High Natural Value farming systems? The case of the Montado of Sítio de Monfurado.

([https://www.terrasdentro.pt/assets/apresentacaograndola\\_isabel\\_ferraz.pdf](https://www.terrasdentro.pt/assets/apresentacaograndola_isabel_ferraz.pdf))

Ferraz-de-Oliveira MI, Guimarães H, Sales-Baptista E, Pinto-Correia T (2018). As abordagens inovadoras são importantes para a sustentabilidade dos sistemas agrícolas de Elevado Valor Natural? O caso do Montado do Sítio de Monfurado. 2º Colóquio Sobre a Fauna e a Flora dos Montados: uma abordagem multifuncional, Grandola, 8 e 9 de Novembro.

December 2018: National Rural Network News article – Result-based agro-environmental Measures for the Montado.  
([http://www.rederural.gov.pt/images/Medidas\\_Agroambientais\\_com\\_base\\_em\\_resultados\\_para\\_o\\_Montado.pdf](http://www.rederural.gov.pt/images/Medidas_Agroambientais_com_base_em_resultados_para_o_Montado.pdf))  
(Portuguese)

Participation in related project activities/ project applications:

April, 9<sup>th</sup>-13<sup>th</sup>: Detail of the Sítio de Monfurado Vision developed in previous project and enriched in HNV-Link, WP1, using the Territory Game approach (Collaboration activity with the ARMINET project – DIVERCROP).

Regular participation on the initiative “Tertúlia do Montado” that occur every two months  
<http://tertuliasdomontado.blogspot.com/>

Co-organization of the cross-visit to the Burren with the project ProAgriFor (Alentejo2020).

Co-organization of the Jornadas Ibéricas do Montado



	<p>Co-organization of the . 2º Coloquio Sobre a Fauna e a Flora dos Montados: uma abordagem multifuncional (Novembre, 2018)</p>
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	<p>Participation on the II Iberian Conference on acorns (<a href="https://vipa1051.com/eventos/segunda-conferencia-bolota/">https://vipa1051.com/eventos/segunda-conferencia-bolota/</a>) Novembre 2018</p>
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## 2. Innovation exchanges – Cross Visits

*Peer learning exchanges between LA will be implemented through Cross-Visits. These cross-visits/operational study tours will involve key actor groups. They will discuss the innovations in their real agro-ecological and socio economic context, to better understand the possibilities of transfer. They will be organized according a common methodology.*

*This chapter of the “LA Action Plan” will take stock of the different innovation exchanges that have been organized during the Using Phase: objectives, implementation, results, through: A Visit Report (from the Visiting LA), A Host Report (if the LA is hosting some Cross Visit), Next step and follow-up activities: a follow up of the innovation transfer process.*

### 2.1 Visit Report(s)

*A more detailed Cross-Visit methodology will be issued in the first months of the Using Phase. It will specify and enrich those general guidelines. However, the following core questions should be addressed in the Visit Report(s):*

- Date, Place, Innovation Cases visited and participant list
- Reasons of the choice of the cross-visit
- Expectations of the participants
- Expectations for the Learning Area
- Narrative: who, when, where, what?
- Lessons learnt: for the participants – and at the scale of the Learning Area
- To what extend those innovations / good practices contribute to the HNV Vision? What type of innovation needs or gaps are they answering to? How do they contribute to solve the bottlenecks and challenges for HNV farming in your area (in line with the Business as Usual Scenario) (1) from the HNV conservation perspective (2) from a socio-economic perspective?
- If it was possible to do it again.... What would be the same? What would be different?

The above information on the two cross-visits of the Portuguese LA (La Vera in Spain and The Burren in Ireland), is presented in the documents provided on the table underneath:



Documents	Link
<b>Cross-visit to La Vera</b>	-
-Cross-visit planning	<a href="https://drive.google.com/open?id=1MaONoYp972ehVhrhLsiAhVE3xF9J-064">https://drive.google.com/open?id=1MaONoYp972ehVhrhLsiAhVE3xF9J-064</a>
-Report of the Cross-visit to La Vera	<a href="https://drive.google.com/open?id=19_BJNuuognGkj_n22s4ZiAZWm_SwIN8G">https://drive.google.com/open?id=19_BJNuuognGkj_n22s4ZiAZWm_SwIN8G</a>
-Presentation of the LA Sítio de Monfurado innovation at "Territoreos Pastoreados"	<a href="https://drive.google.com/open?id=1z3wgMZA5DSM2Q3CB1cux80T0eMAgF8HP">https://drive.google.com/open?id=1z3wgMZA5DSM2Q3CB1cux80T0eMAgF8HP</a>
Short video – testimony of the Portuguese participation on "Territoreos Pastoreados" – Farmers1 (in Portuguese)	<a href="https://drive.google.com/open?id=1o0WimJuwyz5RWsam1F2hLZToYd2YUX6O">https://drive.google.com/open?id=1o0WimJuwyz5RWsam1F2hLZToYd2YUX6O</a>
Short video – testimony of the Portuguese participation on "Territoreos Pastoreados" – Farmers2 (in Portuguese)	<a href="https://drive.google.com/open?id=17F7IdimEtS7ph8dUnVRKj_Dncm8TXMpi">https://drive.google.com/open?id=17F7IdimEtS7ph8dUnVRKj_Dncm8TXMpi</a>
Short video – testimony of the Portuguese participation on "Territoreos Pastoreados" – Researchers (in Portuguese)	<a href="https://drive.google.com/open?id=1o0WimJuwyz5RWsam1F2hLZToYd2YUX6O">https://drive.google.com/open?id=1o0WimJuwyz5RWsam1F2hLZToYd2YUX6O</a>
-Technical activity report – CV Monfurado to La Vera	<a href="https://drive.google.com/open?id=1tW0aIF_AlloV2adZGfJhbGNt0AJ15QY-">https://drive.google.com/open?id=1tW0aIF_AlloV2adZGfJhbGNt0AJ15QY-</a>
<b>Cross-visit to The Burren</b>	
-Cross-visit planning	<a href="https://drive.google.com/open?id=1MaONoYp972ehVhrhLsiAhVE3xF9J-064">https://drive.google.com/open?id=1MaONoYp972ehVhrhLsiAhVE3xF9J-064</a>
-Concept note of the cross-visit	<a href="https://drive.google.com/open?id=1SH3f01usU2tbJNyref7AOLqJM7X00sYK">https://drive.google.com/open?id=1SH3f01usU2tbJNyref7AOLqJM7X00sYK</a>
-Information note for participants -1	<a href="https://drive.google.com/open?id=1JO_DpJSxwAJqw2Qr7iznCi_U0XqwFC67">https://drive.google.com/open?id=1JO_DpJSxwAJqw2Qr7iznCi_U0XqwFC67</a>
-Information note for participants -2	<a href="https://drive.google.com/open?id=1ErPlwX5gdmBHrV-oMIV3bCpbOH6kvAfr">https://drive.google.com/open?id=1ErPlwX5gdmBHrV-oMIV3bCpbOH6kvAfr</a>
-Information note for participants -3	<a href="https://drive.google.com/open?id=1nzTr8KRJ2cwOkx0EhPEvuQWG8HruYOzd">https://drive.google.com/open?id=1nzTr8KRJ2cwOkx0EhPEvuQWG8HruYOzd</a>
-Report of the cross-visit to The Burren	<a href="https://drive.google.com/open?id=1FjhtTQKJZwKd2DfdRNtf3TORE9k-sOaf">https://drive.google.com/open?id=1FjhtTQKJZwKd2DfdRNtf3TORE9k-sOaf</a>
-Presentation of the LA Sítio de Monfurado innovation at the workshop organized within the cross-visit	<a href="https://drive.google.com/open?id=1qOmgNkHsrOHD-vp8Fe1VG55G-6KyhuOt">https://drive.google.com/open?id=1qOmgNkHsrOHD-vp8Fe1VG55G-6KyhuOt</a>
-List of participant of the workshop at the cross-visit	<a href="https://drive.google.com/open?id=1YGU2jxmiv9IATE6g70en66YX-q3yOwKA">https://drive.google.com/open?id=1YGU2jxmiv9IATE6g70en66YX-q3yOwKA</a>
-Short video – testimony of the Portuguese participation on the cross-visit – Researchers 1 (in Portuguese)	<a href="https://drive.google.com/open?id=1cCqmC2wYfW8gszBTUm-KK1zP1hzebPjG">https://drive.google.com/open?id=1cCqmC2wYfW8gszBTUm-KK1zP1hzebPjG</a>
-Short video – testimony of the Portuguese participation on the cross-visit – Public administration 1 (in Portuguese)	<a href="https://drive.google.com/open?id=1VkjAXPtelMQyISWpkuWmiGM_ZQ1cPb10">https://drive.google.com/open?id=1VkjAXPtelMQyISWpkuWmiGM_ZQ1cPb10</a>
-Short video – testimony of the Portuguese participation on the cross-visit – Farmers 1 (in Portuguese)	<a href="https://drive.google.com/open?id=18J_dr--ha9Jc1MJpJX6Zt90hk51rQVgO">https://drive.google.com/open?id=18J_dr--ha9Jc1MJpJX6Zt90hk51rQVgO</a>
-Short video – testimony of Irish host on the cross-visit –	<a href="https://drive.google.com/open?id=1aktWKzW59Z4WwbEEEr4KYMNNFzePIL-e">https://drive.google.com/open?id=1aktWKzW59Z4WwbEEEr4KYMNNFzePIL-e</a>



Researcher/advisor 1 (English)	
-Short video – testimony of the Portuguese participation on the ---cross-visit – Researchers 2 (in English)	<a href="https://drive.google.com/open?id=1zBjqUW3jrVTtLFZVJPTmWf13ZaDdKs8q">https://drive.google.com/open?id=1zBjqUW3jrVTtLFZVJPTmWf13ZaDdKs8q</a>
-Short video – testimony of the Portuguese participation on the cross-visit – Researchers 3 (in Portuguese)	<a href="https://drive.google.com/open?id=1c-Pg-N6xxo0gYY74h8cOsN3_FHZ0Q8__">https://drive.google.com/open?id=1c-Pg-N6xxo0gYY74h8cOsN3_FHZ0Q8__</a>
-Report-Poster (visual) of the cross-visit to The Burren	<a href="https://drive.google.com/open?id=1uDULIGVMGgd9iuF2wQ0C8NANFChMN2tD">https://drive.google.com/open?id=1uDULIGVMGgd9iuF2wQ0C8NANFChMN2tD</a>
-Report-Postcard (visual) of the cross-visit to The Burren	<a href="https://drive.google.com/open?id=1DXOPQoYbnOIImpANQQZXDQLeUbfvQXwT">https://drive.google.com/open?id=1DXOPQoYbnOIImpANQQZXDQLeUbfvQXwT</a>
-Technical activity report – CV Monfurado to The Burren	<a href="https://drive.google.com/open?id=106RItIXkGmKgwwgMFk4N4YIgwN2xD4rx">https://drive.google.com/open?id=106RItIXkGmKgwwgMFk4N4YIgwN2xD4rx</a>

## 2.2 A Host Report(s)

*A more detailed Cross-Visit methodology will be issued in the first months of the Using Phase. It will specify and enrich those general guidelines. However, the following core questions should be addressed in the Visit Report(s):*

There were no cross-visits to the Portuguese LA, which was visited by all project partners, during the 2<sup>nd</sup> network meeting (October 2017).

- Narrative: who, when, where, what?
- Lessons learnt: what did we learnt from the visitors and their questions? Did they raise some blind spots?
- If it was possible to do it again.... What would be the same? What would be different?

## 2.3 Next steps and follow-up activities?

*In this section, the aim is to provide a follow up of the cross-visit and keep track of the Innovation transfer process: its achievements and its limits. Indeed, transferring HNV innovation which are context-based (as highlighted in the HNV-Link Compendium) into another context is a challenge in itself.*

*Please describe how you will follow and support the innovation transfer? What can be transfer? How? Who will be part of the transfer? What is the time frame (short agenda)? And what are the expected results?*



*The main target for innovation transfer within the LA Sítio de Monfurado relates to the construction of a mixed (result-based and action-based) scheme of agro-environmental measures to support the sustainability of the Montado, inspired in th Burren program. In order to progress in this construction process, a multiactor approach was pursued and a large number of meetings took place between June and Decembre 2018 (see table underneath with meeting themes and links to meeting minutes. The RM that took place in 3th Novembre 2018 was a moment for opening up the discussion at a regional and National level and also an opportunity to raise interest on the political sector (see report on the regional meeting)*

Nº	Theme	Nº de particip	Date 2018	Link to minutes
1	Reflexiono n the Cross visit to the Burren	19	7 Jun	<a href="https://drive.google.com/open?id=18kSBbUbOeC_zZyFz5zGXvtK2DJ5YzNP">https://drive.google.com/open?id=18kSBbUbOeC_zZyFz5zGXvtK2DJ5YzNP</a>
2	Organization of the Montado Program (groups 1 and 2), definition of objectives: -Preliminary identification of objectives to consider within the Montado program - Identificatio, planning and schedule of the next steps of the process	11	15 Jun	<a href="https://drive.google.com/open?id=1mTnNjTHxM2yXdQ9QvXkgARibSZXR_icO">https://drive.google.com/open?id=1mTnNjTHxM2yXdQ9QvXkgARibSZXR_icO</a>
3	Working methodology definition within group2.	7	27 Jun	<a href="https://drive.google.com/open?id=1Gu4HMrbl_JXZetWpq6ipA_Wig7o3ncYf">https://drive.google.com/open?id=1Gu4HMrbl_JXZetWpq6ipA_Wig7o3ncYf</a>
4	Water and biodiversity categories (group 2) -Identification of specific environmental results	4	5 Jul	<a href="https://drive.google.com/open?id=11E3rj_SgIIAyeOuyz19OfCdZdtBOt72">https://drive.google.com/open?id=11E3rj_SgIIAyeOuyz19OfCdZdtBOt72</a>
5	Soil, pastures and trees categories (group 2) - Preliminary definition of results to be achieved in each category, discussion of the relationship between environmental results and management actions.	4	26 Jul	<a href="https://drive.google.com/open?id=1JbOVgopzjxpHs_Yj-aHmEtYVK2FpWS3o">https://drive.google.com/open?id=1JbOVgopzjxpHs_Yj-aHmEtYVK2FpWS3o</a>
6	Water and biodiversity categories (group 2): -Identification target objectives for each environmental result previously defined.	6	13 Set	<a href="https://drive.google.com/open?id=1b1Z4C6nPrjnT4hxfZrtibZ4nSVDNMu1">https://drive.google.com/open?id=1b1Z4C6nPrjnT4hxfZrtibZ4nSVDNMu1</a>
7	Soil, pastures and trees categories (group 2) - Review of the strategy to progress towards the proposed environmental results and indicators.	4	20 Set	<a href="https://drive.google.com/open?id=1RPXQJ9vID19CnBStJ7eehOxH1Cvr5or8">https://drive.google.com/open?id=1RPXQJ9vID19CnBStJ7eehOxH1Cvr5or8</a>
8	Water and biodiversity categories (group 2):	3	3 Out	<a href="https://drive.google.com/open?id=139ZxR1uj0qC2whcmYueM2QC">https://drive.google.com/open?id=139ZxR1uj0qC2whcmYueM2QC</a>





	Discussion of environmental results, management practices that affect those results and possible visual indicators to assess the results.			Bmst7LvG-
9	Pastures category (group 2) Discussion with a pastures specialist (researcher) on the definition of environmental results to be achieved, agricultural practices affecting them and visual indicators to measure the environmental results defined for pastures.	4	10 Out	<a href="https://drive.google.com/open?id=1D7_6pe9ZdDnvu65nHdfhwnFh5ttnBGcj">https://drive.google.com/open?id=1D7_6pe9ZdDnvu65nHdfhwnFh5ttnBGcj</a>
10	Soil category (group 2) Discussion with a soil specialist (researcher) on the definition of environmental results to be achieved, agricultural practices affecting them and visual indicators to measure the environmental results defined for soils.	5	12 Out	<a href="https://drive.google.com/open?id=1bxW0_z4nBkuAT-ys17JM99G1QuiQaC0I">https://drive.google.com/open?id=1bxW0_z4nBkuAT-ys17JM99G1QuiQaC0I</a>
11	Trees category (group 2) Discussion with a oak trees specialist (researcher) on the definition of environmental results to be achieved, agricultural practices affecting them and visual indicators to measure the environmental results defined for oak trees.	4	9 e 10 Out	
12	Discussion on the requirements to set up a results based pilot program for the Montado (group 1): Discussion of the preliminary program of the Regional Meeting – Jornadas Ibéricas do Montado (HNV-Link)	5	12 Out	<a href="https://drive.google.com/open?id=1saJcLFHJv4cvOZfh3W4rOUj_7tDGZDNJ">https://drive.google.com/open?id=1saJcLFHJv4cvOZfh3W4rOUj_7tDGZDNJ</a>
13	Review, discussion and harmonization of environmental results and respective indicators to be presented on 30th November; Discussion of the draft program for the Jornadas Ibéricas do Montado to be held on 30 November in Portel (HNV-Link Regional Meeting); Preparation of the meeting to be held with GPP technicians on November 16.	10	12 Nov	<a href="https://drive.google.com/open?id=1Vjzs1_d2xqGKOHBO-6SleEs6ar_yL-WD">https://drive.google.com/open?id=1Vjzs1_d2xqGKOHBO-6SleEs6ar_yL-WD</a>
14	Meeting with the director of GPP and technicians to	12	16 Nov	<a href="https://drive.google.com/open?id=1FYqnADj015p2iw2Bx7I_cHCVLi">https://drive.google.com/open?id=1FYqnADj015p2iw2Bx7I_cHCVLi</a>



discuss the opportunity to develop a pilot results based program for the Montado and details of the draft proposal.

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### 3. LA regional meeting(s)

*Objectives of the LA regional meetings:*

*Reaching the regional / national AKIS;*

*Sharing at the national/regional level the HNV Vision established through the Baseline Assessment and the set of HNV innovations collected using also the compendium of innovations collected in all LA;*

*Triggering a reflection on innovation process adaptation: the main pathways by which to improve the economic viability of HNV farming, failure factors/constraints, contexts which allow innovation process to take off;*

*Starting a larger regional network on HNV farming and innovation brokering,*

*Based on general guidelines, each LA Coordinator will propose to the WP4 leader a "Regional Meeting Action Plan": concept note, materials, participant list, and agenda, and work methodology, expected results and impacts, type of reporting. This section will keep track of the different steps of implementation.*

*The LA Regional Meetings will play an influential role in the local dissemination process (hundreds of people are expected to be exposed to the HNV Link findings.*

*Therefore, depending on each LA specificities, the regional context, and means, LAs may also consider the possibility of organize a series of Regional meetings / seminars / events addressed to different audiences, goals, and purposes. Moreover, the LA could also consider the organization of the Regional Meeting within the framework of global major regional event / meeting / seminar, developed under the form of round table / session / workshop, when the goals and audiences could be reached in a better way, with the best expected impact. In these cases, the LA regional activity should be individually identified.*

The Regional Meeting was incorporated in the XVth Montado Iberian workshop, which was integrated in the XIX Montado Fair. The Montado Fair is an annual mostly national and also international event of economic, environmental, cultural and scientific importance. Exhibitors from various companies in the forestry sector, specifically in the cork sector, agri-food, catering and trade in general, have the opportunity to promote and market their products and develop business opportunities. In addition a number of workshops devoted to various thematic related to the different components of the Montado take place in the different days of the fair. The XVth Montado Iberian workshop was organized in two sessions (morning and afternoon session) which included plenary sessions and discussion moments using a participatory approach (link to the agenda provided in the table underneath). The workshop focus on rewarding for environmental results in the Montado. The thematic was addressed by speakers that presented the European, National and more local views, challenges and opportunities for the Montado. Experiences from other countries, particularly the Burren Programm from Ireland were presented and provided a great chance for discussion on opportunities to innovation transfer to the Montado. A proposal for the construction of a pilot case for results-



based payments for the Montado was presented as an outcome of the work developed under HNV-Link. The discussion moments enabled an exchange of knowledge among participants coming from the production sector including producers associations, public administration (regional and national), NGOs and research. For further details, please consult the RM documents provided in the table underneath.

Documents	Link
Regional Meeting - XVth Montado Iberian whorkshop	-
RM concept note	<a href="https://drive.google.com/open?id=12SO68u7i90bs-q8JkEiB0iCcoiAqaURe">https://drive.google.com/open?id=12SO68u7i90bs-q8JkEiB0iCcoiAqaURe</a>
RM invitation letter	<a href="https://drive.google.com/open?id=1_hO1uK9Z9XuiGpaaF0IkSScIJKOkB7Pa">https://drive.google.com/open?id=1_hO1uK9Z9XuiGpaaF0IkSScIJKOkB7Pa</a>
RM press release	<a href="https://drive.google.com/open?id=1nL6TQE14p2f83uMbOWP45TJXVDUVSapJ">https://drive.google.com/open?id=1nL6TQE14p2f83uMbOWP45TJXVDUVSapJ</a>
RM registration list	<a href="https://drive.google.com/open?id=1exuT-d5M-nOfNd3c1nWzJCd7wFUz79bR">https://drive.google.com/open?id=1exuT-d5M-nOfNd3c1nWzJCd7wFUz79bR</a>
RM program	<a href="https://drive.google.com/open?id=1h5KYHTJ8pxywOA2GqFdXPVbt5IQk3iM1">https://drive.google.com/open?id=1h5KYHTJ8pxywOA2GqFdXPVbt5IQk3iM1</a>
RM report	<a href="https://drive.google.com/open?id=1mB7HNqIps9mmKguF5L5y3Jlk19tBm-KD">https://drive.google.com/open?id=1mB7HNqIps9mmKguF5L5y3Jlk19tBm-KD</a>
Presentation from speaker – Hugo Costa (GPP)	<a href="https://drive.google.com/open?id=1gr59m7cYXbl1iR6OILTEI-M-2anSI-A">https://drive.google.com/open?id=1gr59m7cYXbl1iR6OILTEI-M-2anSI-A</a>
Presentation from speaker – Isabel Ferraz de Oliveira (UE/ICAAM))	<a href="https://drive.google.com/open?id=1mwexN2A2RG46-JHeR1-w8jR7HzKhuB9B">https://drive.google.com/open?id=1mwexN2A2RG46-JHeR1-w8jR7HzKhuB9B</a>
RM planning	<a href="https://drive.google.com/open?id=1uXEuRB3xLEIXSkccDq9WujzIC9PtVhb1">https://drive.google.com/open?id=1uXEuRB3xLEIXSkccDq9WujzIC9PtVhb1</a>
Short video – testimony of an Irish farmer – Michael Davoren	<a href="https://drive.google.com/open?id=1HnQZmOrjA0A618y7tFKn9Xc-NRgvXghu">https://drive.google.com/open?id=1HnQZmOrjA0A618y7tFKn9Xc-NRgvXghu</a>
Technical activity report – RM	<a href="https://drive.google.com/open?id=1PahUPDwl54hgXcFwj7HD689x8I4ioIn1">https://drive.google.com/open?id=1PahUPDwl54hgXcFwj7HD689x8I4ioIn1</a>



#### 4. Dissemination & communication activities:

*In line with its HNV Vision and its "identified innovation needs" each LA will draft a "Dissemination and communication action Plan". Those innovation brokerage activities will be envisioned in complementarity with the "Cross Visits" and the Regional Meetings.*

*This plan encompasses both the nature of the C&D itself (what kind of communication/dissemination methods can be used/what materials/what budget/what agenda) and the C&D strategic process (actors, successes and failures, etc.): What are ALL the key target groups that the LA should reach (in ideal world)? Which of these the LA reached at the innovation seminars? Which are still missing?*

*Three levels of dissemination:*

*Local/regional Actors – directly involved in the innovations transfers – grassroots*

*AKIS – go back to the AKIS*

*Broader Audience –*

As planned during the 2nd Network meeting in Évora, the target for the dissemination plan of the Sítio de Monfurado was focused on how to valorize the importance of Montado and at the same time reward the owners according to the ecological values of Montados. The LA felt that the results-based approach to delivering environmental benefits will address both aims. Having in mind the above aim, we have developed actions to communicate the Baseline assessment, the Innovation report and particularly the main objective for the using phase – The process of innovation transfer to the LA. As stated before, the main target for innovation transfer within the LA Sítio de Monfurado relates to the construction of a mixed (result-based and action-based) scheme of agro-environmental measures to support the sustainability of the Montado, inspired in the Burren program. The dissemination actions were developed at three levels, as follows:

*Local/regional actors:*

- Dissemination of the project brochure in different events related to the Montado (mostly at the University of Évora/ICAAM)- scientific events, meetings with farmers and with administration, meetings promoted by different research projects.*
- Dissemination of the project outcomes through the initiative "Tertúlia do Montado" that gathers producers researchers and public administration at the regional level.*
- Establish a regular dialogue (parallel to that of the initiative Tertúlia do Montado) with a group of regional and national stakeholders from the Montado engaged on the process of construction of a pilot results based program for the Montado.*



- *Provide press-releases on the different events organized to feed the regional and national press.*
- *Promote working meetings with local actors/takeholders of the Montado*

*National actors:*

- *Dissemination of the project outcomes and events through the National Rural Network (news and interviews)*
- *Writing up of articles for publishing in National magazines (eg. Vida Rural, Montado fair magazine)*
- *Participation in National workshops and meetings both scientific and technical.*

*Broader audience:*

- *Participation on international conferences to disseminate and communicate the project results*
- *Feed the communication media of the HNV-Link project*



## 5. Conclusion: Strategic Innovation Brokerage to support HNVf

*At the end of the Using Phase, a short questionnaire will be sent to all LA coordinators and will be followed by an bi-lateral interviews with WP4 leader, to harvest their experience as “innovation brokers “ for HNV area and assess the usefulness of the methodology proposed by HNV-Link network. These exchanges will be used to build the conclusion of the Action Plan.*

*Possibility of Cross Reviews ?*

The work developed across the HNV-Link project and particularly during the using phase enabled the construction of a multiactor group of stakeholder engaged in the sustainable management of Montado and particularly engaged in the process of construction of a pilot programme of results-based agro-environmental measures for the Montado. The University of Évora through ICAAM has worked as a broker in this process. Interactive innovation has good conditions to emerge when different and complementary knowledge, perspectives and skills are combined in a process where all involved feel empowered. The multi-actor process we experienced reflects one of these situations – researchers took the lead as initiators of the process, and continue coordinating, but the result-based program for the Montado has, step-by-step, been appropriated also by farmers and the staff from the central and regional administration. The platform facilitated by the HNV-Link project established the frame for this to happen. In this case, there was a fortunate combination of HNV-Link with the on-going initiative of a bi-monthly regular discussion meeting of Montado stakeholders, facilitated by a researcher in ICAAM, and an already long history of science-practice interface within the Montado in Alentejo. Competitive research funding is a supporting mechanism, but long term investment outside of these projects is a pre-condition for the co-construction to take place, especially concerning the management of such a complex system as the Montado.

