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# 生态学报 (SHENTAI XUEBAO)

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封面图说: 遗鸥群飞来——遗鸥意即“遗落之鸥”(几乎是最后才被发现的新鸥种,因此得名)。1931年,瑞典动物学家隆伯格撰文记述在中国额济纳采到了标本。1987年,中国的鸟类学家在鄂尔多斯的桃力庙获得了一对遗鸥的标本。1990年春夏之交,发现了湖心各岛上大量的遗鸥种群。近年来的每年夏季,大约全球90%以上的遗鸥都会到陕西省神木县境内的沙漠淡水湖-红碱淖上聚集。遗鸥——国家一级重点保护、CITES附录一物种。

彩图提供: 陈建伟教授 国家林业局 E-mail: cites.chenjw@163.com

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## 湿地退化研究进展

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**摘要:**受经济发展、城市扩张、气候变化的影响,湿地退化已经成为全球性现象,是当前国际湿地科学前沿领域的热点。从湿地退化标准、退化特征、退化分级、退化过程、退化机理、退化监测体系、退化评价指标与指标体系、退化监测新技术及其生态恢复理论与技术9个方面系统地介绍了当前湿地退化研究进展。结果表明湿地退化过程、退化机理、退化评价指标体系和退化湿地监测、恢复与重建研究是当前研究的重点,在未来相当长的时间内,全球气候变化、湿地退化的微观过程与机理、湿地生态系统的可持续利用将会是重要的研究方向。最后就我国当前湿地退化研究存在的问题进行了分析,并提出近期湿地退化研究亟待开展的11项研究工作,供我国湿地退化研究工作者参考。

**关键词:**湿地;退化过程;退化机理;湿地监测;评价指标;湿地恢复

## Recent advances in wetland degradation research

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**Abstract:** During the 21st century, economic development, urbanization and global climate change have caused the degradation of wetlands. This global problem has become a major research focus of present wetland science. Wetland degradation was also the main topic of the international wetlands conference held nearly 10 years. Research on wetland degradation has rapidly developed to form a large body of work; however, a unified theoretical framework has yet to emerge. There are still many questions that should be investigated, even if there is no uniform concept of wetland degradation. In China, study of wetland degradation has developed relatively slowly, and there has been a lack of quantitative, in-depth research. In this paper, we discuss the concept of wetland degradation and review the recent advances that have been made in wetlands degradation research in nine areas: wetland degradation standards, degradation characteristics, classification of degradation, degradation process and mechanism, index system for degradation monitoring, index system for degradation assessment, new technology for degradation monitoring, ecological restoration theory and technology of degraded wetlands. We also analyze current problems of wetland degradation in China and propose areas for future research. The findings from research show that the process and mechanism of wetland degradation arise from synergistic impacts of multiple stress factors. This includes climate change impacts on biogeochemical wetland processes, especially the nutrient cycling process, and on hydrological wetland processes at the catchment scale, particularly from rising sea levels. Theory and practice of wetland management for restoration and reconstruction, wetland degradation assessment and monitoring technology, wetland degradation assessment indexes and identification of stress factor intensity thresholds during wetland degradation have all

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been active areas of current research. Limitations of the present research on wetland degradation research in China include lack of deep understanding of the wetland degradation process and mechanism, imbalance in research intensity among geographic regions, failure to use modern research methods, lack of communication among researchers, lack of advanced theory and practice of degraded wetlands restoration. Accordingly, we suggest wetland degradation research should have the following aims: 1) to strengthen long-term, systematic study of wetland degradation; 2) to investigate the processes and mechanisms of wetland degradation, specifically using quantitative methods; 3 ) to encourage sharing of information and academic resources; 4) to strengthen basic research of degraded coasts, estuaries, lakes and plain wetlands and develop detailed theories and methods so as to play their exemplary role to the outlying geographic regions; 5) to apply the latest technologies; 6) to enhance communication with other disciplines; 7) to investigate the mechanisms of changes in biogeochemical processes of degraded wetland arising from the impacts of climate change and human disturbance; 8) to strengthen research on the sustainable use of wetland ecosystems; 9) to strengthen research on hydrological processes of degraded wetlands at the watershed scale; 10) to strengthen research on wetland degradation assessment; 11) to research important technologies for wetland restoration. We aim to promote wetland conservation, and stimulate research on wetland degradation and restoration as well as scientific management of degraded wetlands in China.

**Key Words:** wetlands; degradation process; degradation mechanism; wetland monitoring; assessment indicators; wetland restoration

21世纪以来,受经济发展、城市化过程、气候变化影响,湿地退化已成为一种全球现象,是近10 a来国际湿地学术会议的主要议题之一<sup>[1]</sup>。20世纪70年代以前有关湿地退化研究仅将湿地作为水禽和其他动物栖息地<sup>[2-3]</sup>或作为水源地<sup>[4]</sup>或作为生态环境的一部分<sup>[5]</sup>而对其退化特征作定性描述。伴随着20世纪80年代以来湿地科学的研究的蓬勃发展,湿地退化日益加剧,湿地退化研究开始兴起<sup>[6]</sup>,但是该领域研究进展一直缓慢。20世纪90年代之后,在天然湿地大量丧失的情况下,才真正开始现代湿地退化研究并迅速形成诸多研究领域,包括湿地退化过程与机理、退化评价、退化分级、退化指标与指标体系、退化湿地管理、退化湿地遥感监测、退化湿地恢复和重建等,其热点研究区域集中在美国佛罗里达州大沼泽地 Everglades、欧洲莱茵河流域 Rhine River,东非维多利亚湖 Lake Victoria、北美五大湖(苏必利尔湖 Lake Superio、密歇根湖 Lake Michigan、休伦湖 Lake Huron、伊利湖 Lake Erie 和安大略湖 Lake Ontario)、巴西潘塔纳尔沼泽地 Pantanal 等世界重要湿地,其中尤以美国佛罗里达州大沼泽地的湿地退化过程与机理研究最为深入,探明了来源于农业施肥的磷污染是大沼泽地退化的关键胁迫因子并确定了其强度阈值<sup>[7]</sup>,我国至今尚缺少这样定量、深入的湿地退化研究。尽管我国湿地退化研究起步较晚,总体来说要晚于草地、森林其他生态系统退化研究,但发展比较迅速,目前在湿地退化各个研究领域均有涉猎,热点研究区域主要包括东北三江平原沼泽湿地、四川若尔盖高原湿地、黄河三角洲湿地、青海三江源湿地、辽河三角洲湿地、云南纳帕海湿地、内蒙古乌梁素海湿地、东南沿海滨海红树林湿地以及太湖、洞庭湖、白洋淀等湖泊湿地。迄今我国已有较多有关湿地退化的综合研究<sup>[8-14]</sup>,而且也有学者就湿地退化的标准<sup>[15]</sup>、湿地退化评价<sup>[16-17]</sup>、退化湿地监测体系<sup>[18]</sup>等方面的研究进行过评述,但限于论文主题限制,对湿地退化进展方面尤其湿地退化过程和机理等方面的阐述还需进一步扩展和深入。因此本文对当前湿地退化研究内容进行系统归纳,从湿地退化标准、退化特征、退化分级、退化过程、退化机理、退化监测体系、退化评价指标与指标体系、退化监测新技术及其生态恢复理论与技术九个方面,阐述当前湿地退化最新研究进展,旨在推动我国湿地保护、退化湿地生态恢复与重建以及退化湿地管理工作的深入。

## 1 湿地退化概念的探讨

目前有关湿地退化的概念尚未统一。美国 Minnehaha 流域管理委员会将湿地退化界定为:湿地退化是由于人类活动的影响而使湿地只能提供最小的功能和价值的变化。美国国家食物安全行动指南中将湿地退化定义为:湿地退化是指由于人类活动的影响致使湿地的一种或多种功能受损、减弱或破坏<sup>[19]</sup>。张晓龙等<sup>[15]</sup>

将湿地退化定义为:由于自然环境的变化,或是人类对湿地自然资源过度地以及不合理地利用而造成的湿地生态系统结构破坏、功能衰退、生物多样性减少、生物生产力下降以及湿地生产潜力衰退、湿地资源逐渐丧失等一系列生态环境恶化的现象。

湿地退化是指由于在不合理的人类活动或不利的自然因素影响下使湿地生态系统的结构和功能不合理、弱化甚至丧失的过程,并引发系统的稳定性、恢复力、生产力以及服务功能在多个层次上发生退化。在这一过程中,系统的结构和功能均发生改变,能量流动、物质循环与信息传递等过程失调,系统熵值增加,并向低能量级转化。相比原生湿地,退化湿地应具有如下特征:生物群落生产力降低、生物多样性下降;土壤有机质含量下降、养分减少、土壤结构变差;水体富营养化、水位降低、水域面积减小以及水分收支平衡失调等。因此湿地退化包含了三个重要部分,分别是生物、土壤和水体的退化,这三部分相互影响、相互制约,并最终导致湿地最为重要的标志——湿地生态环境功能的退化。

## 2 湿地退化研究进展

### 2.1 湿地退化标准

湿地退化标准是对湿地退化状态进行界定的过程,制定科学、合理的退化标准是湿地恢复与重建的前提和基础。目前有关湿地退化标准还在发展完善过程中。张晓龙等<sup>[15]</sup>认为湿地退化标准应该包括湿地面积、组织结构状况、湿地功能、社会价值、物质能量平衡、持续发展能力、外界胁迫压力等方面。O'Connell<sup>[20]</sup>从湿地生态特征变化的角度对湿地退化标准进行了表述,将湿地生态特征变化定义为维持湿地的产品、属性和结构的湿地过程或功能的损害或不平衡,并建议从以下方面进行考虑:1)湿地面积(生境丧失);2)水文条件;3)水质;4)非持续性资源利用状况;5)外来物种入侵。实际上除以上生态特征外,湿地处理污水、碳储存、为野生动物提供栖息地等功能特征以及社会服务、旅游等服务特征也都应被视为湿地退化的标准<sup>[21]</sup>。因此湿地退化标准应该包括湿地本质属性特征和生态环境功能特征,并且各种类型湿地退化标准度量应存在一定差异。

### 2.2 湿地退化特征

#### 2.2.1 湿地退化水文特征

湿地退化水文特征通常表现为水文周期和水位的变化。当前在气候变化和人类活动的影响下,大部分退化湿地都存在地表水与地下水位下降的问题<sup>[22]</sup>。湿地退化水文特征还表现为湿地补给水源、水文物理性质(含水量、持水能力、水分和毛细管运动、热力状况与蒸发作用)与水分运动(毛管运动与渗透过程)、径流和地表水平衡等方面的变化,这也是当前该领域重点研究内容<sup>[23-25]</sup>。

#### 2.2.2 湿地退化土壤特征

土壤退化首先表现为有机质、腐殖酸、容重、孔隙度、营养元素等理化特征的改变。美国佛罗里达州Everglades湿地在20世纪40年代被开垦为放牧场,土壤退化严重,与开垦之前相比,退化湿地全磷、全氮和碳含量均大幅减少<sup>[26]</sup>。其次土壤碳固存和吸附污染物等功能特征的研究也日益受到重视<sup>[27-28]</sup>,研究指标也趋多样化,如土壤酶和土壤微生物等生化指标的应用<sup>[29-30]</sup>,为湿地退化土壤特征研究开辟了新领域。

#### 2.2.3 湿地退化植物特征

大型水生维管植物是湿地生态系统结构和功能维持的关键组成部分。在湿地退化过程中,植物生理过程<sup>[31]</sup>以及群落高度<sup>[32]</sup>、生产力<sup>[33]</sup>、种群繁殖方式<sup>[34]</sup>和种间关系<sup>[35]</sup>等生物生态特征均会发生退化,并且植物退化特征与湿地类型密切相关。对于沼泽湿地,由于过度放牧和排水疏干等人为活动干扰,原生湿地植物群落退化为杂类草群落,无论是种类的数量还是个体的数量均极大降低,使植物群落趋向同质化<sup>[36]</sup>。对于浅水湖泊湿地(水深<4 m),由于湖泊富营养化而造成植物退化特征突出表现为浮游植物或大型水生植物的过量生长,使湖泊向“藻型湖”<sup>[37]</sup>或“草型湖”<sup>[11]</sup>退化。目前,植物群落退化与湿地退化关系的综合研究成为重点。

#### 2.2.4 湿地退化动物特征

湿地退化动物特征研究主要集中在动物种类和丰度的变化,其变化特点依退化原因有别。排水疏干导致

湿地退化突出的特点是湿地动物种类减少,数量下降,陆生动物种类增加,数量增多<sup>[38-39]</sup>。污染胁迫下,湿地耐污染的种类保存下来,对污染敏感的种类消失<sup>[40]</sup>。湿地退化动物特征研究的另一个特点就是其研究对象由传统的水禽、鱼类等大型湿地动物向昆虫、浮游生物等小型生物转变,这些小型生物类群是湿地生态系统生产力主要构成部分,处于食物链底端,决定着大型动物的种群数量,即“上行控制效应”<sup>[41]</sup>。

### 2.2.5 湿地退化功能特征

湿地具有17种生态环境功能<sup>[42]</sup>,湿地退化最严重后果是湿地生态功能削弱、甚至消失,危及人类生存环境,影响人类生态安全。伴随湿地生态系统退化,首先大型维管植物的生产力和养分吸收能力下降,从而削弱湿地的水质净化功能<sup>[21]</sup>。其次湿地蓄洪能力降低,水文调节功能削弱,导致洪灾频繁发生。最后土壤侵蚀和植被丧失将会进一步降低湿地社会经济功能<sup>[43]</sup>。此外,气候变化将对湿地固碳功能产生重大影响,有证据表明,在未来全球气温上升的背景下,温带北方泥炭地非生长季碳排放通量将会增加,影响泥炭地CO<sub>2</sub>年度收支平衡<sup>[44]</sup>。

### 2.3 湿地退化分级

不同类型湿地生态特征各异,难以制定统一适用的湿地退化分级标准,分类指标选取也没有达到共识,往往是制定出某一区域的湿地退化分级,世界各国都还没有公布各自国家湿地退化的分级方法和分级方案。已有的湿地退化分级大多根据土壤、水质、水文、植被、景观等特征定性的进行划分。目前随着湿地微观特征研究的深入,确定了不同退化湿地的阈值,很多学者提出了定量分级方法,并制定一些适合研究区域的分级方案。常用有以功能评价为基础的水文地貌法(HGM法),在地理尺度上对退化湿地进行定量、一致的评价,Brison等学者在这方面作了较多的开创性工作<sup>[45-47]</sup>,目前该方法被诸多学者广泛采用<sup>[48-50]</sup>。此外还有Cohen<sup>[51]</sup>等基于植被分类树快速评价法评价湿地状况;Jacobs<sup>[52]</sup>等基于生态数据对湿地退化状况进行了分级。国内有崔保山<sup>[53-54]</sup>对三江平原湿地退化状况进行了分级;王树功<sup>[55]</sup>等应用健康指数对我国珠江口红树林湿地健康状况进行了定量分级;蒋卫国<sup>[56]</sup>等对辽河三角洲湿地健康状况进行了分级。目前对综合运用水文、植被、土壤等多种系列指标进行定量分级方法还未见报道,但是,毫无疑问这是湿地退化分级的发展趋势。

### 2.4 湿地退化过程

#### 2.4.1 水文过程

水文过程是湿地退化的主要标志和直观体现。水文退化过程主要影响湿地径流、蒸散和降水截流,改变湿地的水补给方式和水循环动态,这也是湿地-大气界面水文过程研究的热点和重点<sup>[57]</sup>。此外,国际上还注重应用各种水文物理模型描述水文过程的变化,诸如 MODFLOW 模型<sup>[58]</sup>,FEUWAnet 模型<sup>[59]</sup>、水文变异函数<sup>[60]</sup>等。但目前在湿地水文学中,如何从特定地点的定位研究扩大到流域尺度,仍是当前研究的挑战所在<sup>[61]</sup>。

#### 2.4.2 生理生化过程

生理生化过程是揭示湿地植被和土壤退化微观过程的突破口之一,也是对湿地退化进行定量分级的基础。目前主要研究湿地退化过程中植物生理生化过程和土壤生化过程的变化,包括湿地优势植物营养元素吸收<sup>[21, 62]</sup>、光合作用<sup>[63]</sup>等植物生理生化过程,以及土壤酶活性<sup>[29, 64]</sup>、有机碳组成和氧代谢<sup>[65]</sup>等土壤生化过程。

#### 2.4.3 生物过程

在湿地生态系统中,生物过程主要表现为生物群落的初级、次级生产和土壤污染物的生物降解过程。当湿地水文条件发生变化时,生物过程也将随之改变。有研究表明地下-地表水相互作用将对底栖无脊椎生物的丰度、物种数和生产力产生显著的影响,地下水位高的湿地具有更高的物种数和丰度<sup>[66]</sup>。滨海盐沼湿地受原油污染、农药残留影响严重,对这些化学污染物的生物降解过程也较为重视,已在东南亚地区退化红树林湿地开展相当多研究<sup>[67-69]</sup>。

#### 2.4.4 生物地球化学过程

生物地球化学过程是湿地退化研究的重点,主要包括湿地生态系统营养元素的吸收、积累、分配及归还、

凋落物分解、沉积物、温室气体排放和碳负荷量、生产力、重金属污染、微量元素的生产和消费以及量化模型等<sup>[65, 70-73]</sup>。其中,泥炭沼泽凋落物分解过程是生物地球化学过程研究的一个重点领域,包括凋落物分解率随时间变化的定量模型、凋落物分解的主要控制因素等<sup>[74]</sup>。磷作为淡水湿地的限制性营养元素,其循环及沉积过程也是当前研究的重点<sup>[75-76]</sup>。此外,气候变化对生物地球化学过程的影响也颇受重视,在暖干气候影响下,一些元素的“源”“库”角色将发生转换<sup>[77]</sup>,从而深刻影响湿地生物地球化学循环过程。

## 2.5 湿地退化机理

### 2.5.1 人为因素

#### (1) 生物学机理

在湿地退化过程中,人为活动主要通过改变原生湿地植物种间关系<sup>[35]</sup>、导致外来种入侵<sup>[78]</sup>、减少动物和土壤微生物种类和数量<sup>[38]</sup>、改变生态系统营养结构<sup>[79]</sup>等方式导致湿地生态系统退化。其中外来种的他感作用在当前研究中受到较多关注。Gopal<sup>[80]</sup>曾归纳水生生物群落中的几种主要的作用机制,指出他感作用、种间竞争是其中最重要的两种机制(图1)。在滨海湿地生态系统,入侵植物互花米草(*Spartina alterniflora*)能够分泌他感物质影响其他植物生长,从而改变群落结构、功能,导致湿地退化<sup>[81-82]</sup>。Jarchow<sup>[83]</sup>的研究表明北美的外来种狭叶香蒲(*Typha angustifolia*)也具有强烈的他感作用,降低本地种 *Bolboschoenus fluviatilis* (块茎藨草属一种)的叶长、根、茎和总生物量。目前已发现在湿地生态系统中他感作用广泛存在。

#### (2) 土壤学机理

在湿地退化过程中,土壤退化扮演着重要角色。土壤有机质、营养元素含量变化<sup>[84]</sup>及其与植物、土壤动物、微生物、真菌等各生物类群之间的相互关系<sup>[38, 85-89]</sup>是当前土壤退化机理研究的主要内容。但对于不同湿地类型,土壤退化机理不尽相同。在过度放牧和开采泥炭等人为活动干扰下,泥炭沼泽湿地土壤结构和功能发生改变,湿地地表趋干,土壤有机质分解加速,土壤酶活性降低<sup>[8, 90]</sup>。对于滨海湿地生态系统,由于石油开采导致湿地土壤受到有机物污染,从而改变植被发育环境条件,减少动物栖息地,导致湿地发生退化<sup>[91]</sup>。

#### (3) 生态学机理

湿地退化的生态学机理研究主要包括生物群落结构、演替、种群存活率、物种多样性、生态位等内容,其中物种生态位是核心研究内容。在湿地生物群落中,物种生态位往往因水体化学性质和地下水位而发生变化,从而影响湿地生物群落的物种构成和功能<sup>[92]</sup>。当前鉴于人为活动导致天然湿地日益破碎化<sup>[93-94]</sup>,使大量物种灭绝,科研人员亦开始研究破碎化生境中物种迁入-迁出等空间动态过程,以揭示湿地退化机理。Cushman<sup>[95]</sup>研究发现,短期条件下生境破碎化主要影响两栖类幼体在局域生境之间的迁移,但对于扩散能力弱的种类在长期条件下成体也会受到严重的影响。Lehtinen 研究也表明两栖类物种丰富度与生境破碎化程度呈负相关关系<sup>[96]</sup>。

#### (4) 生物地球化学机理

生物地球化学过程是揭示湿地植物群落和土壤退化的重要研究途径之一,有助于进一步明确物质循环过程在湿地生态系统退化中的功能。生物地球化学过程主要通过影响营养元素的吸收、循环、累积,进而影响植物群落和土壤的理化性质,改变湿地对营养元素的吸收和净化作用,导致湿地功能下降<sup>[72]</sup>。莱茵河湿地的一项研究表明,在水生环境中,可利用磷的浓度控制着植被生物量的生产,在磷浓度为 5  $\mu\text{mol/L}$ (相当于 0.154  $\mu\text{g/L}$ )的时候大型沉水植物开始消失,浮叶植物(浮萍等)开始出现,在磷浓度超过 10  $\mu\text{mol/L}$  或(相当于 0.308  $\mu\text{g/L}$ )时,浮游植物(绿藻和蓝藻)开始出现<sup>[97]</sup>。在美国大沼泽地 Everglades 研究中发现,来源于农业

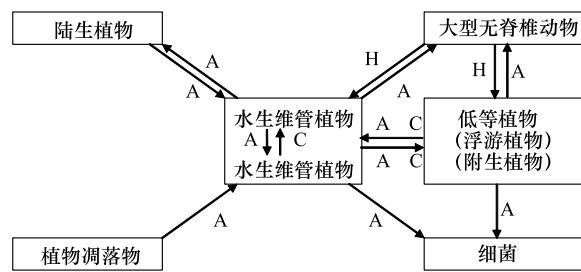


图 1 水生生物群落主要相互作用的概念图<sup>[80]</sup>

Fig. 1 Conceptual diagram of major interactions in aquatic communities<sup>[80]</sup>

A: 他感作用;C: 竞争作用;H: 食草作用

面源污染的磷元素是湿地退化的关键胁迫因子,水体中总磷浓度12—15 μg/L为胁迫强度阈值,超过此阈值,将引起藻类、水生维管植物和大型无脊椎动物的生态平衡失调<sup>[7]</sup>。其他类型湿地植被中也都观察到类似的现象,或受到磷的限制,或受到氮的限制,或二者兼而有之<sup>[98]</sup>。由此可见,开展湿地生物地球化学过程的定量化研究对揭示湿地退化机理具有重要意义。

## 2.5.2 自然因素

### (1) 新构造运动

新构造运动是导致自然湿地退化的关键诱因之一。新构造运动通过地壳隆起、沉降作用和河流侵蚀作用从而显著地控制地形和水系格局的形成,使湿地趋向自然疏干,发生退化。欧洲潘诺尼亚盆地(Pannonian Basin)<sup>[99]</sup>和匈牙利平原<sup>[100]</sup>的天然湿地即在新构造运动的抬升作用下呈现旱生化的趋势。在我国,新构造运动上升也加剧了高原湿地退化。有研究表明新构造运动是造成黄河源区生态环境恶化的主导因素<sup>[101]</sup>。在若尔盖高原沼泽湿地退化研究中也发现新构造运动是高原湿地退化的主要原因之一<sup>[8-9, 102]</sup>。目前,新构造运动与湿地退化关系已成为湿地退化研究的一个新的生长点。

### (2) 气候变化

气候变化是目前国际湿地退化研究的另一个热点领域。气候变化主要影响水体生物地球化学过程(包括碳动态)、水生食物网结构、动态和生物多样性、初级、次级生产以及水文过程<sup>[22, 103-104]</sup>。不同类型湿地,包括河流洪泛区、红树林、盐沼、北极湿地、泥炭地、淡水沼泽和森林湿地等,对气候变化具有不同的响应<sup>[105]</sup>。有研究表明,气候变化改变了我国白洋淀湖泊湿地水文特征,减少湿地水文补给、增加水分消耗,从而使湿地面积萎缩,发生退化<sup>[106]</sup>。对于滨海湿地生态系统而言,更为重要的是由气候变化引起的海平面上升所带来的间接负面影响<sup>[107]</sup>。有证据表明海平面上升将增加海水盐度,减少沉积物和有机质积累,进而影响滨海湿地植物和动物多样性,使湿地退化<sup>[108]</sup>。

## 2.6 湿地退化监测体系

构建湿地退化监测体系,对于掌握湿地退化动态、制定合理的管理措施、发明科学的恢复技术具有重要的参考价值和指导意义。完善的湿地退化监测体系不仅要体现湿地环境特征,还应该包括生物特征以及景观特征,科学选取各特征的主要指标,建立湿地退化监测体系。环境特征包括湿地水文<sup>[109]</sup>、水质<sup>[110]</sup>、土壤<sup>[30]</sup>等;生物特征通常选取指示生物类群,目前国际学术界较为关注两栖类<sup>[40]</sup>、鱼类<sup>[111]</sup>、鸟类<sup>[112]</sup>和大型维管植物<sup>[23]</sup>;景观特征应结合3S技术,监测湿地宏观特征诸如湿地面积<sup>[20]</sup>、植被特征<sup>[113]</sup>、流域特征<sup>[114]</sup>的变化,以建立完整易行的生态监测体系。

## 2.7 湿地退化评价指标与指标体系

目前湿地退化评价指标与指标体系正在逐步建立过程之中,虽然还没有建立完善的指标体系,但是已经取得很多新进展。在现有的评价指标中,大体可分为生物指标、土壤指标、水体指标和景观指标等,近年又提出应用社会经济指标<sup>[115]</sup>评价湿地的退化,使湿地退化评价指标范围更广,几乎涵盖了湿地生态系统的各个方面。在当前研究中,较为系统、完整的定量评价指标有Chow-Fraser等人在加拿大劳伦森大湖(Laurentian Great Lakes)湿地所做的工作,提出了一系列的定量化湿地退化评价指标,包括水质指数(WQI)、水生植物指数(WMI)、湿地鱼类指数(WFI)和湿地浮游动物指数(WZI)等,这些指标既有水体指标又有生物指标<sup>[116-119]</sup>。此外,国际上常用的还有基于生物完整性指数(IBI)的评价指标,该指标从湿地的植物和动物的角度来确定湿地退化的程度及阈值,其最初源于鱼类群落生物完整性指数,此后被应用于各种生物类群,包括植物<sup>[120]</sup>、两栖类<sup>[121]</sup>和鸟类<sup>[122]</sup>等。此外Johnston<sup>[123]</sup>利用10个环境连续变量指标(水深、草丛高度、纬度、经度、草本枯落物、木本植物枯落物、浮木、裸地、褐苔和开阔水域)评价了90个美国滨海湿地植被退化状况;Spencer<sup>[124]</sup>则利用植被、土壤、水体的13个指标建立了退化湿地生态系统的快速评价指标体系。我国近年在这方面研究也取得了重要进展。对黄河三角洲滨海湿地、三江平原湿地、云南纳帕海湿地等均开展了湿地退化评价研究<sup>[53-54, 125-126]</sup>。

## 2.8 退化湿地监测新技术

### 2.8.1 湿地遥感

遥感是退化湿地监测的重要技术手段,目前国际上湿地遥感监测研究表现出监测范围扩大、监测手段更新、监测时间增长的特点<sup>[127-128]</sup>。合成孔径雷达(SAR)技术成为遥感监测研究新的生长点<sup>[129]</sup>,并且部分长期监测的地区已经进行高光谱遥感的谱库建设<sup>[130]</sup>,这对于进一步精确化湿地退化监测具有重要意义。

### 2.8.2 湿地环境监测

各种多参数湿地水环境自动监测仪器(Hydrolab, YSI等)、采样仪器和湿地自动气候观测站极大的增强人们对湿地退化过程和机理的深入理解,在野外无人区也有可能实现连续取样监测。原状土连续就地取样技术(*In-situ*技术)为退化湿地土壤监测提供了有力的工具<sup>[131]</sup>,稳定同位素示踪技术的应用使得对退化湿地水文过程<sup>[132-133]</sup>及生物地球化学过程<sup>[75, 134]</sup>的理解也更加深入。

### 2.8.3 湿地植被监测

监测湿地植被动态对科学制定湿地恢复和管理措施极为重要,其监测手段主要有卫星遥感和野外实地定点定时调查。卫星遥感技术可为植被监测提供及时、最新、相对准确的信息,其最新发展趋势是将高光谱和多光谱遥感技术用于湿地植被监测<sup>[135]</sup>。此外在海洋赤潮监测中应用较多的星载海洋彩色传感器在将来也可能被广泛用于湿地植被监测<sup>[136]</sup>。但遥感技术缺陷之一就是分辨率较低,需要在空间分辨率和光谱分辨率之间做出权衡并选择适当的植被光谱信息提取处理技术。因此近年有研究者倾向于采用彩色红外航拍技术进行湿地植被监测<sup>[137]</sup>,该方法具有更精确的分辨率,能更详细的监测植被变化,兼具野外实地调查和遥感卫星影像的优点,但在数据分析上具有费时、花费高的缺点,因此与遥感技术的结合使用可能是未来湿地植被监测的主要发展方向。

## 2.9 退化湿地生态恢复理论与技术

### 2.9.1 退化湿地生态恢复理论

退化湿地生态恢复研究历史较短,退化湿地成功恢复的例子相对较少,湿地恢复的理论体系还没有完全建立起来。Zedler<sup>[138]</sup>对有关湿地恢复理论做过较为全面的总结,认为湿地恢复应遵循以下几个理论:岛屿生物地理学理论、生态位理论、种群理论和营养级理论。彭少麟<sup>[139]</sup>认为在退化湿地的恢复过程中,可应用自我设计和设计理论、演替理论、入侵理论、河流理论、洪水脉冲理论、边缘效应理论和中度干扰假说等理论作指导。周进等<sup>[140]</sup>总结过泥炭地植被恢复过程中的有关理论。另外还有一些专著出版,其中代表性著作主要有 Middleton撰写的《湿地恢复——洪水脉冲和干扰动态》(Wetland Restoration, Flood Pulsing, and Disturbance Dynamics)及 Hey 和 Philippi 合撰的《湿地恢复案例》(A Case for Wetland Restoration),是湿地恢复理论的集中体现。目前湿地恢复理论还有待在大量的退化湿地成功恢复实践基础上进一步总结完善,在将来研究中,实现多学科合作将是退化湿地恢复成功的关键。

### 2.9.2 退化湿地恢复技术

#### (1) 退化湿地植被恢复技术

植被是湿地生态系统的“工程师”<sup>[141]</sup>,也是湿地恢复的重要组成部分。目前植被恢复技术手段多样,日益成熟,其中通过湿地土壤种子库进行天然恢复研究较受重视<sup>[34, 142-144]</sup>。此外,Kowalski 等<sup>[145]</sup>采用便携式围堰技术恢复伊利湖(Lake Erie)湖滨湿地挺水植被。Mäson<sup>[146]</sup>通过温室和田间试验方法,采用苔藓配子体片段进行沼泽湿地恢复。但不论采用哪种方式进行植被恢复,重要的是要了解物种的生活史及其生境类型,恢复生物避难所,这对于灾难性干扰后原生种群的存活与恢复至为重要<sup>[147]</sup>。我国近年在退化湿地植被恢复方面也进行了大量有益探索,尤其在黄河三角洲滨海湿地开展的植被恢复研究,已取得一些进展,出版了专著。

#### (2) 退化湿地土壤恢复技术

退化湿地土壤恢复技术主要是通过生物、生态手段达到控制湿地土壤污染、恢复土壤功能的目的。其中利用生物手段修复土壤污染较受重视,尤其在人口密度极大的滨海湿地生态系统应用更为广泛,如利用细菌

降解红树林土壤中的多环芳烃污染物<sup>[68]</sup>、利用超积累植物修复重金属污染土壤<sup>[73]</sup>。生态恢复主要在了解湿地水文过程、生物地球化学过程的基础上,通过宏观调控手段达到恢复土壤功能的目的,如通过调控水文周期或改变土地利用方式等以恢复湿地土壤水分状况,促进湿地土壤正常发育,加速泥炭积累过程<sup>[148]</sup>。但土壤生态恢复影响因素较多,恢复过程不易控制,Niedermeier<sup>[149]</sup>在研究泥炭沼泽湿地土壤恢复过程时发现,通过洪水冲积以恢复土壤肥力的传统做法将会因为氧化还原作用反而引起土壤养分的流失,增加水污染的风险。因此在恢复过程中需要对土壤的各种生物、物理、化学过程进行深入研究以制定合理方案。

### (3) 退化湿地水文恢复技术

水文过程决定了植物、动物区系和土壤特征<sup>[150]</sup>,是湿地恢复的关键。在水文恢复过程中,通常需要根据湿地退化程度及原因,采用外来水源补给等手段适当的恢复湿地水位,合理控制水文周期,并进一步运用生物和工程技术净化水质,去除或固定污染物,使之适合植物生长,以保持湿地水质。现在有些湿地科学家更提倡在流域尺度上进行退化湿地的恢复,在遵循原湿地水文特征的基础上,人工加以适当的辅助措施,从而在达到恢复水文、净化水质的目的。Mitsch 等人在美国密西西比-俄亥俄-密苏里河盆地进行了较多的湿地水文恢复研究,其中的“牛轭”设计研究是一个较为成功的例子,有效降低了水中硝态氮、总氮、可溶性活性磷和总磷的含量<sup>[151-153]</sup>。

#### 2.9.3 湿地退化恢复成功的标准

退化湿地恢复成功的标准研究相对较少,研究也不够深入,迄今为止退化湿地恢复成功的标准一直没有定论。如何判定湿地恢复成功学术界争论也很大。在湿地退化恢复成功标准中,以植物特征标准最为常用<sup>[154]</sup>,其次是动物<sup>[155]</sup>、土壤和水文特征以及营养盐浓度<sup>[156]</sup>等。目前在湿地恢复过程中,尽管某一具体特征,如植被生产力、动物区系和营养盐浓度等可以同天然湿地进行对比,但湿地的整体功能依然没有得到证实。正如 Kentula<sup>[157]</sup>论述的那样:“成功是一个不精确的术语,它意味着不同的事情、不同情况和不同的人。”湿地科学家当前面临的挑战就是如何认识和处理湿地恢复成功的不确定性。

### 3 我国湿地退化研究存在的问题及建议

湿地退化研究是 21 世纪世界各国湿地科学工作者面前最紧迫、艰巨的任务之一,当前有关湿地退化理论和退化湿地恢复技术研究发展迅速,研究深度与广度较 20 世纪均有很大增加。总的看来,国际湿地退化研究热点问题主要集中在以下几个领域:1)湿地退化的标准与退化湿地分级;2)多因子协同胁迫下湿地退化微观过程与机理;3)退化湿地生物地球化学过程尤其是气候变化下的物质循环过程;4)流域尺度上的退化湿地水文生态过程;5)全球气候变化及其导致的海平面上升对湿地退化的影响与响应;6)退化湿地的恢复与重建理论与关键技术;6)湿地退化评价方法与退化湿地的监测手段与技术;7)湿地退化评价指标与指标体系;8)湿地退化胁迫因子强度阈值。并且,在未来相当长的时间内,全球气候变化、湿地退化微观过程与机理、退化湿地恢复与重建理论与技术、湿地生态系统的可持续利用将会是重要的研究方向。

我国湿地退化研究起步较晚,在各个研究领域与国际均存在一定差距,目前存在的问题主要体现在以下几个方面:1)湿地退化过程与机理认识不够深刻。表现在以往大多为宏观、定性的退化过程与机理研究,而较少从生理生化过程、生物地球化学过程、土壤生物化学过程等方面开展退化微观过程与机理研究,阻碍了对湿地退化机理的深入认识;2)湿地退化研究的区域不平衡性。目前研究热点区域集中在三江平原沼泽湿地、滨海红树林湿地、黄河三角洲、辽河三角洲等湿地以及平原、滨海湿地,而高原湿地与山地湿地退化研究相对薄弱;3)湿地退化研究手段相对落后。目前湿地退化研究仍以人为获取退化信息为主,而对于先进的湿地环境在线监测仪器应用较少,导致无法获取连续的、高精度的湿地退化信息;4)湿地退化研究零散,系统性不强,阻碍重大科研成果产出;5)退化湿地恢复理论与技术欠缺,亟需探索出适合我国湿地退化实际情况的恢复理论和成熟的恢复技术。

当前我国湿地退化问题非常严重,尽管国家和地方政府近年已加大湿地保护力度,但整体湿地退化趋势依然没有得到遏制,湿地面积仍在不断萎缩,一些重要湿地生态退化、功能持续衰退,深入开展湿地退化相关

基础研究工作已迫在眉睫。同时我国湿地具有面积大、类型丰富(几乎涵盖了湿地公约的所有湿地类型)的特点,客观上为开展不同区域、不同纬度、不同退化原因的各种类型湿地的横向对比研究提高了可能,在借鉴国际湿地退化研究的先进理论和技术的基础上,加速我国湿地退化研究进展,可望实现湿地退化理论的重大突破以及国家“十二五规划”中“从源头上扭转生态环境恶化趋势”的战略目标。建议我国湿地退化研究短期内应加强以下11个方面的基础工作:1)加强长期、系统的湿地退化研究,建立退化湿地生态监测网络,加强湿地退化基础研究;2)加强湿地退化微观过程与机理及其定量化的湿地退化详细过程研究;3)加强资源、信息共享,扩大先进在线监测仪器的使用,加强连续的、详细的湿地退化信息获取;4)加强滨海、河口、湖泊、平原湿地退化基础研究,摸索成熟的理论和方法,为高原和边远地区湿地退化研究提供导向和示范作用,缩小区域不平衡性;5)加强湿地监测新技术和新手段的应用,加强湿地退化预警工作,建立完善的监测和观测体系;6)加强学科之间交流,借鉴其他学科的理论、技术与方法,推进湿地退化研究。如将草地生态系统的样带研究方法移植到湿地退化研究,在不同典型退化湿地类型开展控制实验研究(人工增温、氮沉降等),通过横向对比加深对湿地退化过程的理解和认识;7)加强气候变化和人为活动干扰下退化湿地生物地球化学过程的机制与模型研究;8)加强湿地生态系统的可持续利用研究;9)加强旨在恢复退化湿地的流域尺度的水文过程研究;10)加强湿地退化评价研究,针对评价结果,制定合适的湿地管理和保护措施;11)加强退化湿地恢复关键技术研究,开发行之有效的退化湿地恢复配套技术,实现各类退化湿地成功恢复。另外,在开展以上湿地退化基础研究和应用研究的同时,还有必要建立多边环境法规,完善和健全相关的法律、法规,根据每个区域内不同的退化类型制定相应的管理和研究任务,这对遏制当前严重的湿地退化趋势以及进一步的退化湿地恢复工作将具有重要意义。

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