

## The EBM Toolbox: Resources for the sustainable financing of marine protected areas

*Editor's notes: OCTO, the parent organization for The Skimmer and the EBM Tools Network, is currently working with the UN Environment Programme, the University of Queensland, The Nature Conservancy, WWF, and other partners to develop practical guidance on challenges in MPA practice, including effectiveness, sustainable financing, and climate change. Project partners recently surveyed marine conservation and management practitioners about tools and resources that they would recommend to help with these challenges. In this EBM Toolbox, we present some preliminary results from this survey, specifically tools and resources to assist with MPA financing, including the related work of business planning and benefit sharing.*

**Do you know of other relevant tools or resources, particularly tools/resources to assist with equitable benefit sharing? Do you have experience using any of the resources or tools below? Please let us know about [ebmtools@octogroup.org](mailto:ebmtools@octogroup.org). For the next phase of our research, we will be updating these initial results and gathering input from practitioners about their experiences using these tools and resources.**

### Part A: Tools and guides for business planning and sustainable financing of marine protected areas

#### **Catalog: BIOFIN Catalogue of Finance Solutions**

**Provider:** UNDP Biodiversity Finance Initiative

**Description:** This online catalog provides a comprehensive list of biodiversity finance instruments, tools, and strategies. Each catalog entry is a mechanism or "finance solution" and includes a brief description as well as links to guidance material or case studies.

#### **Guide: Conservation Finance Guide (2002 with updates in 2019 and 2020)**

**Provider:** Conservation Finance Alliance

**Description:** This guide and associated documents provide guidance on business planning for protected areas and how to implement specific finance mechanisms in seven different classes. Specific finance mechanisms include: biodiversity enterprise funds, biodiversity prospecting, carbon offset projects, debt-for-nature swaps, environmental funds, fiscal instruments, payments for watershed services, philanthropic foundations, bilateral and multilateral donors, extraction of non-renewable resources, tourism entrance and activity fees, tourism concessions in protected areas, and international public climate finance for biodiversity.

**For more information:**

- Watch two webinars on the associated white paper Conservation Finance: A Framework, which provides several frameworks to understand concepts associated with conservation finance and a taxonomy of conservation finance strategies and mechanisms (Webinar 1 and Webinar 2).

#### **Tool/Service: Eco2Fin (2015)**

**Provider:** Wolfs Company

**Description:** The Eco2Fin tool (proprietary to, and used in conjunction with, Wolfs Company) is a framework that uses an ecosystem services approach to identify sustainable finance mechanisms within the context of a protected area.

**For more information:**

- Use of Eco2Fin to analyze sustainable financing in Caribbean Islands is described here (short practice note) and here

(full report).

- Read about use of Eco2Fin in [Turks and Caicos Islands](#).

**Guide: Finance Tools for Coral Reef Conservation: A Guide (2018)**

**Provider:** Wildlife Conservation Society and Conservation Finance Alliance, in support of the 50 Reefs initiative

**Description:** Aimed at protected area managers and others charged with managing and financing reef conservation, this guide provides descriptions of 13 types of finance tools that have proven successful at, or have good potential for, supporting reef conservation and sustainable management.

**For more information:**

- View a series of webinars on the finance tools covered in the guide including an [overview webinar](#), a [webinar on tourism-related tools](#), and a [webinar on conservation trust funds and impact investing](#).

**Assessment Tool: Financial Sustainability Scorecard: for National Systems of Protected Areas (2007)**

**Provider:** UN Development Programme

**Description:** This scorecard helps governments, donors, and NGOs investigate and record the structural foundations and accounts of their protected area financing system to assess its current health and status and long-term trends. The scorecard is designed for national systems of protected areas but can be used by state, regional, and municipal systems and MPA networks.

**Guide: Financing mechanisms: A Guide for Mediterranean Marine Protected Areas (2021)**

**Provider:** BlueSeeds for the Co-managed No-Take Zones/MPAs project

**Description:** A continuation of the 2015 Sustainable financing of Marine Protected Areas in the Mediterranean: A guide for MPA managers (available [here](#)), this new guide, designed for Mediterranean MPA managers, provides a step-by-step approach to help MPA managers accurately plan their financial strategy and implement relevant and effective financing mechanisms adapted to their needs. While written for Mediterranean MPA managers, the mechanisms presented in the guide are useful and replicable globally.

**For more information:**

- Watch the [launch webinar for the guide](#).
- In conjunction with the guide, BlueSeeds released a [call in May 2021 for expressions of interest](#) to support Mediterranean MPAs in implementing visitor fees on their site. A call for expressions of interest for another mechanism presented in the guide will be launched later in 2021.
- BlueSeeds has also developed a new solution [BlueMooring.org](#) to help global MPA managers manage their moorings and get sustainable revenues from them. A [call for pilot and partner MPAs to adapt BlueMooring.org's functionality](#) was released in May 2021.

**Guide: Guide pour l'élaboration des Plans d'Affaire simplifiés pour les Aires Protégées (2012)**

**Provider:** Benjamin Landreau (Lead author) for FIBA (Fondation Internationale du Banc d'Arguin; now MAVA), RAMPAO (Network of Marine Protected Areas of West Africa), FFEM (French Global Environment Fund), and AFD (French Development Agency)

**Description:** This French language guide provides MPA managers with a simple, step-by-step approach to independently develop a simple business plan. The guide is accompanied by simplified spreadsheets that managers can complete and update on a regular basis. It has a focus on African PAs but is applicable globally.

**Overview: Marine Protected Areas: Economics, Management and Effective Policy Mixes – Chapter 4: Sustainable financing of marine protected areas (2017)**

**Provider:** OECD

**Description:** Book chapter that examines a range of financing instruments and approaches available for MPAs, ranging from traditional government budget and donor funding to user fees, taxes and fines, and payments for ecosystem services, among others.

**Tool: MedPLAN (2015, updated 2020)**

**Provider:** MedPAN, SPA/RAC, WWF (Owners); Vertigo Lab, BlueSeeds (Developers)

**Description:** This freely-available business plan tool developed by Vertigo Lab and updated by BlueSeeds helps MPA managers build their business plan and financial strategy. It is a series of Microsoft Excel spreadsheets containing formulas that allow MPA managers to build a business plan by reporting the financial data of their MPA. The tool assesses total annual costs for implementing the MPA management plan, present and future financial resources for the MPA, and the financing gap between estimated costs and financial resources. While developed for Mediterranean MPA managers, the tool is applicable

globally.

**For more information:**

- Video tutorials for conducting this work are available on the [MedPAN website](#).
- The tool can be freely downloaded [here](#) or [here](#).

**Guide: Practice Standards for Conservation Trust Funds (2020)**

**Provider:** Conservation Finance Alliance

**Description:** These voluntary Practice Standards for Conservation Trust Funds serve as a tool for improving the design, management, and monitoring and evaluation of Conservation Trust Funds (CTFs).

**For more information:**

- See a [range of Conservation Finance Alliance documents on CTFs](#)
- View a [range of Conservation Finance Alliance webinars on CTFs](#) including:
  - [Practice Standards For Conservation Trust Funds Webinar Series - Overview\(2021\)](#)
  - [Practice Standards For Conservation Trust Funds Webinar Series - Programs And Monitoring & Evaluation\(2021\)](#)
  - [Practice Standards For Conservation Trust Funds Webinar Series - Communications\(2021\)](#)
  - [Practice Standards for Conservation Trust Funds Webinar Series - Resource Mobilization\(2021\)](#)
  - [Seychelles' Conservation and Climate Adaptation Trust \(SeyCCAT\) with Angelique Pouponneau\(2020\)](#).

**Guide: Protecting Our Marine Treasures: Sustainable Finance Options for U.S. Marine Protected Areas (2017)**

**Provider:** US Marine Protected Areas Federal Advisory Committee

**Description:** This report focuses on a wide range of approaches to obtain external funding for MPAs. It covers funding vehicles such as friends groups, foundations, fiscal sponsorships, and other non-profit organizations. In addition, it covers sources of external financing such as philanthropic giving, bonds, environmental mitigation activities, penalties and settlements, taxes, fees, corporate support, competitive grants, tourism-based support, and international partnerships.

**For more information:**

- Watch a [webinar on the guide](#).

**Tool: Reef Support**

**Provider:** Reef Support

**Description:** Reef Support is a simple, customizable, fee-based tool to help MPA managers collect and sell marine park fees to visitors. It offers a safe way to receive money and provides access to a database of park visitors, a ticketing system, and the possibility to generate customizable financial reports.

**For more information:**

- View a [webinar on the tool](#).

**Guide: Sustainable financing of Marine Protected Areas in the Mediterranean: A guide for MPA managers (2015)**

**Provider:** MedPAN, RAC/SPA, WWF (Publishers); Vertigo Lab (Technical Partner)

**Description:** This guide, designed for Mediterranean MPA managers, provides readers with information for developing the financial strategy of their MPA and identifying successful financing mechanisms. A continuation of this guide Financing mechanisms: A Guide for Mediterranean Marine Protected Areas (available [here](#)) was published in 2021. While written for Mediterranean MPA managers, the mechanisms presented in the guide are useful and replicable globally.

## **Part B: Trainings and webinars for business planning and sustainable financing of marine protected areas**

**Training materials: Business planning for MPAs (2021)**

**Provider:** MedPAN, Brijuni National Park, and BlueSeeds

**Description:** As part of the MedPAN network training program, an online training session was held with nine Mediterranean MPAs in January-February 2021. This training alternated between five pre-recorded videos and individual meetings with each MPA to work on their specific case study. With the exception of the first Mediterranean context webinar, the video content is applicable to MPAs globally, and an equivalent training program is currently being developed for MPAs in Western Africa.

**For more information:**

- The teaching materials are freely available on the [MedPAN website](#).

**Training materials: Conservation Finance Training: Financing Sustainable Management of Marine and Coastal Biodiversity (2017)**

**Provider:** Blue Solutions

**Description:** Materials from this training course provide an introduction to the value of marine ecosystem services and the need for conservation finance to support marine and coastal management; opportunities and approaches for financing conservation of marine and coastal areas; and key features in establishing a conservation finance mechanism.

**For more information:**

- The live training will not be offered by Blue Solutions after 2021, but the training materials are freely available on the [Blue Solutions website](#).

**Webinar: Debt Conversions (2020)**

**Provider:** Conservation Finance Alliance

**Description:** This webinar discusses debt conversions (also known as debt for climate and nature swaps), a finance instrument that allows countries to reduce their national debt and reallocate funds for sustainable development and conservation projects.

**For more information:**

- See a [previous Conservation Finance Alliance webinar about a US\\$40 million initiative to promote ocean conservation based on debt conversions in up to 20 countries](#).
- See a [previous OCTO webinar on debt conversions for small island developing states, including an example from Seychelles](#).

**Webinar: An introduction to business planning for protected areas (2017)**

**Provider:** Government of Seychelles-UNDP-GEF Protected Area Finance (project work), OCTO (webinar host)

**Description:** This webinar outlines the importance of business planning for protected areas and how business plans can be used as tools to leverage financial support for conservation management. The presentation also provides an introduction to the components of business plans and a collection of over 45 examples of protected area business plans and guidelines.

**For more information:**

- Read more [about the project](#).
- View the [collection of over 45 examples of terrestrial and marine protected area business plans from around the world](#)

**Training: Sustainable Financing for Marine Protected Areas**

**Provider:** Coral Triangle Center

**Description:** This four-day course is an introduction to the concepts of sustainable financing and the range of tools and mechanisms available to support the long-term financing of MPAs.

## Part C: Additional conservation financing resources

**Report: Financing Nature: Closing the Global Biodiversity Financing Gap (2020)**

**Provider:** The Paulson Institute, The Nature Conservancy, and Cornell University

**Description:** This report makes the economic case for protecting and conserving nature and highlights nine policy and financing mechanisms that will secure new funding for biodiversity conservation or reduce the need for future spending through the reform of harmful subsidies.

**Guide: Innovations for Coral Finance (2017)**

**Provider:** Vertigo Lab for the International Coral Reef Initiative

**Description:** Aimed at stakeholders involved in coral conservation, this guide introduces seven innovative financing mechanisms for the protection of coral reefs across the world. These mechanisms, both public and private-led, are complemented by a presentation of innovative business models that could be implemented to enhance coral reefs conservation finance.

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