Yudi Herdiana

Funding Trends 2023: Tracking Grantmaking in Marine Area-based Conservation

Prepared by Our Shared Seas

November 2023

OurSharedSeas.com

Ellen Cuylaerts/Ocean Image Bank

Funding Trends 2023: Tracking Grantmaking in Marine Area-based Conservation

Lead Authors:

Emily Peterson, Forrest Lewis, Aaron Saliman (CEA Consulting and Our Shared Seas)

Contributors:

Seth Horstmeyer (Oceans 5), Chuck Fox (Oceans 5), Jonathan Kelsey (Bloomberg Ocean Fund)

Suggested Citation:

Peterson, E., Lewis, F., Saliman, A. "Funding Trends 2023: Tracking Grantmaking in Marine Area-based Conservation." Our Shared Seas. 2023.

Available online at:

www.oursharedseas.com/mabc-report-2023

This report was made possible with support from Oceans 5 and Bloomberg Ocean Initiative.

Contents

Executive Summary

The Kunming-Montreal Global Biodiversity Framework—adopted at the 15th Conference of the Parties to the UN Convention on Biological Diversity (CBD COP15) in December 2022—set forth the most ambitious global area-based conservation target to date. Target 3 calls for the protection of 30 percent of the world's ocean and land by 2030 (known as "30×30"). Another key milestone was subsequently reached in March 2023 when member states agreed to the United Nations High Seas Treaty to conserve biodiversity in areas beyond national jurisdiction (BBNJ)—which is considered a key tool in reaching 30×30 ocean conservation and protecting marine biodiversity.

Achieving the ambition of the 30×30 target will require a more than tripling in the protection of marine areas in seven years. The use of marine area-based conservation—including protected areas[1] and other effective area-based conservation measures (OECMs)[2]—is expected to rapidly accelerate in the coming years. Importantly, the Global Biodiversity Framework also calls for an equitable approach to area-based conservation by respecting the rights of Indigenous Peoples and local communities (IPLCs), who manage a significant portion of the world's marine and terrestrial habitats—and hold intrinsic cultural, traditional, and spiritual value to these lands and waters.

A significant scale-up in financial resources—and the equitable distribution of funding—are essential for the implementation of the Global Biodiversity Framework. Funding needed to protect 30 percent of the ocean is estimated at USD 9–12 billion per year, which is 9 to 12 times greater than current spending in Marine Protected Areas (MPAs) globally.[3] A resource mobilization effort of this scale requires an all-hands-on-deck effort, with active participation of the public, private, and philanthropic sectors.

To better understand the contribution of the philanthropic sector to these efforts, this report provides the most comprehensive mapping of philanthropic funding flows in marine area-based conservation. The purpose of the report is to provide baseline trends for funders and other stakeholders to understand the current philanthropic landscape and to support informed collaboration with partners across all sectors on the funding and implementation of the Global Biodiversity Framework.

A key finding of this report is that annual philanthropic funding for marine area-based conservation has nearly tripled in the past decade, to USD 122 million in 2022. This increase in funding is driven by long-standing funders in the space—such as the David and Lucile Packard Foundation, Gordon and Betty Moore Foundation, and Oceans 5—as well as new and expanded commitments in recent years, including from Bloomberg Philanthropies, Oceankind, and the Bezos Earth Fund, among others. Still, philanthropic funding levels for marine area-based conservation amount to roughly 13 percent of domestic expenditures on MPAs, which highlights the necessity for sectors to collaborate and complement each other's strategic roles.

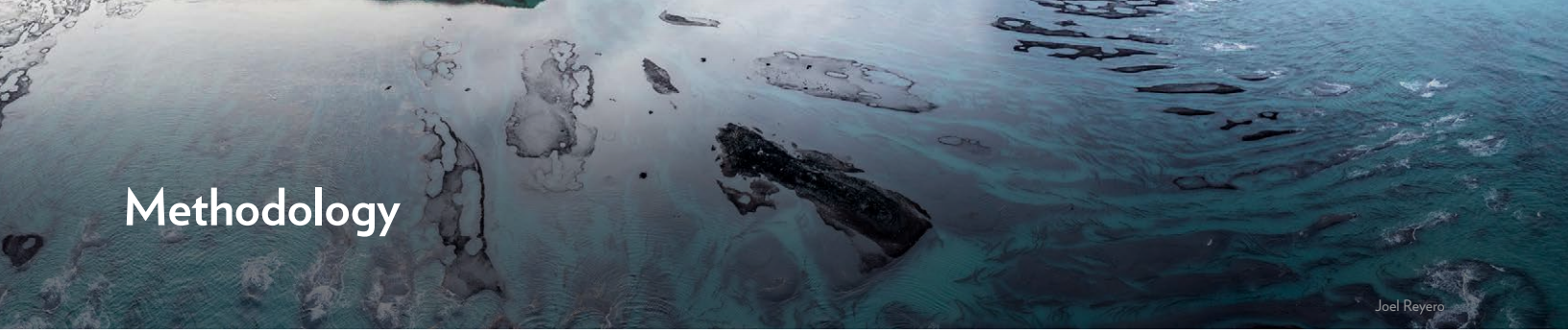
This report is divided into two main sections: a) key findings which include the results of this original research on the philanthropic funding landscape, and b) case studies, authored by external partners, which illustrate both lessons learned and emerging insights from marine area-based conservation projects around the world. Readers are welcome to use all figures from this report provided that the source citation is included.

Photo credits, clockwise from top left: Oceans North; Katy Walker/FFI; pierivb iStock; FFI, Fundação Príncipe, Oikos, MARAPA; Joel Reyero; Rare.

1 The Convention on Biological Diversity (CBD) defines *protected areas* as "geographically defined areas recognized, dedicated, and managed to achieve the long-term conservation of nature."

2 The CBD defines *other effective area-based conservation measures* as: "A geographically defined area other than a protected area, which is governed and managed in ways that achieve positive and sustained long-term outcomes for the in situ conservation of biodiversity with associated ecosystem functions and services and where applicable, cultural, spiritual, socio-economic, and other locally relevant values."

3 United Nations Environment Program, 2022. "State of Finance for Nature. Time to act: Doubling investment by 2025 and eliminating nature-negative finance flows." Nairobi. https://wedocs.unep.org/20.500.11822/41333.



Methodology

The scope of this report focuses on trends in the philanthropic funding landscape for marine area-based conservation during the time period 2010–2022. The report considers marine area-based conservation to encompass a wide range of types of protected areas, including Marine Protected Areas, marine reserves, locally-managed marine areas, marine sanctuaries, marine monuments, marine parks, and other effective area-based conservation measures (OCEMs).

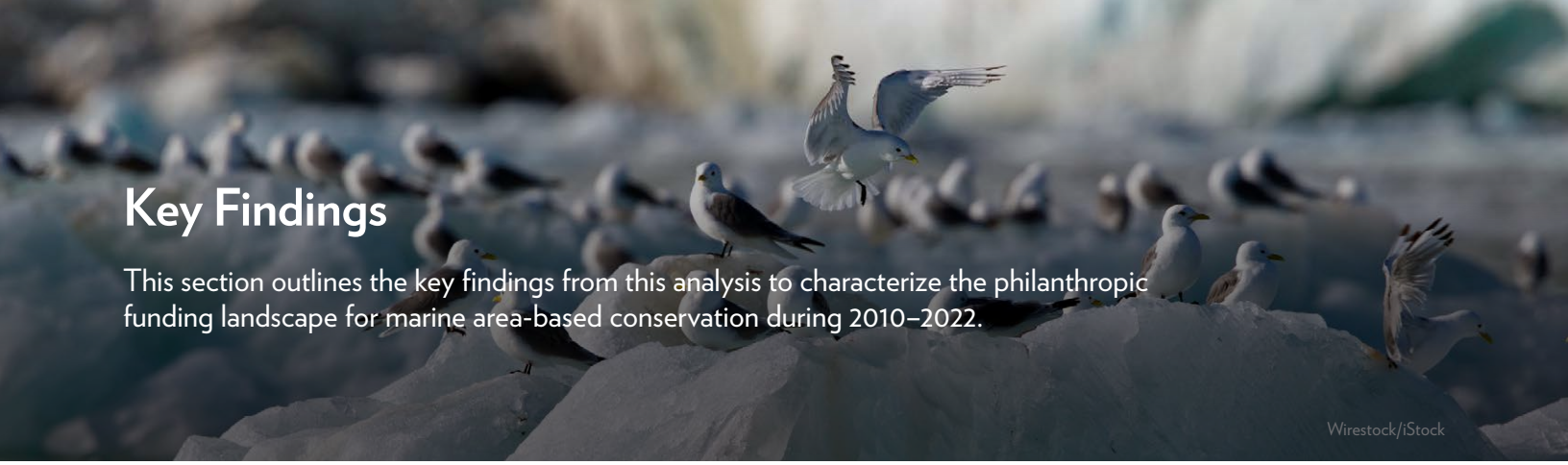
The study team recognizes that individual protected areas vary broadly across characteristics such as the level of protection, implementation status, allowable uses, conservation focus, and scale of protection. To support shared language and a common accounting framework for area-based protections, the study team refers to *The MPA Guide*, which is featured in this report as a case study on page 16.

To prepare this analysis, Our Shared Seas (OSS) gathered grants data directly from the 80 largest marine philanthropic funders, in addition to external sources such as Candid, the European Foundation Center, IRS Form 990 tax documents, and foundation websites. This project aims to include the most comprehensive geographic coverage of marine funders, and dedicated efforts were made to add funders based outside of North America and Europe. Despite these efforts, the report may have some gaps in geographic coverage for funders, particularly those based in Asia or South America. The study team has high confidence that this analysis nonetheless represents the most significant funders in marine area-based conservation and it welcomes feedback for potential future analyses to refine its coverage.

This study used a discrete lens in bounding funding for marine area-based protection. Funding for broader habitat and wildlife protection projects—such as conserving blue carbon ecosystems or protecting threatened species—were excluded in cases that lacked a direct association to area-based conservation on the water. Our Shared Seas cleaned and coded data based on the three categories shown in the table below. Grants in Group 1 were included by default and presumed to have a direct relation to area-based protection. Grants in Group 2 were manually reviewed and included if there was a connection to area-based protection, while grants in Group 3 were excluded from the analysis. For a more detailed description of the full methodology, see Appendix A.

Table 1: Inclusion versus exclusion categories

Group 1: Direct relation: Include	Group 2: Manual review to include or exclude	Group 3: Exclude
30×30	Capacity building	Blue carbon
Core support for MPA-oriented organizations	Communications	Coral
Grants with relevant place names, e.g., Bird's Head, Blue Abadi, Easter Island, Coral Triangle, Eastern Tropical Pacific	Community-based conservation	Corals
	Ecosystem-based management	Deep sea or deep-sea mining
	Indigenous and/or community-led conservation	Fisheries management
High Seas	Livelihoods	Mangroves, seagrass, kelp, etc.
LMMA	Nearshore protection / restoration	Marine rights
Marine monument, park, or reserve	Training	Marine tenure
Marine Protected Area(s)		Sharks, sea turtles, rays, etc.
Marine spatial planning		Small-scale fisheries (SSFs)
Marine zoning		Species protection or wildlife protection
MPAs		
Nearshore exclusion zone		
OECMs		



Wirestock/iStock

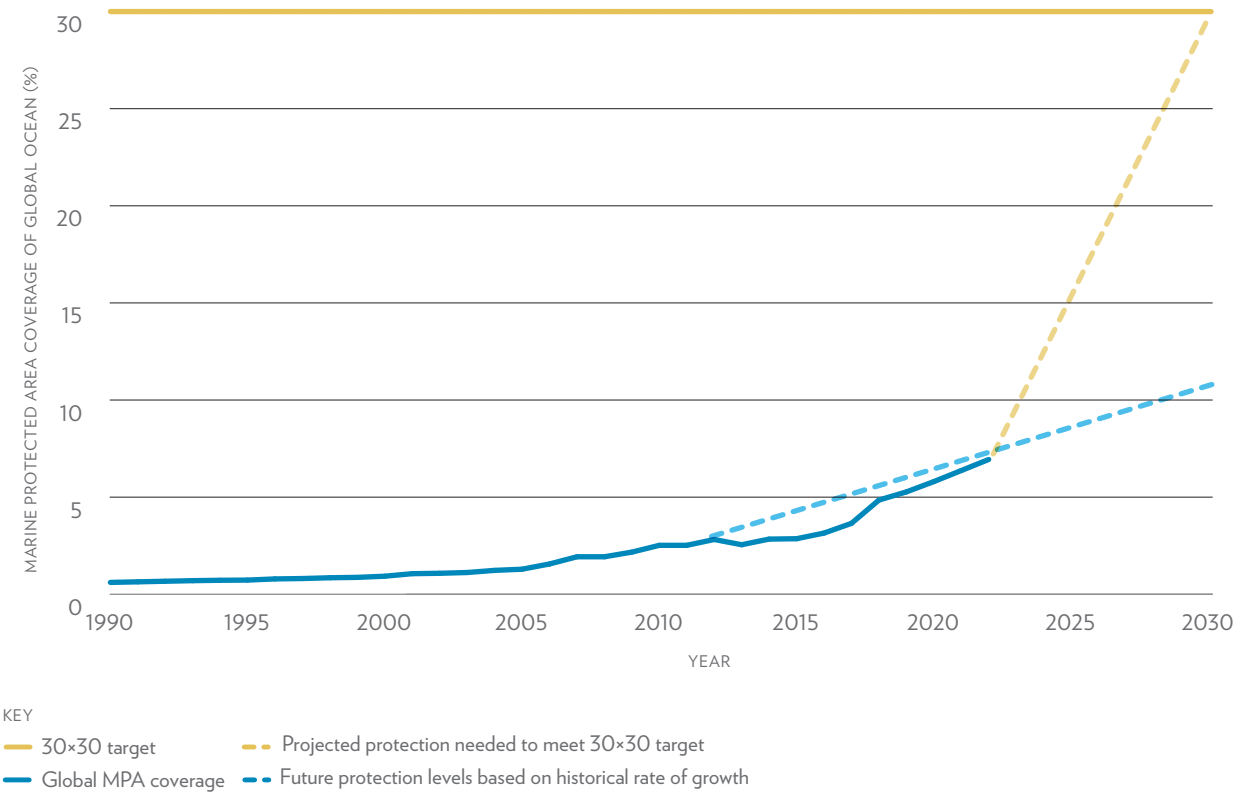
Key Findings

This section outlines the key findings from this analysis to characterize the philanthropic funding landscape for marine area-based conservation during 2010–2022.

Achieving the global target of protecting 30 percent of the ocean by 2030 will require a more than tripling in the protection of marine areas in seven years.

As of late 2023, an estimated 8.2 percent of the ocean is protected, according to the World Database on Protected Areas.[4] Reaching the global area-based protection target, shown as the dotted line in yellow below, will require a vast scale-up in protection efforts. Practitioners caution that such efforts should not compromise effectiveness or equity in the implementation of the Global Biodiversity Framework.

Figure 1. Marine Protected Area coverage of the global ocean, by year



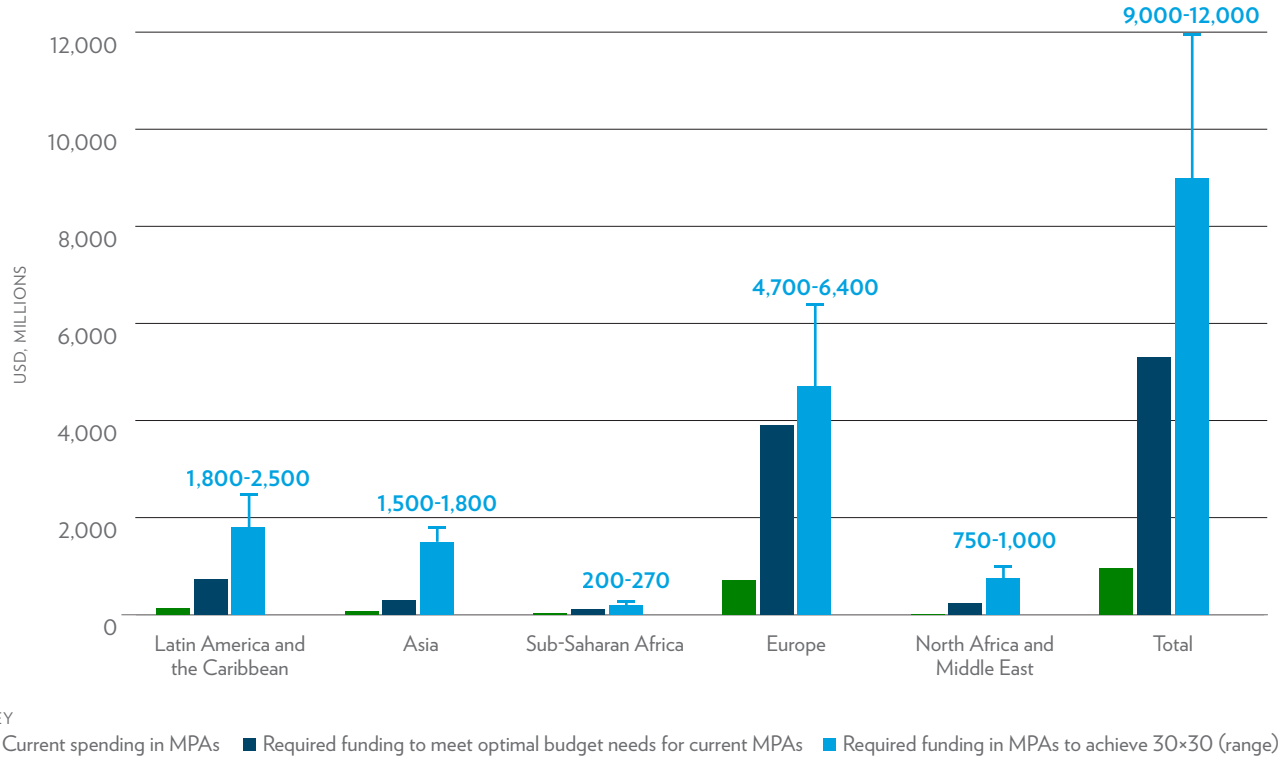
Source: Data provided from MPAtlas, 2023.

4 The Marine Protection Atlas, 2023. "MPA Statistics." https://mpatlas.org/. Accessed November 6, 2023.

Funding needed to protect 30 percent of the ocean is estimated at USD 9–12 billion per year.[5]

According to an analysis from the United Nations Environment Program, an estimated USD 9–12 billion per year is required to protect 30 percent of the ocean. Although the finance gap varies by region, the overall gap is 9 to 12 times greater than current spending in MPAs globally. Resource mobilization is considered an essential component for supporting the rapid acceleration of efforts to protect 30 percent of the ocean by 2030; this global campaign will require dedicated contributions from the public, private, and philanthropic sectors.

Figure 2. Marine Protected Areas: Current funding versus funding needed for 30×30, by region, 2022 (USD)



Notes: 1) The required funding for MPAs is estimated as the optimal budget needed to manage existing MPAs. 2) Current spending in protected areas in Oceania is not reported due to limited data reported in the region. 3) Current spending in MPAs in North America is not included due to the complex division of enforcement responsibilities across multiple agencies.

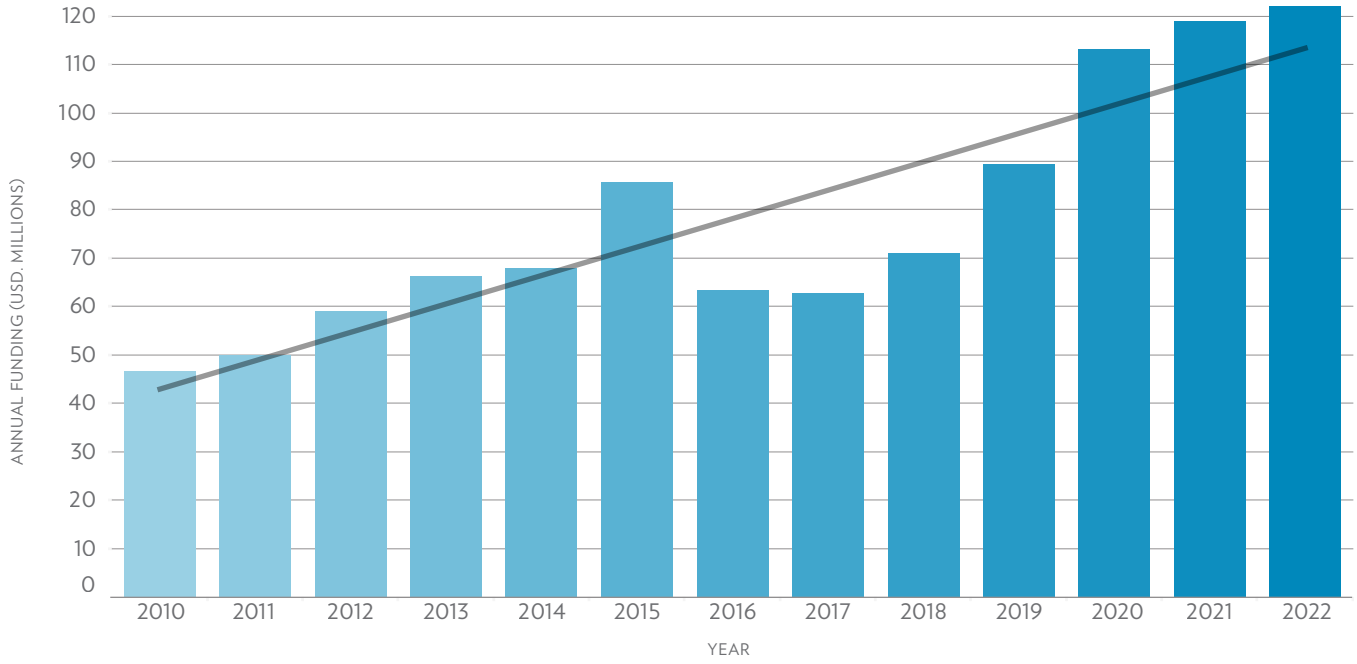
Source: United Nations Environment Program, 2022. "State of Finance for Nature. Time to act: Doubling investment by 2025 and eliminating nature-negative finance flows." Nairobi. https://wedocs.unep.org/20.500.11822/41333.

5 United Nations Environment Program, 2022. "State of Finance for Nature. Time to act: Doubling investment by 2025 and eliminating nature-negative finance flows." Nairobi. https://wedocs.unep.org/20.500.11822/41333.

Annual philanthropic funding for marine area-based conservation has more than doubled, from less than 50 million in 2010 to USD 122 million in 2022.

Several ocean funders have shown longstanding interest in protected areas as a conservation tool, and the issue has attracted additional interest in recent years given momentum of the 30×30 global goal and efforts to support the rights and needs of Indigenous Partners and local communities. The Protecting Our Planet Challenge—which includes a pledge of USD 5 billion over 10 years for the protection of both land and ocean areas—represents the largest private funding commitment to biodiversity conservation.[6]

Figure 3. Marine area-based conservation funding from philanthropic sources, 2010–2022 (USD)



Source: Our Shared Seas, 2023. "Funding Trends 2023: Tracking Grantmaking in Marine Area-based Conservation."

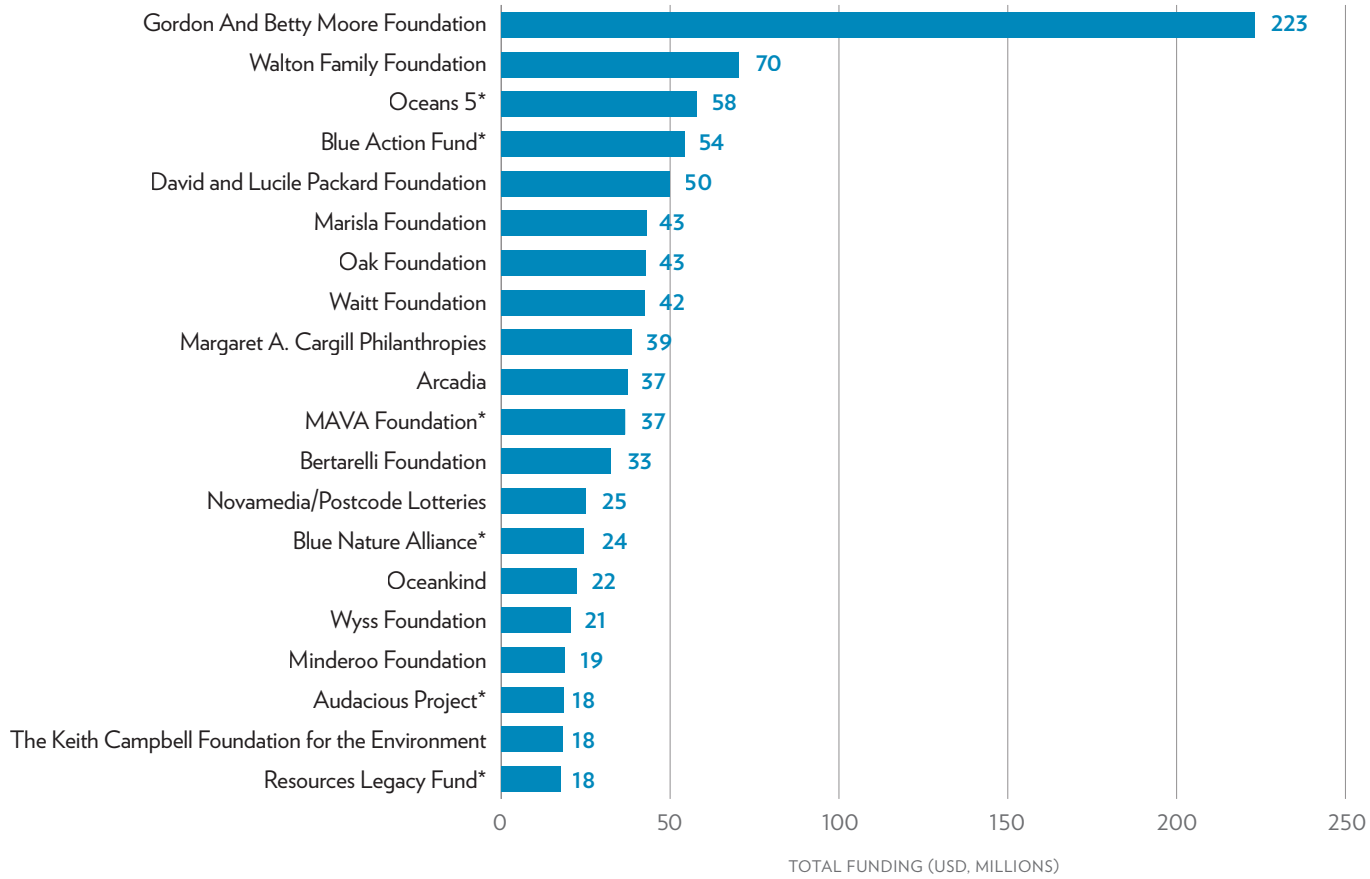
6 Bloomberg Philanthropies. "Private Funders of the New 'Protecting Our Planet Challenge' Announce $5 Billion Commitment to Protect and Conserve 30% of Planet by 2030." https://www.bloomberg.org/press/private-funders-of-the-new-protecting-our-planet-challenge-announce-5-billion-commitment-to-protect-and-conserve-30-of-planet-by-2030/.

The increase in philanthropic funding for marine area-based conservation is driven by commitments from long-standing funders, as well as new and expanded commitments in the space.

Funders such as the David and Lucile Packard Foundation, Gordon and Betty Moore Foundation, Marisla Foundation, Oak Foundation, Oceans 5, and Waitt Foundation have actively supported protected area projects around the world for more than a decade. New and expanded commitments in the sector— including from Bloomberg Philanthropies, Oceankind, and the Bezos Earth Fund, among others—are also driving an increase in ocean funding for protected areas.

Note that Bloomberg Philanthropies is not shown in the chart below given the time period of 2010–2022, during which much of the organization's ocean funding focused on issue areas such as fisheries transparency, coral reef conservation, and coastal livelihoods. Bloomberg Philanthropies is a founding member of the Protecting Our Planet Challenge and its protected area funding is expected to place the organization as a top funder for area-based conservation in a future edition of this chart.

Figure 4. Top philanthropic funders for marine area-based conservation, 2010–2022 (USD)



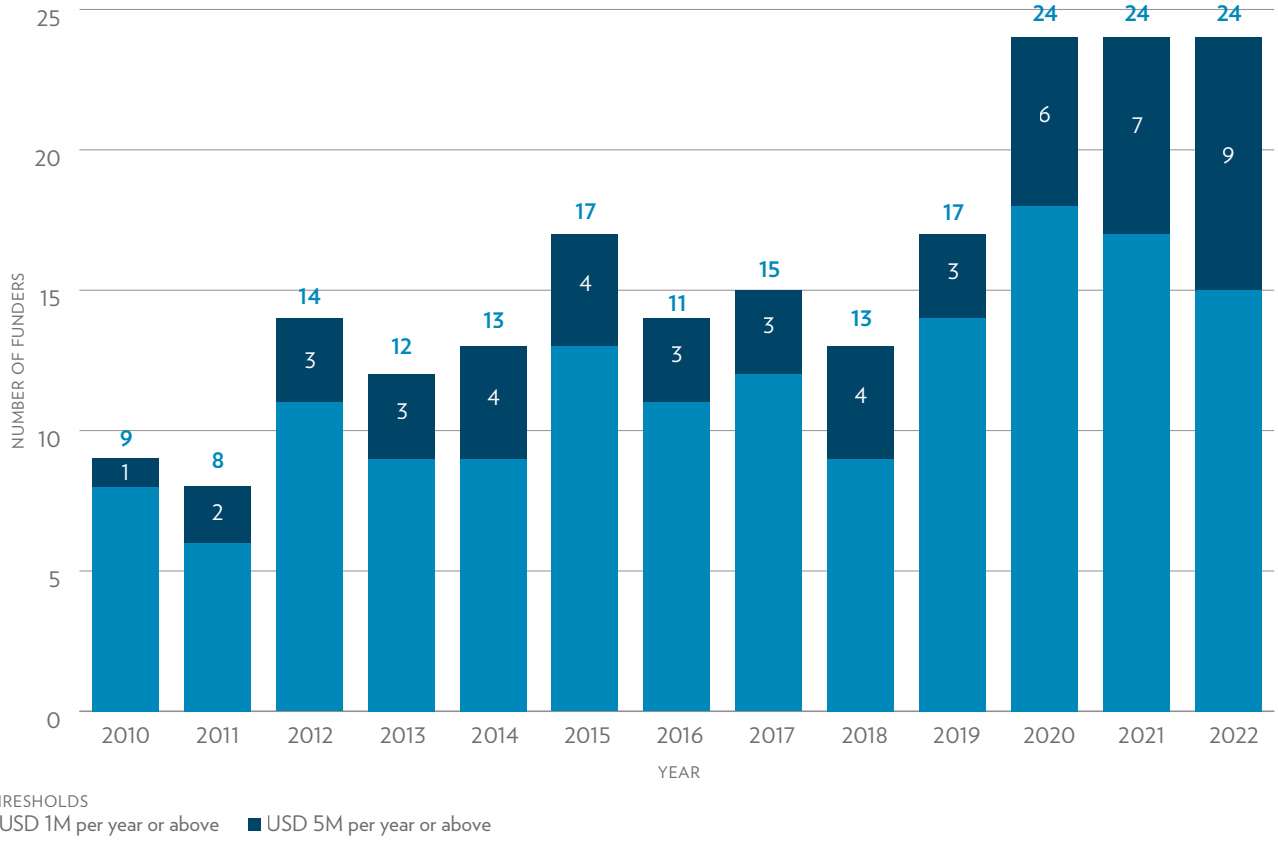
*Oceans 5, Resources Legacy Fund, and Blue Nature Alliance are re-grantors. Funding may be duplicative of other sources listed.
Blue Action Fund is an international government-funded entity that has been included in our analysis since it primarily grants to NGOs.
MAVA Foundation ceased grantmaking activities in 2022.
Audacious Project is a collaborative funding initiative housed at TED. In 2019, The Nature Conservancy partnered with the Audacious Project to use blue bonds to restructure island nations' debt and provide funds for ocean conservation.

Source: Our Shared Seas, 2023. "Funding Trends 2023: Tracking Grantmaking in Marine Area-based Conservation."

The field of ocean funders supporting marine area-based conservation at scale is growing.

In 2010, only nine funders supported marine area-based conservation at an annual threshold of USD 1 million or above; by 2022, this figure increased to 24 funders. Similarly, only one funder provided USD 5 million or above annually for this issue in 2010. By 2022, nine funders supported marine area-based conservation at this threshold.

Figure 5. Funders providing USD 1M per year or above, and USD 5M per year or above in MABC funding

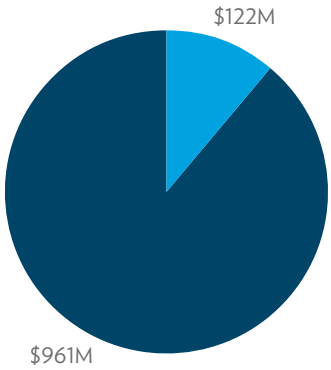


Source: Our Shared Seas, 2023. "Funding Trends 2023: Tracking Grantmaking in Marine Area-based Conservation."

While philanthropic funding for marine area-based conservation is gaining momentum, its funding level represents roughly 13 percent of annual domestic expenditures on Marine Protected Areas.

Annual public funding for MPAs is approximately USD 1 billion, compared to USD 122 million from philanthropy.[7] Practitioners suggest that there are specific roles and responsibilities that governments should hold in protected area implementation, while philanthropy is well suited to provide complementary support in more strategic ways. Reaching the global target of 30×30 will require informed collaboration across public, private, and philanthropic sectors to leverage the scale and capabilities of each sector.

Figure 6. Philanthropic versus public funding sources for MPAs, 2022 (USD)



Note: Other funding sources, including from the private sector, represent important contributions for protected area conservation as well. A global estimate of this funding is not current available specifically for MPAs to draw analogous comparisons of funding between the various sectors.

Sources: United Nations Environment Program, 2022. "State of Finance for Nature. Time to act: Doubling investment by 2025 and eliminating nature-negative finance flows." Nairobi. https://wedocs.unep.org/20.500.11822/41333; Our Shared Seas, 2023. "Funding Trends 2023: Tracking Grantmaking in Marine Area-based Conservation."

CASE STUDY

Innovative Financing to Protect the Galapagos

By The Pew Charitable Trusts

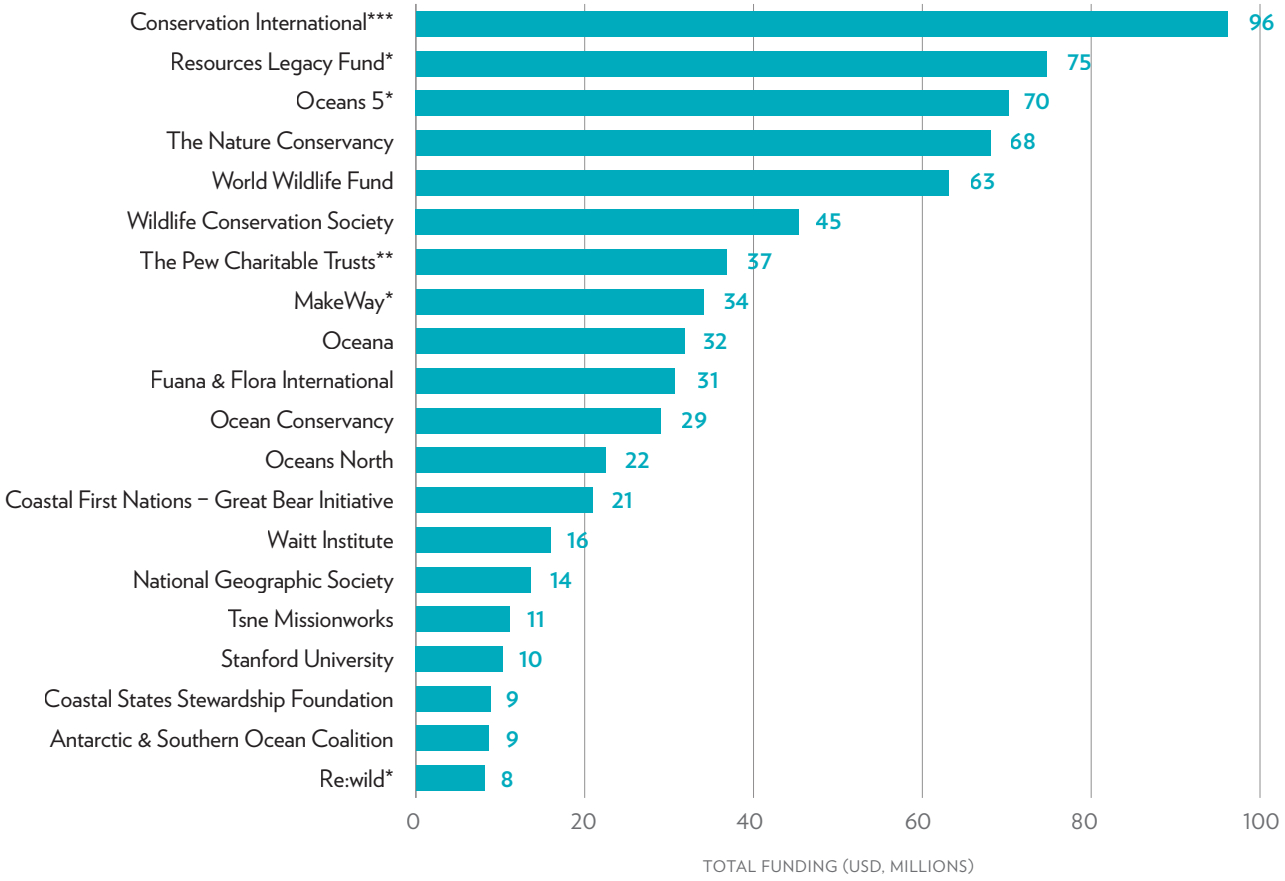
Ecuador's recent debt-for-nature deal in the Galapagos—the largest in history—will allow Ecuador to reduce its debt burden in exchange for its protection of the Galapagos Islands, one of the most biodiverse marine regions in the world. This landmark project provides an opportunity to learn about innovative financing approaches for protecting biodiversity, while also reducing government debt.
Read the Case Study on page 19.

7 United Nations Environment Program, 2022. "State of Finance for Nature. Time to act: Doubling investment by 2025 and eliminating nature-negative finance flows." Nairobi. https://wedocs.unep.org/20.500.11822/41333; Our Shared Seas, 2023. "Funding Trends 2023: Tracking Grantmaking in Marine Area-based Conservation."

The top five recipients of philanthropic funding for marine-area based conservation during 2010–2022 included Conservation International, Resorces Legacy Fund, Oceans 5, The Nature Conservancy, and World Wildlife Fund.

Several organizations led by Indigenous Peoples and local communities—including MakeWay, Oceans North, Coastal First Nations—are supported by the Gordon and Betty Moore Foundation and also appear as top grantees in the chart below.

Figure 7. Top grantees for marine area-based conservation, 2010–2022 (USD)



*Regrantor

**The Pew Charitable Trusts operates as both a regrantor and an implementing NGO with its own endowment.

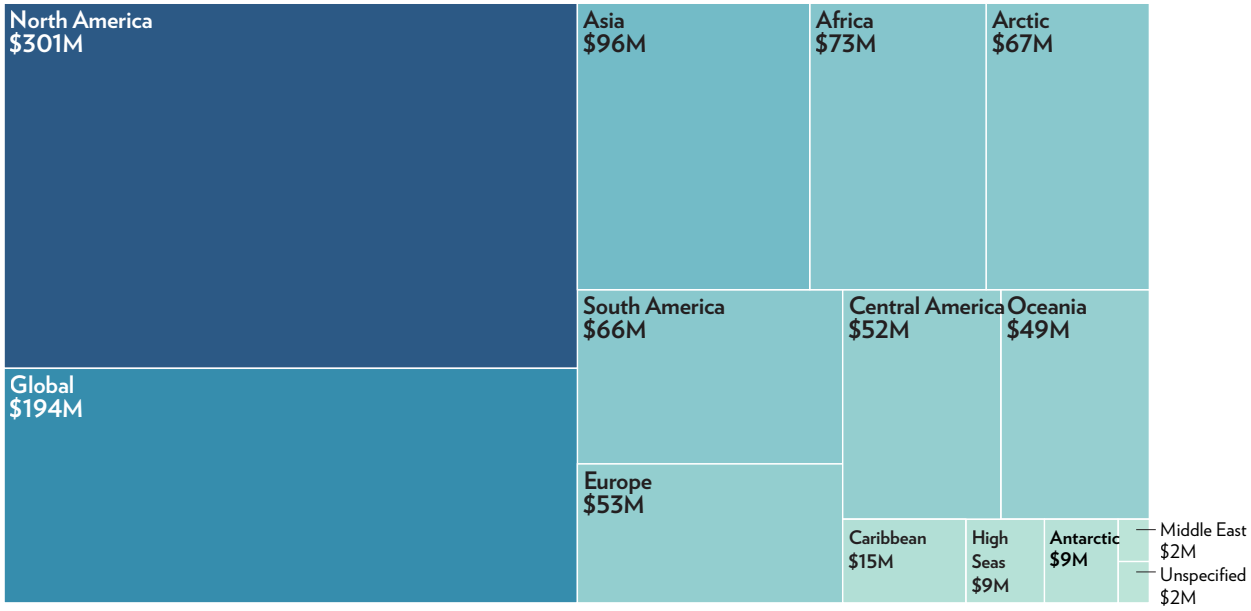
***Funding to Conservation International (CI) is inclusive of funding to the Blue Nature Alliance, which is implemented by both CI and Pew Charitable Trusts.

Source: Our Shared Seas, 2023. "Funding Trends 2023: Tracking Grantmaking in Marine Area-based Conservation."

Taken in aggregate across the past decade, the largest share of philanthropic funding for marine area-based conservation has been allocated to projects in North America as well as global initiatives.

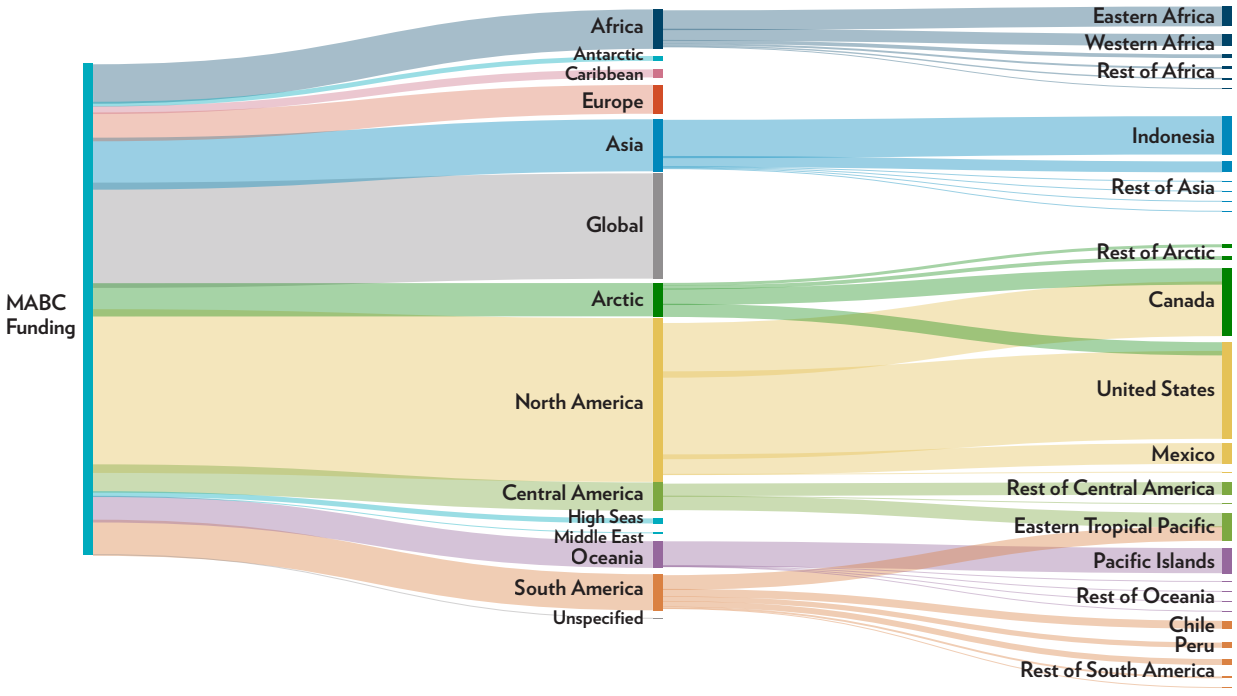
Certain countries, regions, and seascapes have emerged as leading recipients of philanthropic funding for marine area-based conservation over the past decade, often due to their biodiversity value and/or level of threat. Top recipients by geography include Canada, Indonesia, Eastern Africa, the Pacific Islands, and the Eastern Tropical Pacific. See Table 3 in the Appendix for geography taxonomy.

Figure 8. Philanthropic funding for marine area-based conservation, by region, 2010–2022 (USD)



Source: Our Shared Seas, 2023. "Funding Trends 2023: Tracking Grantmaking in Marine Area-based Conservation."

Figure 9. Philanthropic funding for marine area-based conservation, by country and region, 2010–2022 (USD)



Source: Our Shared Seas, 2023. "Funding Trends 2023: Tracking Grantmaking in Marine Area-based Conservation."

Many funders in the ocean community have increasingly sought to support conservation efforts in the Global South to facilitate a more equitable distribution of funding resources.

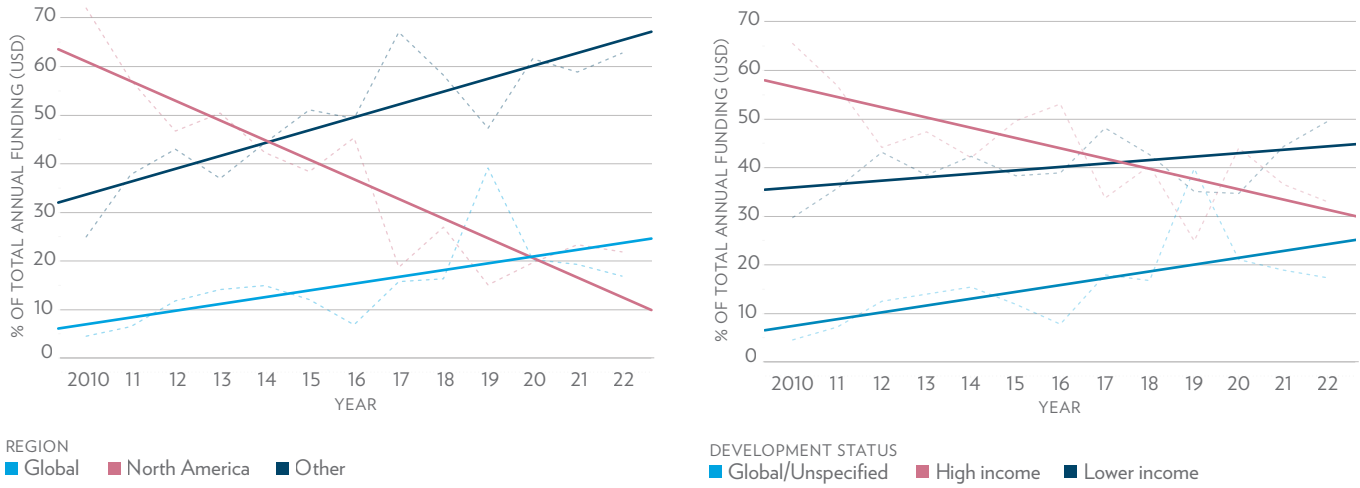
In addition to recognizing historical injustices against Indigenous Peoples—including displacement and dispossession from protected areas—many in the conservation community are working to elevate the leadership of Indigenous Peoples and local communities (IPLCs) as central to the solution in addressing the intertwined biodiversity-climate crisis.

Estimating the specific proportion of funding supporting organizations in the Global South or led by IPLC partners is difficult due to the granularity of grant data. This analysis used a proxy of country development status and geography grouping to characterize funding trends at a coarse level. The charts below represent an initial effort in tracking the distribution of funding flows and should be interpreted loosely; a more fine-grained analysis in the future would provide a valuable contribution to the field.

Initial analysis suggests that marine area-based conservation funding is increasing to geographies outside of North America and global initiatives. Funding for marine-area based conservation projects in North America declined from representing roughly 70 percent of philanthropic funding in 2010 to 20 percent in 2022. Meanwhile, funding to other geographies (outside of global initiatives) increased from roughly 25 percent of philanthropic funding in 2010 to 65 percent in 2022.

The share of philanthropic funding to lower income countries also appears to be increasing for marine area-based conservation. In 2010, funding to lower income countries represented roughly 30 percent of philanthropic funding on the topic; by 2022, this figure increased to 50 percent. In contrast, funding to high income countries declined from 65 percent to less than 35 percent during the same time period.

Figure 10. Philanthropic funding for marine-based conservation, by regional grouping (left), and by development status (right)



Trends are indicated with solid lines. Source: Our Shared Seas, 2023. "Funding Trends 2023: Tracking Grantmaking in Marine Area-based Conservation."

CASE STUDY

A Model of Indigenous-led Conservation in Greenland

By Oceans North

Indigenous-led conservation is essential if we are going to achieve our shared goal of a healthy ocean for generations to come. The stakes have never been higher. If we get this right, we can collectively realize large-scale protections in some of the most critical ecosystems in the world, while helping to enable truly transformative social, economic, and cultural outcomes for our partners and their communities.

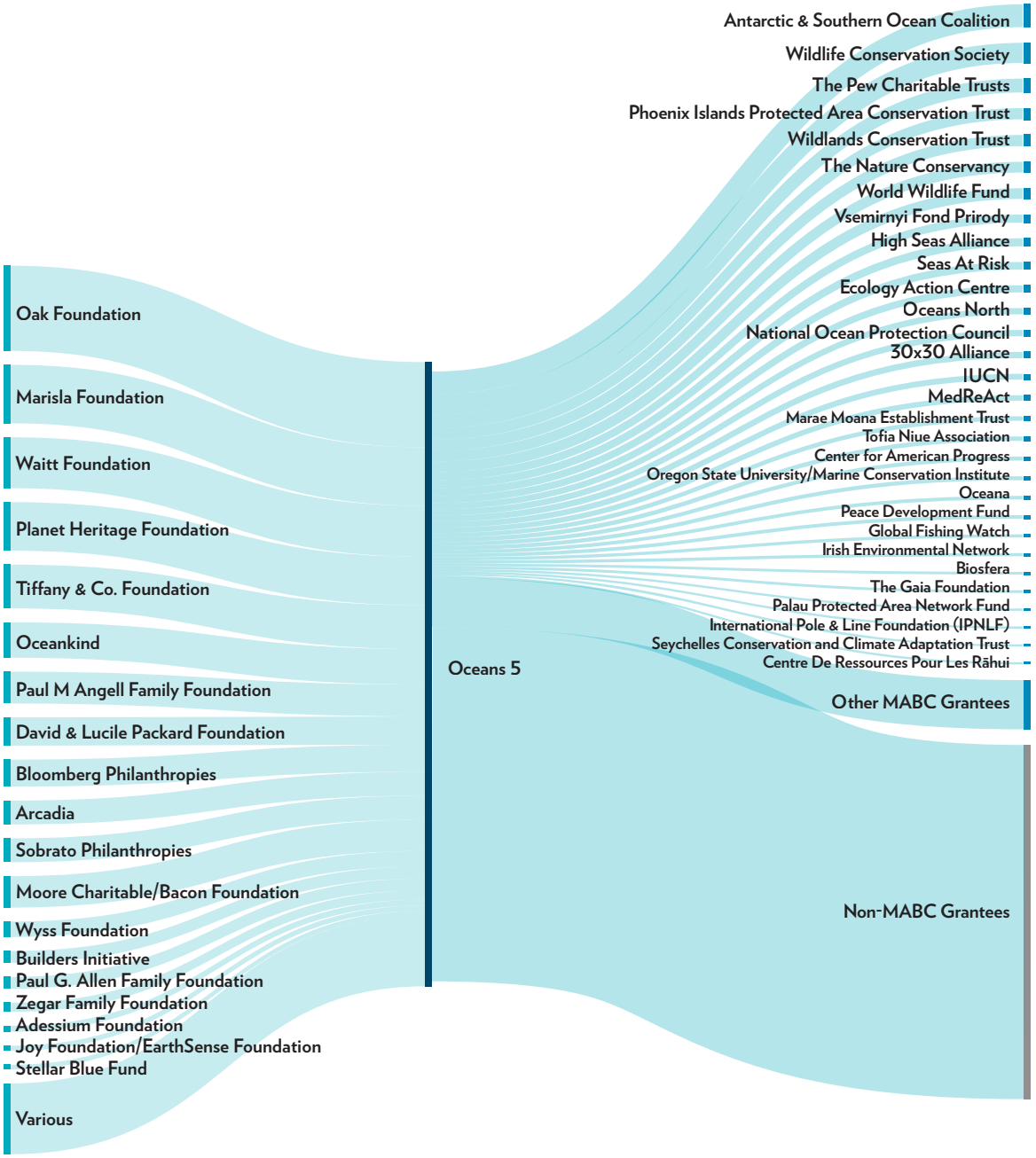
Read the Case Study on page 18.

Regranting organizations appear to be playing an increasingly influential role in facilitating the deployment of funding for marine area-based conservation.

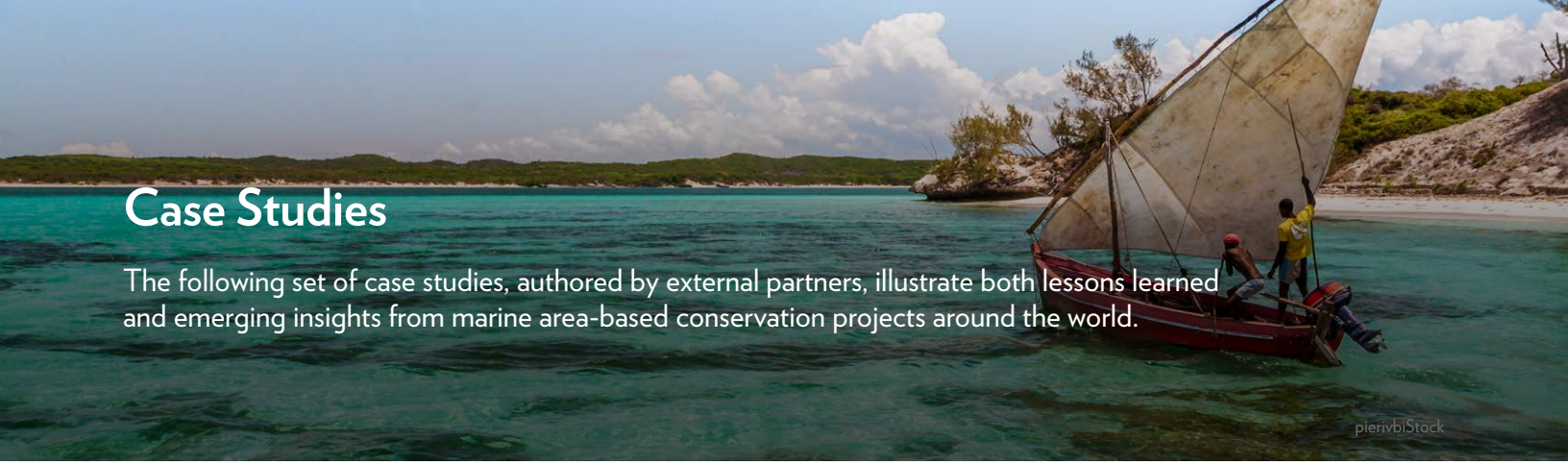
Philanthropic institutions have increasingly supported regranting organizations in recent years, typically for a variety of reasons. Some foundations have limited staff capacity and rely on regranting organizations to identify promising grantmaking opportunities. Others pool their funds for rapid response, leverage, or collaboration. Successful regranting organizations generally minimize transaction costs and maximize grantmaking capacity.

The figure below provides an illustration of regranting via Oceans 5, which pools funding from leading ocean funders and supports dozens of grantees around the world on projects related to marine area-based conservation.

Figure 11. Funding flows for marine area-based conservation via the regrantor Oceans 5, 2010–2022 (USD)



Source: Our Shared Seas, 2023. "Funding Trends 2023: Tracking Grantmaking in Marine Area-based Conservation.



Case Studies

The following set of case studies, authored by external partners, illustrate both lessons learned and emerging insights from marine area-based conservation projects around the world.

pierivbiStock

Protecting Half the Planet: The Road to the High Seas Treaty
by The High Seas Alliance

Ross Sea Region MPA
by The Pew Charitable Trusts

Lewis Burnett/Ocean Image Bank

The MPA Guide Tracks Effectiveness of Ocean Protection
by Oregon State University

A Model of Indigenous-led Conservation in Greenland
by Oceans North

Advancing Area-based Marine Conservation in South Africa
by WILDTRUST

Sustainable Financing Mechanisms in Niue
by The Pacific Community (SPC)

Innovative Financing to Protect the Galapagos
by The Pew Charitable Trusts

The MPA Guide as a Field-building Tool

By Oregon State University

In an era of increasing threats to ocean ecosystems and ocean-dependent communities, MPAs are a key tool for achieving ocean health and benefits to people. Yet despite international agreements to establish more MPAs and decades of research showing their benefits, confusion has persisted on the definition of "protection", the conditions under which an MPA is effective, and outcomes that can be expected from different types of MPAs. Not all MPAs are the same; they range from full protection in "no-take" areas to minimal protection with extractive activities. Some exist only on paper, not in practice. We need to understand the different types and their outcomes as it is crucial to know how much of the ocean is effectively protected in MPAs.

The MPA Project, housed at Oregon State University, continues to lead a global dialogue on MPAs by facilitating an inclusive, collaborative, and consultative process based on a science-based tool called *The MPA Guide*. This guide can be used to track both the quality and quantity of ocean protection for biodiversity conservation and human well-being. The *MPA Guide* specifies when protection begins, which activities are allowed, what conditions are required for success, and what outcomes can be expected. It emphasizes effectiveness of protection by considering MPA quality, rather than quantity alone. It complements the well-known IUCN Protected Areas Categories and provides a blueprint to assess and monitor true progress on conservation targets. *The MPA Guide* helps to categorize, track, evaluate, and plan MPAs to inform decisions about scientific, societal, and policy priorities.

The MPA Guide is growing in use within countries and at the global level. It forms the basis for a growing global database of MPAs by Stage of Establishment (i.e., proposed, designated, implemented, actively managed) and Level of Protection (i.e., fully, highly, lightly, minimally). Beyond tallying a single global number, *The MPA Guide* reveals how much of the ocean is effectively protected in areas with different Stages and Levels, to better understand what conservation outcomes can be expected.

As a result of growing use of ***The MPA Guide***:

- **The global community is coalescing around shared language for defining MPAs, protections they provide, and outcomes that can be expected.** The science-based and clear language from the *Guide* clarifies that effective conservation is greatest in Highly to Fully Protected MPAs that are Implemented and Actively Managed to deliver conservation benefits. This is backed by decades of research inside and outside MPAs globally.
- **Significant partnerships have arisen, including collaboration between the two key organizations that track MPAs: the UNEP-World Database on Protected Areas (WDPA) and the Marine Protection Atlas.** These two key organizations help track progress towards the Global Biodiversity Framework's Target 3: to ensure that by 2030 at least 30 percent of the ocean is effectively conserved and managed.
- **Pilot countries are assessing their MPAs using *The MPA Guide* to obtain a clearer sense of the types of protection provided.** They are using the *Guide* to link these to the outcomes they can expect, and adjustments that may be needed to align protection levels with their goals.
- ***The MPA Guide* has built a global network of more than 200 active collaborators spanning at least 47 countries.** These experts continue to apply, refine, socialize, and champion this evidence-based approach to identifying quality protection. These experts bring knowledge in natural and social sciences, policy, management, and communications.

While *The MPA Guide* is not a prescription for which MPAs should be established where, it is an evidence-based resource to support improved accounting, management, and implementation of area-based protections. This is increasingly important for meeting global targets.

Founding Partners of *The MPA Guide* include the United Nations Environment Program, World Conservation Monitoring Centre (UNEP-WCMC), International Union for the Conservation of Nature's World Commission on Protected Areas (IUCN WCPA) – Marine, The MPA Project at Oregon State University, Marine Conservation Institute's MPAtlas, and National Geographic's Pristine Seas.

CASE STUDY

Protecting Half the Planet: The Road to the High Seas Treaty

By The High Seas Alliance

In March 2023, the world's governments agreed to a historic United Nations Treaty for the High Seas. The treaty process entailed almost two decades of discussion, including five years of negotiations. Since its establishment in 2011, the High Seas Alliance (HSA)—a partnership of 50-plus NGOs—has been a driving force behind the Treaty, ensuring it reached this critical milestone. While the agreement itself does not establish new area-based protections, it provides a first-ever legal pathway for establishing MPAs in the high seas, which cover roughly two-thirds of the ocean and almost half of the planet's surface.

If ratified, the new Treaty will address the many governance gaps that have plagued the ocean for decades, including ensuring consistent environmental impact assessments for human activities, advancing fair and equitable sharing of benefits from marine genetic resources, building capacity of countries to implement the agreement, and providing a pathway to establish MPAs—without which, we cannot deliver the Global Biodiversity target to protect 30 percent of the ocean by 2030.

There are three key lessons learned from the High Seas Treaty process:

- **Working as a cohesive coalition can maximize impact.** The High Seas Alliance, through the support of its funders and member organizations, has worked tirelessly for years to ensure a robust treaty would be secured through high-level political advocacy, strategic engagement, expert technical and legal advice and public campaigning to highlight the urgency for action. The HSA clearly demonstrates the power of working as a strong and coordinated alliance—sharing expertise, resources, assets, information, political intel, supporting and lifting up member organizations, and ensuring unified communications and messaging. Without the coalition's continued involvement driving political and public action, we would likely have a much less ambitious agreement.
- **Campaigns can entail a long game but can pay dividends, if successful.** The experience of the High Seas Treaty shows that international policy work takes time, patience, dedication, and commitment for the long run. There are no short-term, high impact, low-hanging fruits when it comes to changing global ocean governance. There are complex legal and policy details that require sustained focus, and there are geopolitical landscapes to navigate. This requires targeted engagement at many levels from the United Nations to capitals around the world.
- **While the High Seas Treaty is a watershed moment for global ocean governance, it is only a first step.** Going forward, focus will shift to three key strands of work. First, the treaty needs to be ratified as soon as possible so it can enter into force and become international law. This requires at least 60 ratifications by countries, and the High Seas Alliance is committed to fast-tracking this process, aiming for entry into force by 2025. Second, the campaign will support building the key institutions that ensure the Treaty functions effectively from a technical, compliance and implementation perspective. Third, the HSA will support laying the groundwork to implement the Treaty, with a key focus on establishing high seas MPAs and ensuring new and existing activities outside these areas are properly assessed and managed to prevent harm to high seas life.

Cinzia Osele Bismarck/Ocean Image Bank

CASE STUDY

A Model of Indigenous-led Conservation in Greenland

By Oceans North

Oceans North Conservation Society ("Oceans North") is a Canadian charity that supports marine conservation and climate action in partnership with Indigenous and coastal communities in the Arctic, Atlantic Canada, Greenland and the High Seas. Grounded in deep partnerships with communities, Oceans North's work actively addresses the unprecedented changes taking place in northern marine ecosystems and ensures they are protected within the framework of Indigenous knowledge, rights, and consultation. We work to empower treaties and strengthen Indigenous institutions and communities.

Oceans North began its work by recognizing that much of the most important Arctic marine habitat in Canada is located directly adjacent to Canada's 51 Inuit communities, and we continue to see an alignment of interests between conservation and peoples who depend on a healthy ocean environment. But we do not assume we are always needed everywhere, and we are committed to investing in our partners in ways that are meaningful and transformative for them and their communities.

Over the last decade, many philanthropies have increasingly adopted Indigenous-led conservation as a grantmaking pillar. This is a welcome development, but potential benefits of investing in Indigenous-led conservation can only be fully realized if funding partners are willing to make real, substantive changes to how they engage with Indigenous grantees. This means confronting persistent colonial approaches embedded in grantmaking systems and committing to devolving power in inclusive and equitable ways. Onerous processes that do not consider important cultural aspects of communities, have the potential to undermine trust and cause problems. In the eyes of many Indigenous grantees, the philanthropic community, as a whole, still has work to do.

Indigenous-led conservation is essential if we are going to achieve our shared goal of a healthy ocean for generations to come. The stakes have never been higher. If we get this right, we can collectively realize large-scale protections in some of the most critical ecosystems in the world, while helping to enable truly transformative social, economic, and cultural outcomes for our partners and their communities.

What does "getting it right" look like in practice? A good example is the bilateral effort by Inuit in Canada and Greenland to jointly protect the North Water Polynya. Called *Sarvarjuaq* in Inuktitut and *Pikialasorsuaq* in Greenlandic, this ocean ecosystem is one of the planet's most productive. Inuit communities on both sides of Baffin Bay rely on the North Water Polynya's natural wealth, hunting and harvesting wildlife and fish. This shared reliance has created important cultural linkages between Nunavut and Greenland and a shared desire to protect the area.

For the last decade, leaders on both sides of Baffin Bay have been working to advance the protection of the North Water Polynya and establish bilateral co-management. After a robust community consultation effort in 2016 and 2017—led by the Pikialasorsuaq Commission and supported by research and NGO partners—a clear vision emerged for the creation of a cooperative and Indigenous-led caretaking body for Pikialasorsuaq. This critical work by the Commission and its partners helped to create the conditions for the establishment of Oceans North Kalaallit Nunaat (ONKN)—Greenland's first, home-grown conservation-focused civil society organization. While ONKN's founding mission is to finalize protection for Pikialasorsuaq, ONKN has established itself as an important voice in matters of ocean health, sustainable fisheries, and healthy coastal communities. The legacy of the Commission and the existence of ONKN adds important capacity for future moments where society will need to meet new environmental and social challenges.

Ziba Photo MediaiStock

Innovative Financing to Protect the Galapagos

By The Pew Charitable Trusts

A growing body of science demonstrates that fully protected, well-designed, and well-managed MPAs can provide a powerful tool to conserve biodiversity and ecosystems, improve long-term food security, and protect ocean based livelihoods.[8] However, establishing and effectively implementing and managing the protected areas can require significant resources. Ecuador's recent debt-for-nature deal in the Galapagos—the largest in history—will allow Ecuador to reduce its debt burden in exchange for its protection of the Galapagos Islands, one of the most biodiverse marine regions in the world. This landmark project provides an opportunity to learn about innovative financing approaches for protecting biodiversity, while also reducing government debt.

In January 2022, President Guillermo Lasso signed a decree establishing the Hermandad Marine Reserve conserving 60,000 km^2 between the Galápagos Islands and Costa Rican waters, with 30,000 km^2 of the area fully protected to safeguard a key migratory corridor. In May 2023, the Government of Ecuador, with technical support from the Pew Bertarelli Ocean Legacy (PBOL) Project and other partners, converted $1.6 billion in existing commercial debt into a $656 million loan financed through a bond arranged by Credit Suisse.

The U.S. International Development Finance Corp. provided $656 million in risk insurance for the loan and the Inter-American Development Bank provided an $85 million guarantee. The arrangement will generate more than $450 million in financial resources to support marine protections and conservation over the next two decades and will ensure $12 million annually, the amount a cost analysis identified as required to fully fund effective management of both the Galapagos and Hermandad reserves.

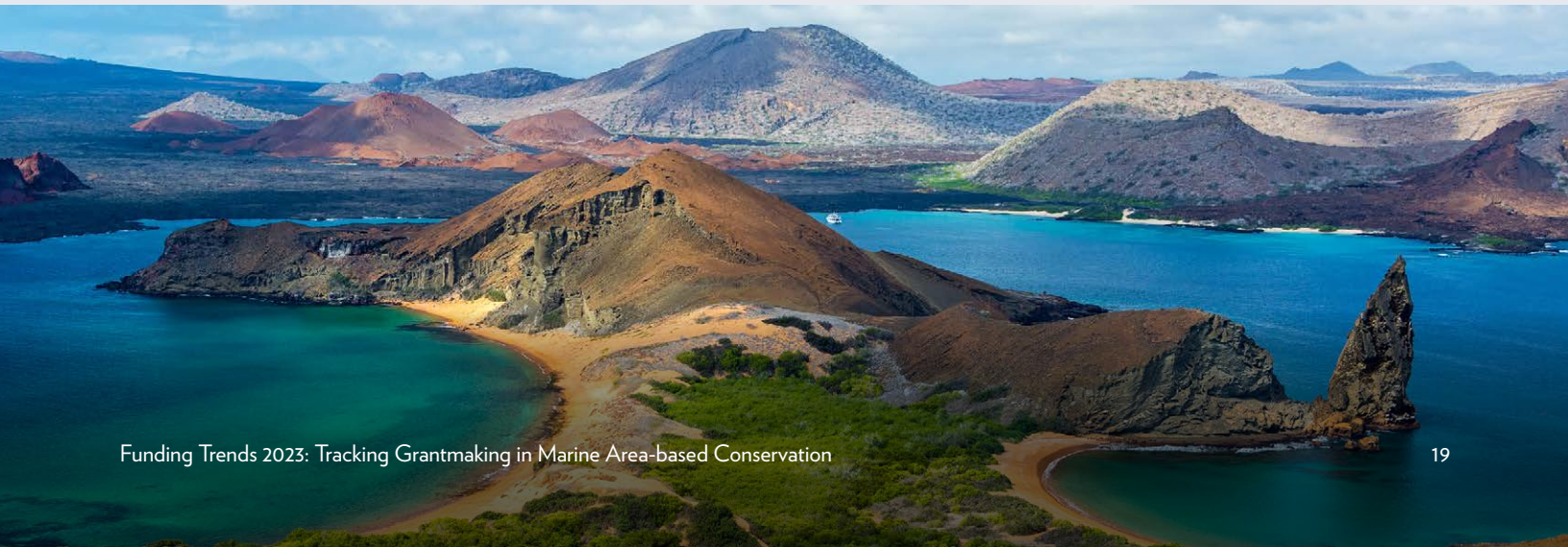
Local conservation funding decisions will be made by the Galápagos Life Fund (GLF), a nonprofit trust established in 2023 as part of the debt conversion deal. PBOL, with the support of partners, helped stand up the GLF, which will be governed by an 11-member board of directors, including five Ecuadorian government ministers and six non-government representatives. The conservation funding priorities for the GLF include: monitoring, enforcement, and management of Hermandad and Galapagos reserves; sustainable fisheries management; science and economics; environmental education; sustainable tourism; and other related conservation priorities of communities in the Galapagos.

In the years leading up to the deal, the project supported numerous formal public and private consultations with the communities, industry, government, and others regarding the expansion, finance mechanism, and conservation funding priorities. The Government of Ecuador developed the sustainable conservation commitments and funding priorities by working closely with the artisanal and industrial fishing sectors, conservation NGOs, and local communities through a consensus-building process.

As countries around the world work collectively to reach global marine protection targets, scarce available funding will remain a challenge. Debt restructuring can provide an option for funding, particularly when a country has existing commercial debt with interest rates above five to six percent and trading at a discount of at least 20 percent; access to key financing tools, such as political risk insurance, loan guarantees, and reinsurance; a commercial bank willing to underwrite a deal; and the will and capacity to complete the transaction and fulfill the conservation commitments. All of these conditions existed in Ecuador. However, debt restructuring is just one of a growing number of promising mechanisms and strategies that incorporate a widening array of sources.

8 Gurney G.G., Adams V.M., Álvarez-Romero J.G., Claudet J. (2023). Area-based conservation: taking stock and looking ahead. *One Earth 6: 98-104.*

DC_Colombia/iStock



Case: Sustainable Financing Mechanisms in Niue

By The Pacific Community (SPC)

Niue—a small island developing state in the South Pacific Ocean—is among the largest raised coral atolls in the world. Geographically inimitable, it boasts some of the clearest waters in the world, is home to globally significant marine and terrestrial biodiversity and ecosystems, and has deeply rooted communities, culture, and traditional practices.

Under increasing pressure from the impacts of climate change, pollution and fishing, and with limited capacity to respond, Niue embarked on enhancing its sustainability journey in 2015 through its first ever Public Private Partnership, the Niue Ocean Wide (NOW) Initiative. Partnering with Oceans 5, National Geographic Pristine Seas, local stakeholders and the Government of Niue, the NOW Initiative seeks to sustainably manage, protect, and conserve its ocean resources to underpin the sustainable resilient livelihoods and culture of its people, now and into the future.

Achievements to date are many, but a few highlights include:

- **100% EEZ under Marine Spatial Management Plan—** Niue Nukutuluea Multipurpose Marine Park (320,000 km^{2}km)
- **40% EEZ no-take Large-Scale MPAs—** Niue Moana Mahu (127,000 km^2 – the largest in the world as a proportion of EEZ)
- **Design of an innovative sustainable financing mechanism**

To help ensure successful implementation over the long-term, the NOW Initiative has prioritized sustainable financing for ocean conservation in Niue, which is reinforced by a sustainable and resilient blue economy. This approach helps prevent local communities from bearing disproportionate burden and opportunity cost in use of this rich ocean space.

With more than three decades of experience in unsustainable project-based interventions, NOW designed a fit-for-purpose Sustainable Financing Mechanism (NOW Trust) and an innovative capitalization instrument called Niue's Ocean Conservation Commitments (OCCs) to raise the necessary funds to support its ocean protection, for the long term and hopefully in perpetuity. A holistic appreciation of the many value dimensions and drivers of Moana Mahu, underpin the intended demand for OCCs. One where OCC sponsors seek invaluable environmental, resilience, security and socio-economic outcomes, rather than financial returns.

Ocean Conservation Commitments are based on the cost of effectively protecting Moana Mahu, and leveraging compatible sustainable development, socio-economic and resilience outcomes for Niue. OCCs are priced per square kilometer per year in sponsorship unit across the entire Moana Mahu Area. Each commitment is sold for USD 420, and there are 127,000 available for sponsorship, which is aimed at leveraging the USD 20 million capitalization target of the NOW Trust. The commitments will provide upfront funding to cover the next 20 years of protection across Moana Mahu.

As an endowment, this will provide predictable annual funding of about USD 1 million to fund four key areas at a rate that is commensurate with Niue's absorptive capacity: a) enhanced enforcement and management capabilities, b) sustainability, climate resilience, and risk reduction; c) capability building; and d) opportunity cost mitigation. The NOW Initiative will build a Monitoring, Reporting, and Verification system to track and report on the use of funds for the Ocean Conservation Commitments and other donations.

ctbctb8/iStock

The Ross Sea Region Marine Protected Area

By The Pew Charitable Trusts

The Ross Sea Region Marine Protected Area (RSMPA) is the largest MPA in the world, covering more than two million square kilometers of the Southern Ocean—larger than France, Germany, Italy, and the United Kingdom combined. This MPA went into force January 1, 2017, after nearly 20 years of work—from conception to designation—at the Commission for the Conservation of Antarctic Marine Living Resources (CCAMLR).

The RSMPA involved a multi-faceted approach from various stakeholders, including NGOs, philanthropic organizations, and high-level politicians. The lessons learned from this process can inform future initiatives aimed at safeguarding ocean biodiversity and ecosystem services through very large high-seas MPAs, which will likely become relevant as the global community seeks to implement 30 percent protection by 2030.

There were five key stakeholder groups and tactics crucial to this campaign's success:

- **Philanthropic organizations:** Philanthropy provided critical and longstanding support to the campaign for the Ross Sea Region MPA by funding research, policy development, stakeholder engagement, and providing the resources effective advocacy.
- **Scientists and research:** The campaign effectively used science to demonstrate the ecological significance, vulnerability, and unique biodiversity of the Ross Sea region. This was important to provide a solid foundation of evidence that can influence decision-making and garner support.
- **Non-governmental organizations:** NGOs played a crucial role in advocating for the RSMPA including by conducting research, raising and sustaining awareness about the region's importance, and encouraging diplomatic negotiations to advance the designation.
- **High-level political pressure**: Diplomatic influence was instrumental in securing Russian and Chinese support for the proposal. To break the deadlock, the United States and New Zealand used their diplomatic influence and applied high-level political pressure by convening multiple bi-lateral meetings.
- **Public awareness and communication:** Raising public awareness through media outreach, educational initiatives, and public events helped build public support and created pressure on decision-makers. Various communication channels, including social media, helped engage a broader audience and mobilized support for the Ross Sea campaign.

There are three key lessons learned from the Ross Sea Region MPA:

- **Collaboration is crucial:** The success of the Ross Sea MPA campaign relied on collaboration and stakeholder engagement. NGOs, scientists, philanthropists, and governments worked together leveraging their expertise and resources to achieve a common goal. Building coalitions in key countries was critical, fostering dialogue between scientists and policymakers, coordinated public and media outreach, and engaging diverse stakeholders. Involving stakeholders from the outset and addressing their concerns can lead to more inclusive decision-making processes and better, more durable outcomes.
- **Long-term commitment:** The campaign for the Ross Sea MPA required sustained efforts from all stakeholders to overcome obstacles, such as Russia's invasion of Crimea, and maintain momentum.
- **Commitment at the highest diplomatic levels:** The process of creating the Ross Sea MPA high-level (presidential and ministerial level) diplomatic negotiations among multiple nations, especially when it came to bringing Russia and China on board.

In terms of implications for future work, the Ross Sea MPA serves as an important precedent for the establishment of large-scale high-seas MPAs. It highlights the potential for protecting vast oceanic regions and preserving unique ecosystems, while also underscoring the importance of cooperation and collaboration among and between nations, NGOs, and philanthropic organizations to sustain the momentum needed. Additionally, it demonstrates the need for sustained and well-funded efforts to maintain pressure on problematic countries especially when dealing with a consensus-based decision-making body.

Flammulated/iStock

CASE STUDY

Advancing Area-based Marine Conservation in South Africa

By WILDTRUST

South Africa has recently signalled full commitment to contributing to the 30×30 global protection target for both land and sea. This quantum leap for marine conservation is inextricably linked to flexible philanthropic funding support that empowered key NGOs to campaign strongly for bold action, and to support government to overcome obstacles. Significant in this regard is the launch of the first initiative in Africa to develop a 30×30 Implementation Plan, a collaboration between a collective of NGOs and government. Following a national 3-day workshop, identification of immediate steps for achieving short-term wins for South Africa's ocean are now underway.

South Africa's MPA journey has been challenging. Roadblocks have included an ocean economy drive that prioritizes offshore oil and gas as a competing use of space, problematic legacy issues around MPA establishment that undermine social license, and capacity limitations that hamper implementation and management effectiveness. With progress deadlocked for decades at only 0.4% protection of the continental exclusive economic zone, the "Phakisa Ocean Economy" process initiated in 2014 brought an opportunity to advance protection as a sustainable "unlocking" of the ocean's economic potential. Through this process, an additional five percent of key area for protection was quickly identified with stakeholder consultations largely complete by 2016. However, this progress stalled due to opposition from the oil and gas sector, who had been allocated exploration and exploitation leases for 95 percent ocean space.

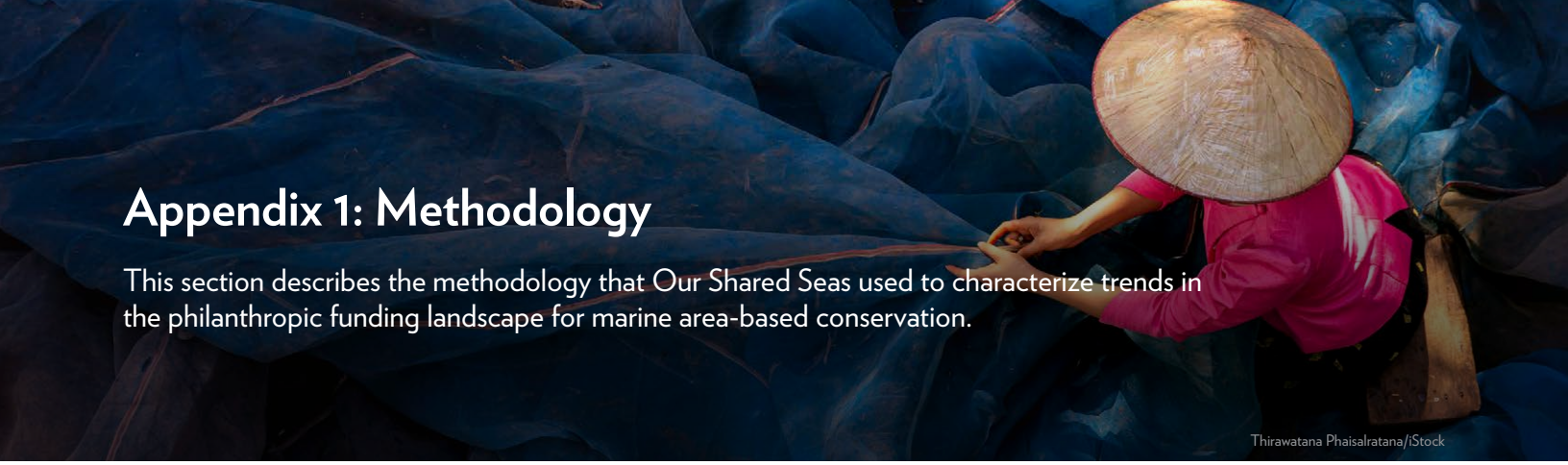
In 2018, to help unlock this impasse, Oceans 5 provided its first grant to WILDOCEANS, the marine program of WILDTRUST, for a strategic campaign to get 20 new and expanded MPAs finalized. Encountering reluctance to further protections until these new MPAs were implemented, the WILDOCEANS MPA team was able to pivot from its advocacy approach to capacity support for the Government to develop MPA Management Plans. This paved the way for support from other donors (i.e., Blue Nature Alliance) to proceed with the stakeholder processes to get the plans gazetted.

The power of matching private funding with larger public sources like the Blue Action Fund and Green Climate Fund has also been evident in WILDTRUST's work to further MPA expansion. WILDOCEANS has used this co-funding model for South Africa's two largest MPAs, the new uThukela MPA and expanded iSimangaliso MPA, to provide significant equipment, MPA manager/ranger training, and operating funds. The combined policy-infrastructure approach will ultimately deliver tangible benefits for adjacent communities through job creation, livelihood support and MPA benefit awareness. These projects have catapulted WILDOCEANS to the forefront of innovative sustainable financing mechanisms, not only for these two individual MPAs but for the broader 30×30 agenda. These initiatives are also important in providing case studies of effectively managed MPAs, to dispel negative perceptions about their value, and to provide assurance for the government on a pathway to achieve 30×30.

Two other tactics were key to getting South Africa to embrace a 30×30 agenda. For the first, WILDOCEANS, Youth4MPAs and the World Surf League organized the Africa 30×30 Youth Summit, mobilizing an important political constituency. The second was the "30×30Now!" campaign, primarily funded by the Campaign for Nature, witnessed President Ramaphosa announce support for 30×30 prior to COP15 in Montreal.

The initial support provided by Oceans 5 in 2018, was catalytic for the growth of the WILDTRUST's new marine program. In 2019, WILDOCEANS had only four projects in South Africa. In 2023, just five years later, the WILDOCEANS program has 23 stable projects with objectives to protect marine biodiversity and coastal communities. WILDOCEANS and South Africa are real-time examples of how investing in geographies underserved by private philanthropy and yield cascading results.

Bkamprath/iStock



Thirawatana Phaisalratana/iStock

Appendix 1: Methodology

This section describes the methodology that Our Shared Seas used to characterize trends in the philanthropic funding landscape for marine area-based conservation.

Data sources

To develop a comprehensive database of philanthropic funding for marine area-based conservation, Our Shared Seas gathered grant-level funding data from four sources:

- Direct outreach to foundation staff of the top 80 marine funders;
- Candid, a US-based 501(c)3 nonprofit organization that tracks philanthropic funding from foundations to grantee recipients;
- The European Foundation Center, which provided estimates of European funders in the marine sector by issue area and geography; and
- IRS Form 990 tax documents and foundation websites.

Inclusion versus exclusion

This report considers philanthropic funding for marine area-based conservation, including Marine Protected Areas (MPAs) and other effective area-based conservation measures (OCEMs). Before searching for and reviewing grants, OSS developed the following taxonomy for deciding whether a grant should be considered as contributing to marine area-based conservation.

Table 1: Inclusion versus exclusion categories

Group 1: Direct relation: Include	Group 2: Manual review to include or exclude	Group 3: Exclude
30×30	Capacity building	Blue carbon
Core support for MPA-oriented organizations	Communications	Coral
Grants with relevant place names, e.g., Bird's Head, Blue Abadi, Easter Island, Coral Triangle, Eastern Tropical Pacific	Community-based conservation	Corals
	Ecosystem-based management	Deep sea or deep-sea mining
	Indigenous and/or community-led conservation	Fisheries management
High Seas	Livelihoods	Mangroves, seagrass, kelp, etc.
LMMA	Nearshore protection / restoration	Marine rights
Marine monument, park, or reserve	Training	Marine tenure
Marine Protected Area(s)		Sharks, sea turtles, rays, etc.
Marine spatial planning		Small-scale fisheries (SSFs)
Marine zoning		Species protection or wildlife protection
MPAs		
Nearshore exclusion zone		
OECMs		

Keyword search

The inclusion versus exclusion table above was expanded into a list of keywords used to query the Our Shared Seas ocean funding database and extract grants which were either definitely or possibly contributing to marine area-based conservation. The following keywords were searched for in the database, using a tiered search for "Default Include" words first, followed by "Possibly Include," and "Default Exclude."

ILLUSTRATIVE EXAMPLES

The following examples provide illustrations of how Our Shared Seas applied this taxonomy in practice:

- **Enabling conditions:** These grants were either included, excluded, or partially applied depending on whether there is a direct connection to protected area work. For instance, certain funders implement strategies focused on supporting Indigenous-led conservation efforts to protect marine ecosystems. The full amount of these grants were included. In contrast, if a grant focused on general capacity building efforts without any mention of protected areas, then it was excluded.
- **Core support grants to organizations that work only on MPAs:** The entirety of the grant was applied.
- **Core support grants to organizations that work on multiple issue areas, including protected areas:** OSS estimated the proportion of a grant applied based on the CSO's priorities (e.g., We applied one-third of a core support grant if a CSO works on fisheries, MPAs, and pollution. If an organization works on fisheries and MPAs, then we applied 50% of the grant.)
- **Applied coral research:** Excluded, given focus on species protection.
- **Habitat protection:** Efforts to conserve/restore habitat (e.g., lagoons, estuaries, mangroves, kelp) were excluded, presuming that there was no mention of a protected area designation.

Table 2: Keyword search terms

MPA: Default Include		MPA: Possibly Include	MPA: Default Exclude
30 x 30	Mafia-Rufiji-Kilwa	Area beyond national jurisdiction	bird
30×30	marine park	BBNJ	blue carbon
30%	Marine protected areas	Biodiversity beyond national	coral
aire marine protégée	marine reserve	ecosystem based management	data limited
aires marines protégées	marine sanctuary	ecosystem-based management	deep sea
aire protégée	Marine spatial plan	EBFM	deep-sea
aires protégées	Mesoamerican Reef	EBM	DLM
Aires Spécialement Protégées d'Importance Méditerranéenne	monument	Indigenous	dolphin
AMP	MPA	community led	elasmobranch
Bird's Head	MPAs	community-led	fisheries management
Birds Head	MSP	community based	harvest strategy
Birds' Head	nearshore exclusion	community-based	human right
Blue Abadi	near-shore exclusion	IP & LC	kelp
Blue Nature Alliance	OECM	IPLC	mangrove
Blue Prosperity	other effective conservation measure	habitat protection	marine speci
Coral Triangle	Papahānaumokuākea	nearshore protection	mining
Eastern Tropical Pacific	Phoenix	near-shore protection	ray
exclusion zone	Pristine Seas	livelihood	RBM
high sea	protected area	capacity	rights
LMMA	Sulu Sulawesi	communication	seagrass
locally managed area	Sulu-Sulawesi	training	seaweed
locally-managed area	Sunda Banda	offshore wind	seal
	Sunda-Banda	genetic resource	sea lion
	Sustaining California's Ocean	Law of the Sea	shark
		No take	small scale fish
		No-take	small-scale fisheries
		UNCLOS	specie protection
			species protection
			SSF
			tenure
			turtle
			wetland
			whale
			wildlife
			wildlife protection

Geography taxonomy

The Our Shared Seas team manually reviewed and applied a "Tier 1" and "Tier 2" geography tag to each grant according to the following table:

Table 3: Geography taxonomy

Tier 1 Tag	Tier 2 Tag	Note
Africa	Central Africa Eastern Africa Northern Africa Southern Africa Western Africa Unspecified (Africa)	This list reflects the UN Country Listings for Africa.
Antarctic	Antarctic	
Arctic	United States Canada Rest of Arctic Unspecified (Arctic)	
Asia	China India Indonesia Japan Korea Rest of Asia Unspecified (Asia)	
Caribbean	Caribbean	Includes Caribbean islands and surrounding areas. Atlantic coastal countries in Central and South America are tagged to the Central and South America Tier 1 listing. (e.g., Belize is tagged to Central America.)
Central America	Eastern Tropical Pacific Rest of Central America Unspecified (Central America)	• Includes Atlantic coastal countries (e.g., Belize) • Eastern Tropical Pacific grants include funding to Costa Rica, Panama, Colombia, and Ecuador (including Galapagos).
Europe	Europe	• Includes Atlantic Islands
Global	Global	• Science grants are tagged as Global • In general, grants <$100k with multiple Tier 1 country listings are tagged as Global.
High Seas	High Seas	
Middle East	Middle East	
North America	Canada Mexico United States Unspecified (North America)	• Gulf of Mexico grants are assigned to the closest relevant geography (U.S. or Mexico). • Grantee can be a helpful indicator.
Oceania	Australia New Zealand Pacific Islands Philippines Unspecified (Oceania)	Pacific Islands include: Northern Mariana Islands, Federated States of Micronesia, Fiji, French Polynesia, Kiribati, the Marshall Islands, Nauru, New Caledonia, New Zealand, Palau, Solomon Islands, Tonga, Tuvalu, Vanuatu, and Wallis and Futuna
South America	Brazil Chile Eastern Tropical Pacific Peru Rest of South America Unspecified (South America)	Eastern Tropical Pacific grants include funding to Costa Rica, Panama, Colombia, and Ecuador (including Galapagos).
Unspecified	Unspecified	Location of work is not indicated or discernable from the grant description.

Grant splitting

Grants were counted based on their commitment (rather than disbursement) schedule. To avoid lumpiness in trends over time, grants over USD 5M were annualized to show average commitment over the grant duration. For instance, a USD 30 million commitment lasting five years was split into five grants of USD 6 million per year.

Manual review

Grants which received a tag of "Default Include" or "Possibly Include" were manually reviewed to confirm the results of the keyword search. If a grant only partially contributed to marine area-based conservation, a percentage was applied to the grant total to separately track the funding for MABC. This process was also done for general support grants to large NGOs working across multiple marine issue areas. Additionally, the highest value grants across the Our Shared Seas funding database were manually reviewed, regardless of the results of the keyword search. Initial results were vetted and refined in consultation with experts in the marine area-based conservation space.

Sergio Izquierdo/WCS Guatemala

Our Shared Seas provides timely data, research, and insights to support ocean conservation policy, practice, and philanthropy. This independent resource synthesizes threats to ocean health and elevates evidence-based solutions for the ocean. Learn more at www.oursharedseas.com.

OUR SHARED SEAS

CEA Consulting helps transform business practices, public policies, nonprofit organizations, and philanthropic strategies to improve environmental outcomes. We help our clients better understand complex topics and support their strategic decision-making through rapid and robust analysis, expert thought partnership, knowledge exchange across diverse stakeholders, and skilled project management. Visit ceaconsulting.com.

CEA CONSULTING