International Conservation Funding in the Amazon: An Updated Analysis









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EXECUTIVE SUMMARY

he Amazon is one of Earth's great wonders. It is home to more than 20 million indigenous peoples and traditional communities, and remains the planet's largest intact rainforest. A critical source of natural capital for the communities within and surrounding it, the Amazon also provides one-fifth of all the world's fresh water and helps mitigate global climate change.

Recognizing the global significance of the Amazon biome, the Gordon and Betty Moore Foundation has supported communities and governments in the region since 2001 by investing more than \$380 million through its Andes-Amazon Initiative, helping these partners in their work to designate and improve management in more than 170 million hectares of indigenous lands and protected areas.



The Gordon and Betty Moore Foundation commissioned this analysis, a follow-up to a similar study in 2014, to understand the current funding in the Amazon region, and identify funding gaps and needs. To inform this study, a database tool was developed to store, analyze and search the data. This "Amazon Funding Tool" can be accessed online **here**. The full data set includes 43 different funders who invested approximately US\$1.07 billion for the 2013-2015 time period. Among other analysis findings:

- Over half of historically large Amazon conservation funders appear to have reduced their commitments, while a handful of anchor funders have maintained theirs.
- At the same time, substantially higher contributions identified from three very large bilateral funders (Norway, Germany and USAID) make up the gap.
- The only potential sources of major new funding we see are multilateral climate-related investment funds, but their likely commitments or focus in the Amazon region (vs. other geographies around the world) are not certain.
- Seven of the 10 top funders are bilateral or multilateral institutions (along with the Gordon and Betty Moore Foundation, Fundo Vale and WWF), and are by far the largest funding categories (around 86 percent).
- During this time range, support for those in the region who are working to create protected areas and improve management garnered the most investment (more than \$250 million), and bilateral institutions were the largest category by total funding amount (more than \$750 million).
- Similar to the previous study, this study found that less than 5.5 percent of funding from all sources supports projects related to drivers of deforestation (i.e., agriculture expansion, cattle, infrastructure and extractive industries).
- The greatest proportion of funding has been directed to protected area creation, management and finance. In the previous study, the largest category was legislation, policies and compliance with enforcement.
- Recipient grantees for all funders include: 1) national and sub-national governments (now 49.0 percent), 2) national or local NGOs (17.8 percent), 3) subnational or local governments (14.2 percent), and 4) international NGOs (11.8 percent). When foundations are considered alone, recipients of funding skew more heavily to NGOs and research institutions: 1) national or local NGOs, 2) international NGOs, 3) research institutions, and 4) other.
- Across all funder types, Brazil is the largest recipient of funds (~53 percent), receiving more than three times the funds allocated to Peru (~16 percent), and more than six times the funds allocated to Ecuador (~8 percent) or Basin-wide (7.4 percent). This reflects a similar pattern that emerged in the previous analysis.

Having recommitted to supporting conservation efforts of communities and governments in the Amazon biome, the Gordon and Betty Moore Foundation's Andes-Amazon Initiative appreciates the opportunity to gather and study — and now, with this report, to share — updated data on global funding for conservation in the region. We hope that the analysis findings and accompanying **Amazon Funding Tool** prove useful to others in the Andes-Amazon region and the conservation community who work to safeguard this exceptional place.

INTRODUCTION

THE AMAZON

panning eight countries and one territory, the Amazon—Earth's largest remaining tropical rainforest—stretches from the eastern slopes of the Andes to the Atlantic Ocean. With a relatively low human population density, it provides one-fifth of the world's fresh water and is home to the planet's most diverse collection of birds, mammals, freshwater fish and plants. Its vast forests help mitigate global climate change. In addition, it is home for more than 20 million indigenous peoples and traditional communities.

Recognizing the global significance of the Amazon biome, the Gordon and Betty Moore Foundation has supported communities and governments in the region by investing more than \$380 million through its Andes-Amazon Initiative, helping these partners in their work to designate and improve management in more than 170 million hectares of indigenous lands and protected areas. In addition, the importance of supporting these conservation efforts across the biome has caught the attention of several other donors around the world. We commissioned this follow-up study to understand the current funding landscape, to evaluate our own role within it and to uncover any potential funding gaps. We also hope that the results and accompanying study tool will be useful to others in the Andes-Amazon region and the conservation community who work to safeguard this exceptional place, for future generations.



RESEARCH OBJECTIVES AND METHODS

In 2014, the Gordon and Betty Moore Foundation commissioned Gonzalo Castro de la Mata and Sait Riega-Campo (Environmental Services) to conduct an Amazon funding landscape analysis for 2007-2012¹ to understand its Andes-Amazon grantmaking in the context of other conservation funding for the region.

In 2016, the foundation commissioned Conservation Strategy Fund (CSF) under David Strelneck's leadership to conduct a similar study for 2013-2015 to update and refine the data. Specifically, this study investigated the following:

- How much money was invested in conservation in the region from 2013 to 2015?
- Who are the largest international funders of conservation in the Amazon?
- What is the main strategic focus of their investments?
- Which countries and types of organizations are the largest recipients of those funds?
- Does the strategic focus of the investments vary by funder type?

This study used a variety of methods to gather and analyze data from environmental funders.² These methods included a questionnaire sent to known funders, an online search of funding data, follow-up interviews with representatives of specific funders and verification of the data and analysis by the funders themselves. A database tool was developed to store, analyze and search the data, and the findings were reviewed and validated by the funders who participated, or confirmed against their formal reports and online data sources. As with the 2014 funding analysis, this study helped us to refine our understanding of the broad funding trends and patterns in recent years in Amazon conservation.

Like the previous study, the current analysis traced funding to original sources to avoid double-counting. This methodology increases the accuracy of data for the actual funding levels, but it should also be noted that in some cases, the methodology decreases precision regarding the way that funding subsequently divides between primary strategies — tracing data to original sources takes us further from the direct field work. However, this analysis also incorporated a few methodological improvements:

- The current study spread funding across the duration/years of each grant or project, while the historical study allocated most funding to the start year of a project. Comparisons between studies are therefore indicative but not precise.
- The current study identified strategies based on each funder's primary intent for how to reduce deforestation or regenerate forest ecologies. Consequently, some of the data themes/conservation strategies differ between studies; the comparisons in the following charts are therefore also indicative but not precise.
- This study also increased resolution of funding levels significantly for international bilateral donors, e.g., this study includes substantially more (and more accurate) data about Norway, Germany, and the United States.

¹ Castro de la Mata, Gonzalo and Sait Riega-Campos. 2014. An Analysis of International Conservation Funding in the Amazon. Gordon and Betty Moore Foundation, Palo Alto, California.

² Funding from host country governments, while important from a number of perspectives, is not included because of the substantial double counting risks.

DEFINITIONS

The following definitions were used:

Time frame: All the data for this analysis cover 2013-2015. The previous analysis spanned 2007-2012, with a few grants for 2013 also included. Therefore, small overlap might exist.

Geography: In terms of geography, the study includes projects both funded and implemented in the Amazon biome, including the following countries or territories:

Bolivia

Ecuador

- Brazil
- Colombia

- Cuman
 - GuyanaPeru

- Suriname
- Venezuela
- French Guiana

Basin-wide: Used as a category when data could not be allocated to a specific country, or when the project was implemented in two or more countries.

Conservation strategies: Funding was allocated across the following categories, based on our understanding of the primary strategy or theory of change of each funder. In trying to track funding in this way, against top-level strategies rather more discrete implementation actions, we wanted to learn not only how the funding is allocated, but also how the pool of funders think about distinct approaches. While yielding very interesting results, this has also produced a different list of strategies (see table below) than the one used in the previous study. The changes between this list and the previous study also reflect shifting emphasis in forces driving conservation priorities in general, such as the increase in attention to climate change-related issues over time.



TABLE 1. LIST OF CONSERVATION STRATEGIES USED TO CATEGORIZE THE FUNDING

Analysis: Strategic, Economic or Technical	Analyzing and comparing conservation approaches, policies, economic valuations or strategies
Big Infrastructure (roads, dams, etc.)	Mitigating the negative impact of road development, dams, and other large physical infrastructure projects
Capacity Building, Education, Training	Providing institutional support or training to enable civil society, indigenous, commercial or government interests to fulfill conservation roles
Climate Change Adaptation	Increasing social and ecological resilience and reducing risks of the likely impacts of climate change
Climate Change Mitigation (non-REDD)	Efforts to reduce or sequester greenhouse gas emissions and thus reduce climate change (non-REDD)
Commercial Agriculture	Mitigating the negative impact of large-scale commercial agriculture (beef, soy, coffee, etc.)
Compliance/Enforcement	Civil society or governments conducting oversight of landholders, companies, banks, policy institutions, international markets, agreements, etc.
Extractive Resources (Mining, Oil/gas+)	Mitigating the negative impact of mining, oil/gas, etc.
Governance Systems	Enabling civil society, indigenous, commercial or government interests to organize and govern effectively
Indigenous Peoples & Lands	Supporting the ability of indigenous peoples to lead the management and conservation of forest regions
Integrated Landscapes, Land Use Planning	Integrating multiple and/or holistic landscape management approaches in specific geographic areas
New Finance Mechanisms	Developing new types of funds or financial market mechanisms that draw more conservation funding into the Amazon
Payment for Ecosystem Services (PES)	Developing markets or enterprises to value and compensate forest stewards for ecosystem services like water, pollination, genetic diversity, etc.
Protected Areas Creation & Management	Developing, strengthening and maintaining Protected Areas
Public Communications & Transparency	Shifting politics, consumer behavior or compliance by generating and distributing public information
Public Policy Development & Admin	Developing and administering national, local and international public policies to strengthen Amazon conservation (non-REDD)
REDD Programs & Policies	Design or implementation of REDD+ policies, methodologies, programs, projects targeted at the Amazon
Rural Livelihoods	Reducing poverty and fostering sustainable local economies, thus shifting the destructive & constructive pressures on forests
Science Research & Analysis	Scientific research or rapid assessments of ecology, species or climate
Species Conservation	Focus on protection or trafficking of particular species of plants or animals
Timber/Forestry	Mitigating the negative impact of commercial timber harvesting
Upstream Markets & Value Chains	Changing international business practices and consumer markets in ways that reduce Amazon deforestation
Other	Other primary strategies not included on this list, or unclear primary strategies based on the available data

Funders: Funders were assigned to the following categories:

- Foundations
- Multilateral institutions³
- Bilateral institutions
- International environmental NGOs
- Private sector funders

Grantees: Funding recipients were assigned to the following categories;

- International NGOs
- National or local NGOs
- National governments
- Subnational governments or local governments
- Academic institutions
- Researchers or research groups



3 The current study includes loans from these institutions, in principle, although we did not find or report many of relevance for the following reasons: 1) Loans we did identify seemed to emphasize general institutional strengthening or multilateral collaboration in the environment sector, rather than work directly affecting Amazon conservation. 2) The World Bank's general decrease in action in the Amazon relative to the timeframe of the previous study is important, because the World Bank represented a large portion of the loan data considered in the previous study. 3) We did not receive detailed information on the World Bank's current \$150 million conservation loan to Acre, Brazil.

IMPORTANT CONSIDERATIONS ABOUT THE DATA

To avoid counting data more than once, all funding for this study was traced as close to its "original source" as possible within the project scope and timeframe, to the originating philanthropy, government agency or multilateral fund. This supports the quality of the baseline funding data, but also implies certain tradeoffs:

- Tracing the funding to top-level sources sometimes resulted in lost precision in the allocation of that funding among "primary conservation strategies." This is because the higher-level sources that ensured the integrity of the overall funding numbers are also farther from the actual field work and implementation, and some of them therefore provided general approximations rather than specific accounting of funding breakdown among strategies (and sometimes among recipient types). Furthermore, this effect is magnified because it applies most to the largest funders.
- Another manifestation of this tension was our decision, for the purpose of this study, to assign \$500 million+ of bilateral funds to the Amazon Fund as a separate funder in Brazil, whereas those resources actually originated from Norway, KfW in Germany, and Petrobrás. This data was separated out in order to provide more clarity around funding levels and actual funding years for the various primary conservation strategies in Brazil (because this very large allocation otherwise dwarfs all other funding in the region, inhibiting our ability to discern meaningful funding differences between different primary conservation strategies). This decision is also consistent with the rest of the study, because the Amazon Fund does in fact identify priorities and allocate funding independently, per the intent of the original funders. Furthermore, separating out this data allowed allocation of that funding against the primary strategies being funded for actually conserving the forest, rather than as a single conservation incentive payment to Brazil. In any future assessment, this tension might warrant two lines of funding analysis: what is motivating the funder to contribute, vs. what direct conservation strategies are being funded.

The funding levels of large international NGOs are substantially lower than indicated in the previous funding landscape analysis. This is because, as noted above, in this subsequent study all funding was traced to the degree possible back to the originating funder, such as a foundation or government entity. The only funding allocated to the large NGOs in the current data, therefore, is money they raised independently from sources not included elsewhere in our study (e.g., often a substantial aggregation of private sector and individual donors that the NGO generated on its own).

Within the primary conservation strategies, some innovative projects were categorized as "other" because of their unique characteristics or relatively low funding levels. When reviewing emerging solutions or drivers of conservation, these might still be worth considering, and more information can be found in the **Amazon Funding Tool**. Examples include the following:

- Use of rural agro-forestry approaches with local communities to recuperate and begin to regenerate vibrant ecosystems in areas previously deforested.
- Other integrated community-based conservation and economic development initiatives.
- Dedicated resources, at large scale, for fire-fighting and prevention in the forest.
- Focus on local innovation and social entrepreneurs, rather than top-down program design, as the starting point for finding effective and new solutions. At least two Brazil-based foundations indicated their intent to shift additional funding resources into this arena.
- Environmental safeguard analysis of financial institutions whose work affects the Amazon.



RESULTS

he full data set includes 43 different funders who invested approximately US\$1.07 billion for the 2013-2015 time period. During this time range, support for those working to create protected areas and improve management garnered the most investment (more than \$250 million), and bilateral institutions were the largest category by total funding amount (more than \$750 million).

The number of funders increased from 24 in the previous study to 43 in the current study for three reasons. First, some additional multilateral funds targeting climate change issues emerged during this period. Second, we addressed a specific gap, identified in the previous study, in tracing bilateral funding from multiple European and other countries. Third, we were afforded more time for the current study, enabling us to trace and include additional funding leads when specific allocations to Amazon conservation were identified.

FUNDERS INCLUDED IN THIS STUDY

Private sector

Various

NGO

Wildlife Conservation Society Critical Ecosystem Partnership Fund (CEPF) Conservation International Rainforest Foundation Norway The Nature Conservancy World Wildlife Fund

Foundation

The Overbrook Foundation Mitsubishi Foundation for the Americas Tinker Foundation Fundación Avina MacArthur Foundation Skoll Foundation C. S. Mott Foundation Bobolink Foundation Ford Foundation Anonymous foundation Andes Amazon Fund & Bluemoon ClimateWorks Fundo Vale Gordon and Betty Moore Foundation

Multilateral

World Bank Green Climate Fund (UNFCCC) Forest Carbon Partnership Facility European Union United Nations - REDD Forest Investment Program Interamerican Development Bank Corporación Andina de Fomento Global Environmental Facility

Bilateral

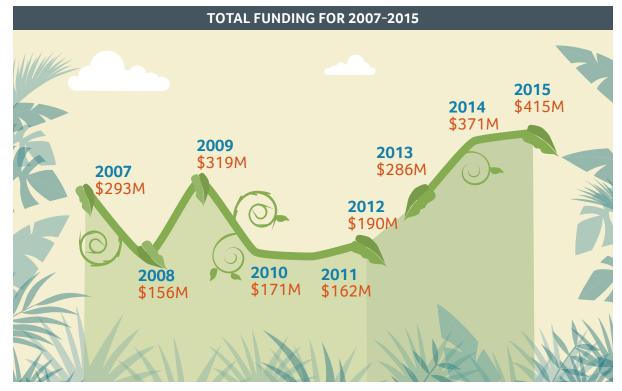
Switzerland (SECO, SDC, COSUDE) Italy Spain Korea Finland Sweden & Netherlands Denmark - DANIDA Belgium United Kingdom (DFID, DEFRA, DECC) USA (USAID, FWS) Norway (NICFI, NORAD and related agencies) Germany (KFW, IKI)

HISTORICAL COMPARISON: FUNDING BY YEAR

The study also compared findings to those from the analysis of funding during years 2007-2012. The figure on the following page illustrates the total funding per year of both studies. As explained above this apparent increase of funds is attributed to more research time and efforts to cover funders not portrayed in the previous study. To the degree that it could be identified and specified accurately, funding allocated to institutional strengthening or general institutional operations of national or multilateral government or environmental programs was not reported. For example, some funding data initially obtained included general operational funding for environmental agencies of the countries affecting the Amazon Biome, and operational funding for some international climate change and other initiatives which also touch

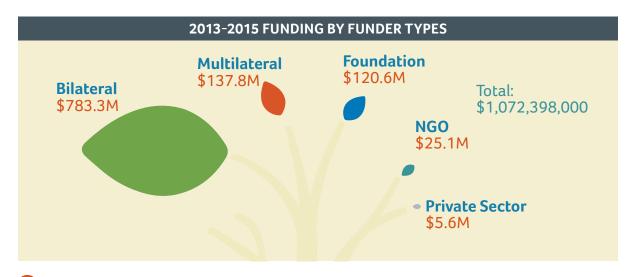
on the Amazon Biome as well as many other locations and topics worldwide. Any data pertaining to specific initiatives in the Amazon Biome was retained in this study, but the more general institutional and operational funding was not.

This study identified several high-level findings:



RANK ORDER OF FUNDING TOTAL BY TYPES OF FUNDERS:

As in the previous study, bilateral and multilateral institutions are the largest donors for Amazon conservation (about 86 percent). Bilaterals account for US\$783.3 million or 73 percent; multilaterals \$137.8 million or almost 13 percent. The foundations in this analysis accounted for US\$120.6 million or 11 percent of the total funds analyzed in this study, from 2013-2015. Meanwhile, NGOs accounted for US\$25.1 million or two percent and the private sector accounted for \$5.6 million or 0.5 percent.

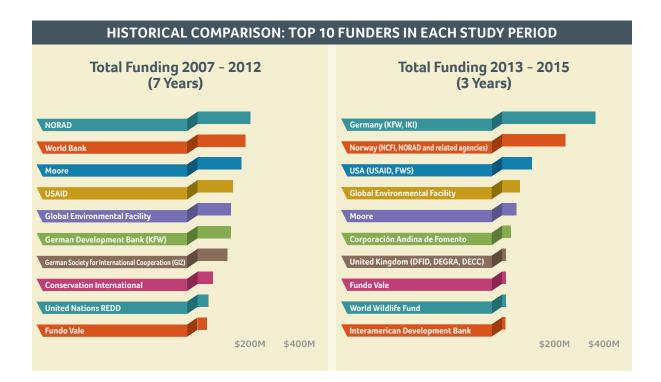


SIFTING THE DATA

The figure on the facing page displays the full data set of 43 funders who collectively contributed to the total amount invested in Amazonian Conservation.

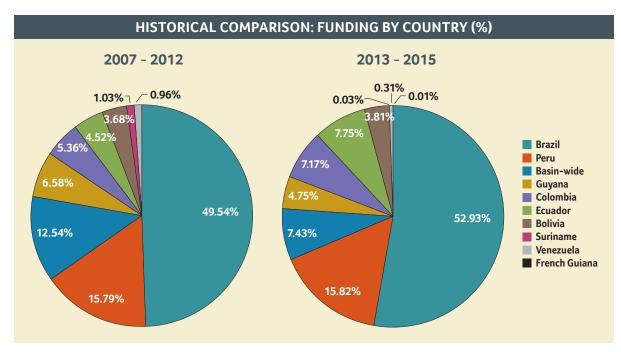


Seven of the top ten funders from 2013-2015 are bilaterals or multilaterals. The same was true in the prior study's timeframe, 2007-2012, but the individual institution rankings have shifted among the top 10.

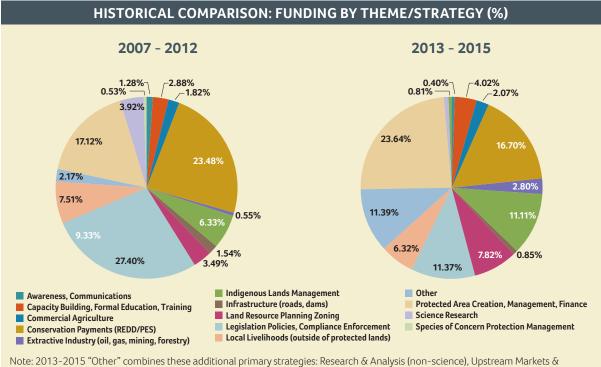


Changes from the last study's rankings of the "top 10 funders" of the Amazon, noted above, resulted from having a longer time period to contact individuals at institutions and conduct this study, which increased quality and extent of the dataset, and also from having had an opportunity to fill previous gaps in sources of funding.

The following figure shows the total amount by recipient country. Brazil remains the recipient of the largest allocation, as it was in the prior study period, accounting in this case for more than 50 percent of all funds. Together, Brazil and Peru receive the greatest percentage of overall funding for conservation — they likewise represent the two countries containing the largest proportion of the Amazon biome. Brazil represents 60 percent of the Amazon biome and received 53 percent of total funding, and Peru represents over 11 percent of the Amazon biome and received 16 percent of total funding. The percentage for Brazil has increased since the previous analysis, which reported then that Brazil received 50 percent of total funding. This increase for Brazil is explained by the donations made to the Amazon Fund.



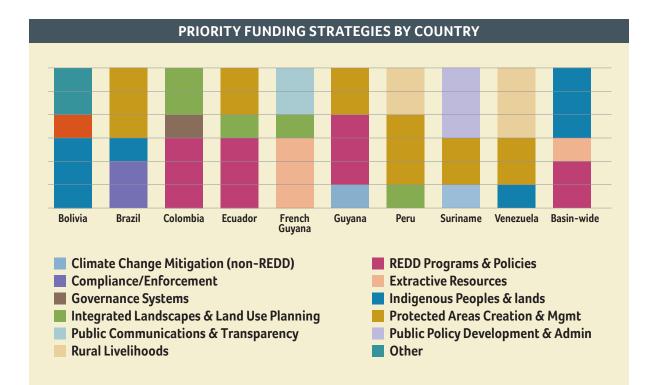
The next figure shows total funding allocation by strategy, with data from the most recent study used in comparison to strategies identified and tracked in the 2014 analysis. The strategies with the greatest level of investment today include protected area creation, management and finance (23.6 percent) and conservation payments (16.7 percent). Support for the former, protected areas, has long been a priority among private foundations. The latter reflects funders' recognition of the importance of market-based mechanisms for conservation effectiveness. As noted in 2014, support for this strategy was negligible even just a little over decade ago.



Value Chains, Finance Mechanisms, Climage Change Adaptation, Climage Change Mitigation (Non-REDD), Other.

When compared with the patterns for all funders combined, integrated land-use planning among foundations replaces REDD among all funders within the top three categories of strategies that receive the most investment (protected area creation, management and financing and indigenous peoples and lands are the other two of the top three strategies for both all funders and for only foundations). This reflects continued emphasis and reliance on protected areas as a key strategy (necessary if not sufficient) for reducing deforestation, as acknowledged for their efficacy in current literature (Nolte et al., 2013) and as embraced by Moore and other private foundations.

Although our analysis reveals these high-level conclusions about overall funding levels, it is also crucial to note significant variations in terms of priority strategies funded in the different Amazonian countries. For each Amazonian country/territory, we selected the three most-funded priority strategies. For example: for Brazil, the strategies that received the most funding are protected areas creation and management, followed by compliance/enforcement and indigenous peoples and lands. In Colombia the priorities ranked as REDD programs and policies, integrated landscapes and governance systems. These different priorities reflect each country's varied needs as well as differing windows of opportunity.

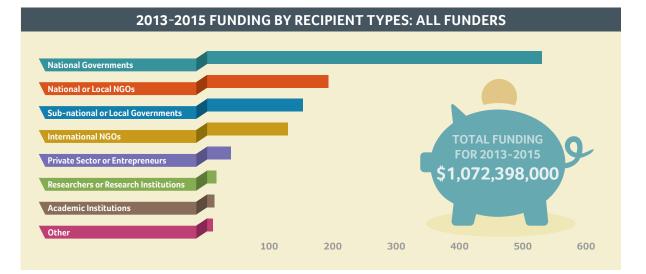


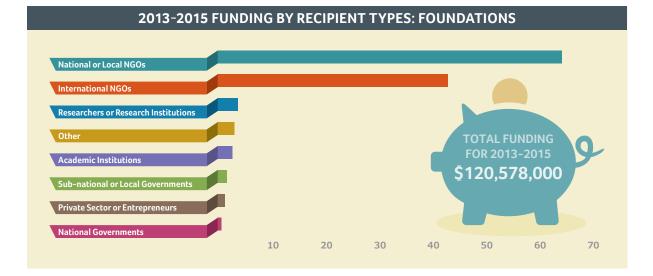
The following figure shows funding by strategy for foundations alone, as compared to the first figure in this section, which showed funding by strategy for all funders. The Gordon and Betty Moore Foundation remains the largest funder for conservation in the region among private foundations.

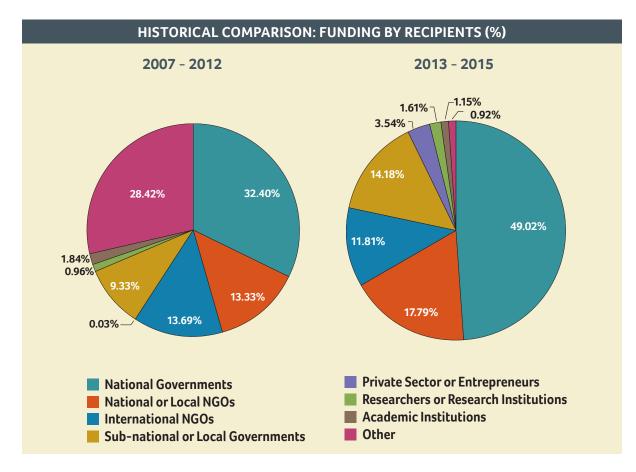


2013-2015 FUNDING BY STRATEGY: FOUNDATIONS

Total funding to recipient organizations is diversified and primarily focused on four grantee types: 1) national and sub-national governments (now 49.2 percent), 2) national or local NGOs (17.8 percent), 3) subnational or local governments (14.2 percent), and 4) international NGOs (11.8 percent). When bilateral and multilateral funding is excluded from the analysis, it becomes evident that while bilaterals and multilaterals focus their funding on national governments, foundations rely far more on local, national and international NGOs, as well as research institutions. This shows a very similar trend in comparison with the previous study.







CONCLUSIONS

his analysis focused on current international funding supporting conservation work in the Andes-Amazon (2013-2015/\$1.072 billion from 43 funders), and offered a historical comparison to past funding trends in the region. The previous study (2007-2012) found 24 donors and a total of US\$1.34 billion. The increase in terms of numbers of donors reflects a longer data-collecting phase and more precise analysis. In addition, some multilateral funds targeting climate change issues have emerged during this period.

The current study indicates roughly \$100 million/year more in Amazon funding than reported in the previous study. The following factors contribute to this difference:

- Many funders have decreased their average annual funding from slight to moderate degrees, resulting in a total decrease in Amazon funding from these sources of nearly \$100 million per year. The largest among these is the World Bank, but the data indicate that 13 other funders have also decreased their average annual funding levels.
- On the other hand, average annual funding identified in the current study from USAID, Norway and Germany show a total increase of approximately \$160 million per year by those bilateral sources, compared to the previous study.
- Furthermore, the inclusion of funders that were not in the previous study (foundations, bilateral and multilateral sources) adds approximately \$27 million per year to the total.
- The aggregate results, therefore, show a higher level of funding now than in the previous study, even though the average annual funding levels for many of the funders have actually decreased.

Several high-level funding patterns emerge from this study:

TOP FUNDERS:

• Seven of the 10 top funders are bilateral or multilateral institutions (along with the Gordon and Betty Moore Foundation, Fundo Vale and WWF), and are by far the largest funding categories (around 86 percent). This finding is similar to that in the previous analysis.

BY STRATEGY:

- Most of the overall funding was invested in support for protected area creation, management and financing.
 - Predominant funding for protected areas is reflected even when multi- and bi-laterals are not included in the analysis.
- Similar to the previous study, this study found that less than 5.5 percent of funding from all sources supports projects related to drivers of deforestation (i.e., agriculture expansion, cattle, infrastructure and extractive industries).
- In the previous study, the largest categories were legislation, policies and compliance with enforcement, as well as Payment for Environmental Service REDD.

BY RECIPIENTS/GRANTEES:

Recipient grantees for all funders include: 1) national and sub-national governments (now 49.0 percent), 2) national or local NGOs (17.8 percent), 3) subnational or local governments (14.2 percent), and 4) international NGOs (11.8 percent). When foundations are considered alone, recipients of funding skew more heavily to NGOs and research institutions: 1) national or local NGOs, 2) international NGOs, 3) research institutions, and 4) other. This was likewise true in the previous analysis.

BY GEOGRAPHY:

Across all funder types, Brazil is the largest recipient of funds (about 53 percent), receiving more than
three times the funds allocated to the next highest recipient of funds, Peru (about 16 percent), Ecuador
(about 8 percent) and Basin-wide (7.4 percent. This reflects a similar pattern obtained in the previous
analysis.

This report reveals relevant, high-level information about funding trends and analysis. However, we also believe that an in-depth analysis, using the **Amazon Funding Tool**, would afford a better understanding of the singularities and differences among these trends in different countries or strategies.

The landscapes and watersheds of the Amazon biome hold a wealth of cultures, biodiversity, fresh water, ecosystem services—and hope for a planet faced with an irreversibly changing climate. Having recommitted to supporting conservation efforts of communities and governments in the Amazon biome, the Gordon and Betty Moore Foundation's Andes-Amazon Initiative appreciates the opportunity to gather and study — and now, with this report, to share — updated data on global funding for conservation in the region.





ACKNOWLEDGMENTS

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