

Establishment and Management of AMERB and ECMPO in North Patagonia: Identification of Activities, Costs, and Available Funding Sources



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I.- BACKGROUND ON WWF

WWF, the World Wildlife Fund, is one of the world's longest-running independent conservation organizations. It was founded in Switzerland in 1961 and currently has five million members, 4,500 employees, 75 offices worldwide and more than 13,000 projects in 157 countries.

To contribute to the conservation of the unique ecosystems identified in the Southern Chile priority sites, WWF has collaborated in the country, for several decades, together with Non-Governmental Organizations, public institutions, local communities, the private sector, universities and international organizations.

WWF Chile works to ensure that the unique biodiversity housed in the Southern Chile priority sites, both terrestrial and marine, are adequately represented in a system of effectively managed protected areas, that natural resources are used sustainably throughout the landscape, and that conservation is a commitment of all actors involved, benefiting from this process that promotes the reduction of impacts, through the improvement of productive practices, in the forestry, aquaculture and marine areas.

II. BACKGROUND OF THE CONSULTANCY

Context:

Environmental conservation is moving towards new, more participatory approaches that integrate the vision of local communities and indigenous peoples, recognizing their needs and ways of life. This change aligns with Target 3 of the Convention on Biological Diversity's Global Biodiversity Framework, which seeks to conserve 30% of ecosystems relevant to biodiversity conservation by 2030. This goal recognizes, in addition to official protected areas, the role of so-called "OECMs" (other effective area-based conservation measures), which are areas managed for other purposes, but where the result of their management results in a positive impact on biodiversity conservation.

Chile has a national legal framework recognizing the rights of Indigenous Peoples and artisanal fishers to coastal areas and marine resources, as well as community-led management mechanisms. This framework includes designated managed areas, such as Indigenous-managed areas, which have the potential to be recognized as Other Effective Area-Based Conservation Measures (OECMs). WWF is currently working on an initiative on supporting area-based conservation, led by indigenous peoples and local communities, in particular, with Coastal Marine Spaces of Indigenous Peoples (**ECMPO**) and Management and Exploitation Areas of Benthic Resources (**AMERB**). These areas, although not created for conservation purposes, have also shown a significant contribution to this objective, being managed by indigenous communities and artisanal fishermen's organizations.

One of the most significant challenges faced by communities and community organizations and entities, is the lack of availability and/or access to financial resources for the establishment and on-going community-based management for the sustainability of marine resources. Through this initiative, we aim to understand the current funding landscape and, if appropriate, implement a financing scheme that supports communities to prepare for and then manage their marine

resources sustainably in the long term. In addition, we are also exploring the financing landscape for community-based enterprises that operate in and/or benefit from the sustainable, long-term management of the marine environment. Supporting and rewarding activities that are compatible with sustainable management and a healthy ocean will not only contribute to long-term livelihoods but also help create alignment between all actors relevant to the locally managed areas. This is the subject of a separate but related consultancy, but the intention is to look at both areas together when considering the options for designing and structuring any funding or financing vehicle in the next phase.

Last year, WWF-Chile conducted an initial round of consultancy, which identified an initial list of eight financial mechanisms and programs that could be considered relevant to the project's scope and suggested a roadmap for next steps. This term of reference focuses on understanding the current funding landscape for communities and closing the gap on understanding and costing the activities related to the establishment and management of AMERBs and ECMPOs that are in line with the general initiative in Northern Patagonia.

III. DESCRIPTION OF THE CONSULTANCY

Goal:

- Describe and cost the activities related to the establishment and management of AMERB and ECMPO that are in line with the general initiative in Northern Patagonia,
- Identify existing funding sources that are covering or can potentially cover these costs
- Identify gaps and potential funding sources that could be matched to them
- Propose recommendations for action that support streamlining, aggregating or creating new structures that would increase the efficiency and viability of the long-term management of the proposed areas

Geographical Scope of Consultancy:

This analysis will be conducted with a focus on the selected project sites described in the "**Geographical Scope of Consultancy**" section to ensure an in-depth assessment and actionable recommendations based on the views of local communities and indigenous peoples. There is also existing baseline information, particularly the socio-economic baseline of the project, which should be used as reference for this consultancy. These will be made available to the consultants within the first week of work.

This consultancy will focus on six sites/areas of work that have been identified by WWF Chile, through a rigorous selection process, as follows:

1. **Caleta Huellehue, coast of Osorno, Los Lagos Region:** an AMERB focused on the extraction of loco (*Concholepas concholepas*) and lapa (*Fissurella* sp.). The main challenges are related to the illegal extraction of the AMERB, the need to strengthen the enforcement of the area and the need to promote the diversification of economic activities. The presence of other neighboring figures, such as the ECMPO Cóndor and the Multiple Use Marine Protected Area Lafken Mapu-Lahual, also highlights the importance of considering the synergies that may arise, for example, in the settlement of marine

refugees. In addition, an innovative financial instrument for conservation is being developed as a pilot project under the GEF “Economic Instruments¹” project, led by the Ministry of Environment, in collaboration with the fishermen's union. WWF has been working here since 2024 in collaboration with the Huelletlhue artisanal fishermen's union.

2. **Chepu, Ancud, Chiloé Island:** a site where four AMERBs are managed by the Mar Adentro fishermen's union, where the extraction of loco (*Concholepas concholepas*) and sea urchin (*Loxechinus albus*) provides a strong economic base. This site, like Caleta Huelletlhue, is included in the geographical scope of the GEF Economic Instruments project and has been supported by WWF since 2024. The main challenge is to scale up their current business, connecting them with new markets and/or adding value to the product they are selling, so their revenues are increased while securing a long-term sustainable use of the marine resources.
3. **Guapilacuy, Ancud, Chiloé Island:** a site where four AMERB are managed by the “Gente de Mar de Chaular” fishermen’s union, focused on the extraction and feedlot of the Patagonian red octopus (*Enteroctopus megalocyathus*). WWF has been supporting this community since 2024.
4. **AMERBs in Raúl Marín Balmaceda, Aysén Region:** a site where WWF is working with two AMERBs (Brazos del Pillán and Marín Balmaceda Sector D) and coexists with the Pitipalena-Añihué Multiple-Use Marine Protected Area. The AMERBs are managed by the Puerto Raúl Marín Balmaceda fishermen's union, where the main challenge is the illegal extraction of marine resources by foreign fishermen.
5. **“Cóndor” ECMPO:** an oceanic ECMPO declared in 2016, this figure coexists with the AMCP-MU Lafken Mapu Lahual, the Multiple Use Marine Protected Area Lafken Mapu-Lahual and two AMERBs.
6. **Trade association “Chilotas, contra corriente A.G.”:** organization which brings together artisanal fisherwomen from the Chiloé Archipelago to defend their rights, promote equity and strengthen their participation in decision-making. It also works for the sustainability of marine resources and the visibility of the needs of women in the sector, promoting a responsible local economy.

The selection of these sites is based on WWF's prior experience, the diversity of contexts and challenges, the opportunity to create synergies with other initiatives, and the focus on key stakeholders such as artisanal fishing organizations and women in the sector. The sites represent different marine management frameworks (AMERBs, ECMPOs) and focus on extracting various marine resources (abalone, limpets, sea urchins, octopus). Each site highlights specific challenges faced by communities in resource management. The inclusion of the A.G. “Chilotas, contra corriente A.G.” enables an understanding of women's dynamics and needs in the sector— a critical aspect for the consultancy’s inclusive approach.

Deliverables

¹ GEF project on Economic Instruments (ID 10213), more info: <https://www.thegef.org/projects-operations/projects/10213>

Deliverables	Activities
<p>1. Inception Report An inception report outlining the objectives, scope, methodology, work schedule, milestones, stakeholders to be interviewed (community leaders, government bodies, local conservation community-based enterprises, conservation groups), organized in an excel database, and a structured interview guide designed for collecting qualitative insights; and roles and responsibilities of team members for the consultancy.</p>	<ul style="list-style-type: none"> - Kick-off meeting with the WWF team to settle relevant matters to be considered in the work plan. - Round of meetings with other key WWF team members involved in the initiative. - Develop workplan and timeline, including consideration for any field visits and WWF staff availability - Develop an excel sheet to list key stakeholders and track actions with each of them. Include in the same excel sheet the interview guide.
<p>2. Identification of Activities for Sustainable Management in AMERB and ECMPO 3. Excel sheet of identified activities</p>	<ul style="list-style-type: none"> - Plan interviews with key stakeholders identified in product 1 (first round of field trips). - Seek secondary information to complement the information gathered from the interviews. - List the key activities and inputs needed for the establishment and management of AMERB and ECMPO in an Excel sheet.
<p>4. Costed Activities Database for Sustainable Management A detailed list of estimated costs for each identified activity needed to support AMERB and ECMPO sustainable management in an Excel sheet.</p>	<ul style="list-style-type: none"> - Develop a costing exercise of the activities related to the establishment and management of AMERB and ECMPO identified in the above deliverable. - Generate a database of costs associated with each identified activity, in USD and Chilean pesos. - Review relevant information gathered both from secondary information and key stakeholders' interview.
<p>5. Analyze existing funding sources, and identify gaps for community-based management of marine resources 6. 5 to 10 page analysis on sources, uses and gaps</p>	<ul style="list-style-type: none"> - Review and analyze existing funding sources that currently cover or could potentially cover the costs identified already (costed activity framework for AMERB and ECMPO establishment and management). - Compare the total current or potential funding available through existing sources against the cost estimates from above deliverable to identify specific financing gaps, clearly outlining which activities or categories (e.g., staffing, infrastructure, monitoring) remain uncovered. - Identify areas at risk of underperformance or non-implementation if financing gaps are not addressed, to inform prioritization and development of appropriate financing pathways.
<p>7. Findings and co-creation workshop 8. A draft report and the organization and delivery of a half or full day in person workshop prior to finalizing the final report</p>	<ul style="list-style-type: none"> - Based on the financing gaps identified in above deliverable, make initial recommendations, that can be discussed through a dedicated workshop with WWF staff from Chile and US, prior to the final report being delivered on whether a new or adapted financial mechanism is needed to fully support the establishment and management of AMERB and ECMPO, especially for activities not covered by existing mechanisms. The options to be considered must include potential partners in both Chile and overseas.
<p>7. Final Report Delivery of final report together with relevant excel sheets and other</p>	<ul style="list-style-type: none"> - Building on prior analysis and stakeholder input, identify 1–2 promising financing options that could support community-aligned conservation and livelihoods in Chile.

Deliverables	Activities
ancillary information, including agreed upon recommendations and next steps to advance the program	<ul style="list-style-type: none"> - For each option, outline a brief implementation pathway, including potential partners, basic governance and operational considerations, and opportunities to link with existing initiatives or policies.

Other general activities important to consider during the execution of the consultancy:

- Kick-off meeting with the WWF team to settle relevant matters to be considered in the work plan.
- Review of the design of the initiative and information that has already been collected by other components, including prior work on scoping, made available to the consultants by WWF Chile.
- Participate in series of short workshops or meetings with the WWF teams working on the initiative to provide critical local context, political situation and status of the local engagement with WWF. The consultants will be asked to consider the information provided in this workshop along with the consultancy.
- Weekly/biweekly meetings with WWF's counterparts to check progress (only required for the lead consultant)
- Facilitation of meetings and workshops that are agreed in the work plan to achieve the objectives of the consultancy.
- Coordinate with WWF team and consider at least one field trip to the sites mentioned in the Geographical Scope of Consultancy and others if required, including consideration for availability of WWF staff.
- Coordinate meetings and interviews with key actors inside and outside the organization, always in prior agreement and coordination with WWF counterparts.
- Generation of reports requested as products, which must include feedback from WWF's counterpart in their final version.

IV.- SCOPE OF CONSULTANCY

The work of this consultancy considers cabinet work and participation in virtual and/or face-to-face instances of coordination and implementation of the project. Likewise, coordination, monitoring and validation of products must be held with other actors involved in the development of the consultancy, which will be agreed upon in the development of the work plan.

The consultant must report his work to the project manager of the WWF Chile contract, in this case, to Cristina Torres (cristina.torres@wwf.cl).

V.- DEADLINES

The call for proposals will take place until 8th of August this is the deadline by which all applications will need to be submitted.

The consultancy will last approximately six months. Consultancy period: September 1, 2025 to February 28, 2026.

VI. – PROFILE OF THE CONSULTANT

- Consulting team with proven experience in conservation finance, protected or sustainably managed area financing mechanisms and working with local communities, with a preference for developing advice on locally led conservation financing at the local level in Latin America, ideally Chile, ideally in the marine-coastal environment.
- In case of independent consultants, please consider full-time availability to secure the accomplishment of the activities, including field trips.
- The consulting team must have the capacity to facilitate agreements and develop high-quality products.
- Excellent writing and presentation skills both in Spanish and English (mandatory).
- Strong organizational, managerial, and communication skills.
- Good understanding of the context of marine conservation and protected and conserved areas in Chile.

VII.-TECHNICAL PROPOSAL

The consulting team must submit a technical proposal that includes at least:

- General methodologies and relevant milestones to consider in the development of the consultancy.
- CV of the lead consultant and team.
- Detail of the costs, fees or expenses that the consultant considers relevant to incur for the fulfillment of the objectives, including field trip and other travel.

VIII.- BUDGET

The total budget to be considered for consultant's fees is **USD 20000-30000**, including bank transaction costs.

Prior to signing the contract, the consultant will be asked for a detailed cost structure, including fee estimates, materials for workshops and travel, or other things that are necessary to comply with the Terms of Reference.