

**Market Analysis of Conservation Community Enterprises and Their Linkages to Community-Led
Natural Resource Management**



July 2025

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:

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 at both the grassroots organization and community-based conservation enterprise levels is the lack of availability and/or access to financial resources for the establishment and community-based management of marine resources. WWF Chile is advancing initiatives that strengthen community-led conservation through sustainable economic activities. Community-based enterprises (CBEs) rooted in natural resource management present promising models to combine livelihoods, resilience, and biodiversity outcomes. However, the community-based enterprises are not always necessarily operating in a way that is compatible with sustainable management objectives, nor contributing to the management costs, despite the benefits that they gain from them. In other cases, they lack the working capital or access to funding to develop business models that advance sustainable management objectives or diversify away from those that are incompatible.

To advance the project, there is a need to understand more about these enterprises, what their financial barriers or constraints are and whether access to capital provides an incentive to transform business models, scale up those that are already sustainable, or create new enterprises that benefit communities and biodiversity. This consultancy will support WWF Chile's broader work on community-led conservation

by providing a robust market analysis of the economic landscape in which conservation CBEs operate and by identifying pathways to strengthen their integration with community-led marine and coastal resource management. The analysis collected in this study will provide a critical input to a broader understanding of what financial mechanisms might be required to equip both community management entities, communities and enterprises to support the advancement of sustainable management areas that have access to long-term funding sources for continued success.

III. DESCRIPTION OF THE CONSULTANCY

Objective: To conduct a structured and participatory assessment of the market and finance landscape for conservation-oriented enterprises in Northern Patagonia, and identify concrete linkages between these enterprises and community-led natural resource management structures/mechanisms such as AMERB and ECMPO. These linkages may include financial flows, service or resource dependencies, co-management arrangements, or shared ecological outcomes that align enterprise activities with local conservation priorities.

SCOPE OF WORK

Geographical Focus: 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 Huelleshue, 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 ActorMERB, 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 Huelleshue 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 Huelleshue, 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

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

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.”, 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.

Phases and Activities:

I. Inception & Scoping:

- Develop timeline and workplan and hold kick-off meeting with WWF Chile and WWF US to align expectations and finalize the work plan, including proposed dates for field visits to accommodate WWF staff
- Develop methodology, stakeholder map, and interview guides, including an assessment tool for the current contribution/impact on biodiversity of the CBEs
- Deliver an Inception Report (max. 4 pages) outlining objectives, scope, timeline, workplan, methodology, milestones, and team roles

II. Desk Review & Stakeholder Mapping:

- Review of relevant literature, value chain analyses, and governance documents
- Mapping of CBEs and associated natural resource management mechanisms in the key sites and documenting the potential linkages between the two (The linkages may include financial flows, service or resource dependencies, co-management arrangements, or shared ecological outcomes that align enterprise activities with local conservation priorities.)

- Review of the financial landscape for SMEs in the region, including an analysis of existing microfinance and other financial service providers, their market reach, and the key financial constraints faced by conservation-oriented enterprises.

III. Fieldwork & Primary Data Collection:

- Semi-structured interviews and focus groups with CBEs, Indigenous organizations, local authorities, and NRM actors -
- CONADI
- Comité de Desarrollo y Fomento Indígena
- Programa Chile Indígena
- Fondo de Desarrollo Indígena (FDI)
- Fondo de Cultura y Educación
- CRECIENDO
- Subsidio para la adquisición de tierras
- Subsecretaría de Pesca y Acuicultura (SUBPESCA):
- Servicio Nacional de Pesca y Acuicultura (SERNAPESCA):
- Instituto Nacional de Desarrollo Sustentable de la Pesca Artesanal y la Acuicultura de Pequeña Escala (INDESPA):
- CONADI (Corporación Nacional de Desarrollo Indígena):
- Fondo de Administración Pesquero (FAP):
- Gobiernos Regionales (GORE), mediante los FNDR o fondos específicos, pueden cofinanciar proyectos vinculados al fortalecimiento de AMERB, especialmente en infraestructura o asistencia técnica.

to validate and build on to the findings from the desk review/stakeholder mapping

- First round of field visits to at least three priority sites
- Collection of qualitative and quantitative data on CBE landscape including typical business activities; size of businesses; financial needs and constraints; existing and potential market linkages and constraints (such as physical connection; cold chain; lack of market knowledge; lack of quality product etc.),
- Interviews with relevant banks and other relevant financial institutions that serve the conservation-oriented enterprises

IV. Analysis & Synthesis:

- Analyze the market landscape in which the conservation-oriented enterprises operate in the defined geographical scope of this consultancy (see “Geographical scope of the consultancy”, below), including:
 - Key industries, value chains, existing market dynamics including buyer and supplier linkages- both locally and internationally,
 - Primary stakeholders and their interrelationships,
 - Major challenges that conservation community-based enterprises face in operating and scaling, disaggregated (to the extent possible) by gender, Indigenous Peoples status, and conservation focus.
 - Existing Linkages between conservation-oriented enterprises and community-based management of natural resources

- Analysis and synthesis of potential to strengthen business market access and access to finance – opportunities and constraints
- Develop a simple theory of change, based on the market landscape analysis, that can link natural resource management and associated improved biodiversity outcomes with incentives that boost access to capital for conservation-oriented enterprises.
- Set up and facilitate a discussion on the findings with WWF Chile and WWF US prior to finalizing the recommendations

I. Reporting & Strategic Recommendations:

- Draft and finalize a Market Landscape Report including all areas identified above
- Propose practical recommendations for next steps, including the potential for WWF Chile to support the design and implementation of potential market linkage, including incentive schemes that align with the project outcomes and theory of change

Deliverables

Deliverables	Activities
1. Inception Report An inception report outlining the objectives, scope, methodology, work schedule, milestones, stakeholders to be interviewed	<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 an excel sheet to list key stakeholders and track actions with each of them. Include in the same excel sheet the interview guide.
2. Desktop review and stakeholder mapping A short report outlining the key findings from the desktop review and stakeholder mapping	<ul style="list-style-type: none"> - Review of the relevant literature and mapping of stakeholders - Through literature review and desktop research, document the market landscape for conservation-oriented enterprises, identify challenges they face in scaling up and accessing capital and identify potential linkages between enterprise activity and community-based management of natural resources - Build hypothesis for how sustainable enterprises can be leveraged to support better conservation outcomes within in the community-based structures for natural resource management through appropriate incentives
3. Field Visit Findings A short report outlining key findings from the field visits	<ul style="list-style-type: none"> - Plan interviews with key stakeholders (first round of field trips) - Undertake field visits including relevant members of WWF - Validate the key findings and hypotheses from the desktop research - Write up and present findings to WWF team for discussion - Finalize field visit findings for final report - Analyse the findings from the desk research and field visit and synthesise the findings - Present and discuss findings with WWF team

Deliverables	Activities
	<ul style="list-style-type: none"> - Write up analysis and synthesis for final report
4. Market and Finance Landscape Analysis	<ul style="list-style-type: none"> - A final report that summarizes market landscape and proposed next steps for WWF-Chile to design and implement appropriate incentives for conservation-oriented enterprises that support community-based management of natural resources

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

- Kick-off meeting with the WWF team to identify relevant matters to be considered in the work plan.
- Review of relevant inputs of the initiative granted by WWF.
- Participate in series of 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 alongside the consultancy.
- Weekly/biweekly meetings with WWF's counterpart to check progress
- Facilitation of meetings and workshops that are agreed in the work plan to achieve the objectives of the consultancy.
- Review of the design of the initiative and information that has already been collected by other components.
- Coordinate with WWF team and consider at least one field trip to the sites mentioned in the Geographical Scope of Consultancy.
- 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 desk-based research, field visits, participation in virtual and/or face-to-face meetings with WWF on coordination and implementation of the project. The consultant must report his work to the technical director of the WWF Chile contract, in this case, to the project manager, Cristina Torres.

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

- The consulting team must demonstrate:
 - Proven experience in market analysis and value chain assessments in Chile or Latin America - Understanding of marine and coastal community-led resource management (preferably with AMERB/ECMPO experience)
 - Experience working with Indigenous Peoples, women-led organizations, and community-based enterprises
 - Good understanding of the context of marine conservation and protected and conserved areas in Chile.
 - Capacity for high-quality stakeholder engagement, fieldwork, and data synthesis
 - Proven experience in analyzing and proposing financial solutions that link conservation outcomes to economic benefits and outcomes
 - Excellent writing and presentation skills both in Spanish and English
 - Strong organizational, managerial, and communication skills.
 - Fluency in Spanish and working proficiency in English

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/s and team.
- A detailed budget against deliverables, including proposed costs for travel or other relevant expenses to fulfil the objectives of the proposal

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.