Monitoring progress on Sustainable Financing for Protected Area System - Financial Sustainability Scorecard -

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OVERVIEW

1. Financial scorecard: purpose
2. Financial score card: structure
3. Applying the financial scorecard
4. Country experience
5. Looking into the future
Purpose of the Financial scorecard

- supplies PA professionals with upstream factual data to prove problems to decision-makers (e.g. outdated legislation), and identify areas that need government and donor support;
- To holistically review, assess and track the evolution and improvements in country’s PA financial situation
- brings partners together to share knowledge about the PA system – a good learning experience;
- implements CBD PoWPA, especially Goal 3.4 Financial Sustainability;
- To track progress of GEF and other large-scale projects dealing with PA financing
Structure of the Financial Scorecard:
Part I. Quantitative - Overall Financial Situation

Introduction: PA types, numbers and coverage: the “boundaries”

All available funds (items 1-6): government budget + donors + own PA revenue.

Annual expenditures (item 7): actual disbursements for operational and investment costs.

Financing needs (item 8): basic and optimal scenarios.

Financing gaps (item 9 = Item 8 – Item 6): For the two scenarios.
Part II. Qualitative Scores

Component I: Legal, regulatory and institutional frameworks
- revenue generation and sharing, Trust Funds;
- alternative institutional arrangements for PA management;
- institutional mandates, staffing profiles and incentives.

Component II: Business planning and tools for cost-effective management
- site-level business plans;
- efficiency and transparency of auditing and reporting;

Component III: Tools for revenue generation
- user fees; fee collection systems; PES & concessions.
- engagement of PAs in marketing and communications;
Part III. Scoring and Measuring Progress

- summary of the scores obtained;
- allows comparisons between years and countries;
- what was the percentage last year – doing better or worse?
Applying the financial scorecard

- **When?** Designing the financial strategy for the PAS; preparing the annual budget; developing projects addressing protected area financial sustainability; setting-up the PA monitoring system;

- **Level:** National, but also possible regional/provincial, or marine/terrestrial scorecards;

- **Why national/system level?** – activities required at the system level: policy reform; setting PA fees; coordination effort and support from various ministries/agencies; cost-effectiveness;

- **Who:** The highest agency responsible for PAs in collaboration with Ministry of Finance, regional authorities, other ministries;

- **How often:** annually, but also when preparing projects;
Country experience:

• In Chile, Uruguay, Paraguay, Costa Rica, Panama, and Nicaragua results helped spot PA system weaknesses, pointing to need for better laws, and higher support for planning PAs;

• In Ukraine scorecard helped identify problems with financing regional PAs, and pointed to need for better data collection cooperation across government levels;

• In Macedonia scorecard pointed to low to non-existent revenue from PES, ecotourism, and similar mechanisms, triggering a GEF project;
Looking into the future:

- UNDP is promoting the application of the Scorecard globally in partnerships with GEF, TNC, WCPA;

- Mandatory for all GEF-funded projects addressing financial sustainability of PAs (SP1 of SO1);

- UNDP - TNC collaboration in LAC and Europe – 2008;


- UNDP/GEF - PoWPA Country Action Project has started to apply it
http://www.undp.org/gef/05/kmanagement/newpublication.html