



Sustainable Ocean for All

DEVELOPMENT CO-OPERATION FOR A SUSTAINABLE OCEAN ECONOMY 2021

Snapshot

June 2021

How much official development assistance do developing countries receive to foster sustainable ocean economies? Which countries give the most support, to whom and to which areas? How much goes to curbing ocean plastic pollution? Find out more in this snapshot based on the most recent data (2019).

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Why is a sustainable ocean economy important and how can development co-operation help?

Developing countries are particularly exposed to the consequences of ocean marine and coastal ecosystem degradation, as many of them heavily depend on ocean-based industries, such as fisheries and tourism.

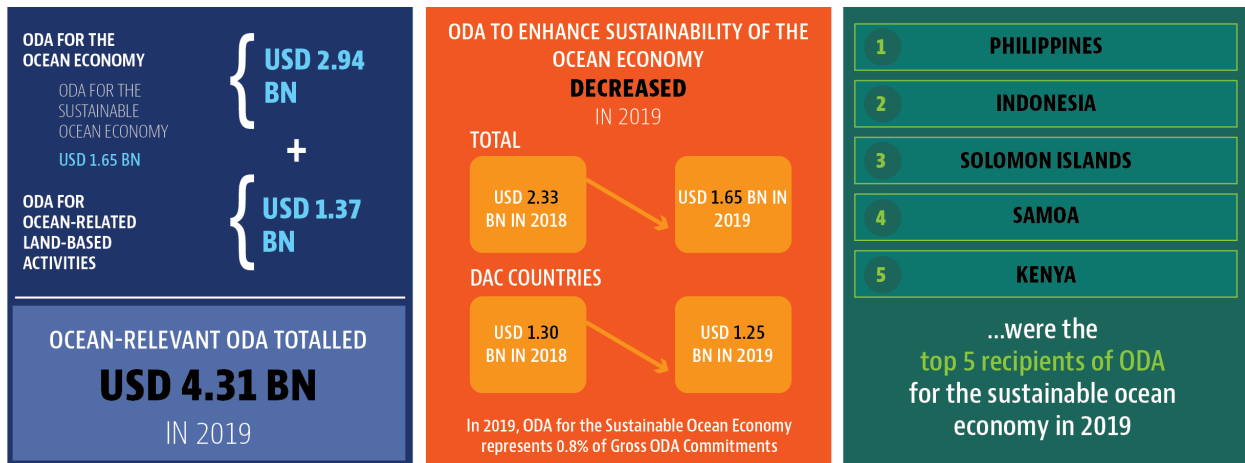
A sustainable ocean economy can offer better quality jobs, cleaner energy, improved food security and enhanced resilience: the backbone of long-term, inclusive and sustainable development. At the same time, it contributes to the protection of the world's ocean.

Development co-operation can help developing countries enhance the sustainability of their ocean-based sectors and seize new sustainable opportunities from emerging ocean economy sectors by facilitating access to the science, evidence, innovation and financial resources needed to turn these opportunities into reality. However, despite increasing attention from the international development community on this issue, Official Development Assistance (ODA) in support of a sustainable ocean economy remains to be a fraction of global ODA and further efforts are needed.

In 2019, the OECD created the *Sustainable Ocean for All* initiative to support the transition towards a truly sustainable global ocean economy, in a way that benefits the poorest and more vulnerable countries. Learn more about this Initiative [here](#).

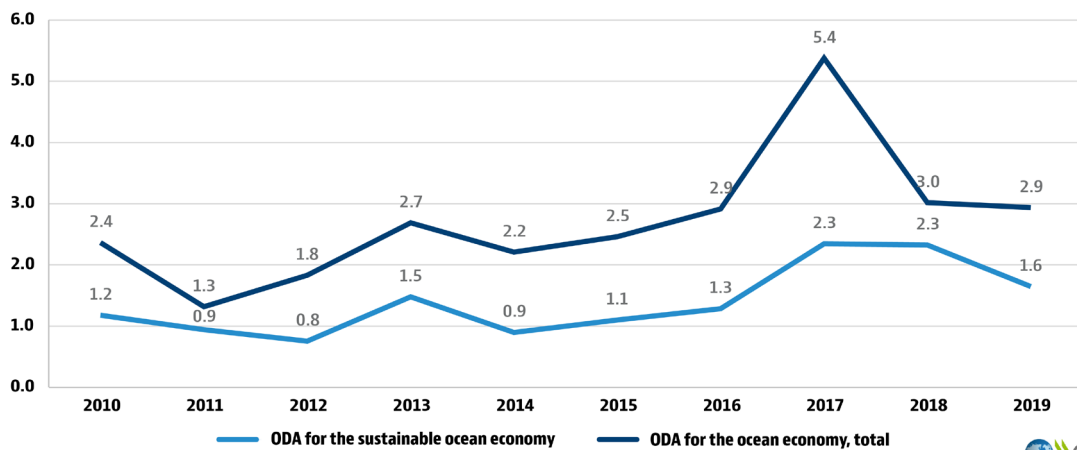
Recommendations for providers of development co-operation

- **Enhance the transparency and impact of ODA investments for a sustainable ocean economy**, by: (i) tracking official development assistance (ODA) for a sustainable ocean economy, (ii) identifying good practices and guidance, and (iii) developing new development co-operation schemes to help developing countries protect the ocean and harness new sustainable opportunities from emerging ocean-based industries.
- **Help mobilise and re-orient private finance towards a sustainable ocean economy**, by: (i) using ODA to improve the commercial viability of investments in sustainable activities and businesses, and to help create new sustainable products and markets through new investment vehicles and instruments; (ii) supporting the integration of ocean sustainability requirements into traditional financial services and investments, including all development finance institution lending (not all of which is concessional in ODA terms) and in exchange listing rules.
- **Foster international policy coherence to ensure that policies go beyond development cooperation to promote a fair and inclusive sustainable ocean economy**, by: (i) supporting independent studies on how policies –e.g. fisheries, tourism, investment and finance-- affect the sustainability of ocean economies in developing countries, (ii) promoting evidence-based dialogue at a national and international level on the impact of policies towards the sustainability of developing countries' ocean economies.



Total ODA to ocean economies **decreased** in 2019

IN CONSTANT 2018 USD BILLION

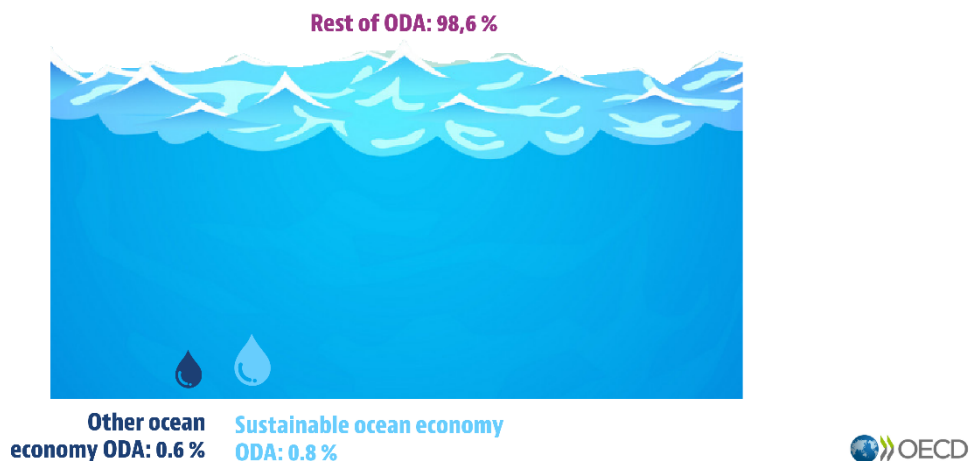


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Source: Authors based on OECD Creditor Reporting System. Full dataset available here: <https://oecd-main.shinyapps.io/ocean/>.

- In 2019, ODA for the *ocean economy* decreased from USD 3.0 billion in 2018 to USD 2.9 billion. Similarly, the share of this funding that contributed to enhancing the sustainability of ocean-based sectors and ocean conservation (i.e. ODA for the sustainable ocean economy) fell to USD 1.6 billion in 2019, down from USD 2.3 billion in 2018.
- The drop in *sustainable ocean economy* ODA was mainly due to a **fall in multilateral outflows**, which had previously reached a historical high in 2018 due to large projects in the maritime transport and fisheries sectors. This drop following the encouraging **increases in 2017-18** remains to be **unclear if this is a temporary fall or the start of a new trend**. This is the first time these flows have dropped a significant amount since 2014.
- Overall ODA for the *ocean economy* and for the *sustainable ocean economy* have slightly increased in the last decade, with the former spiking in 2017 due to large port investments in Southeast Asia.
- **In 2019, the share of ODA for the ocean economy that focused on increasing sustainability --targeting conservation and sustainable use of resources-- stood at 56%.**

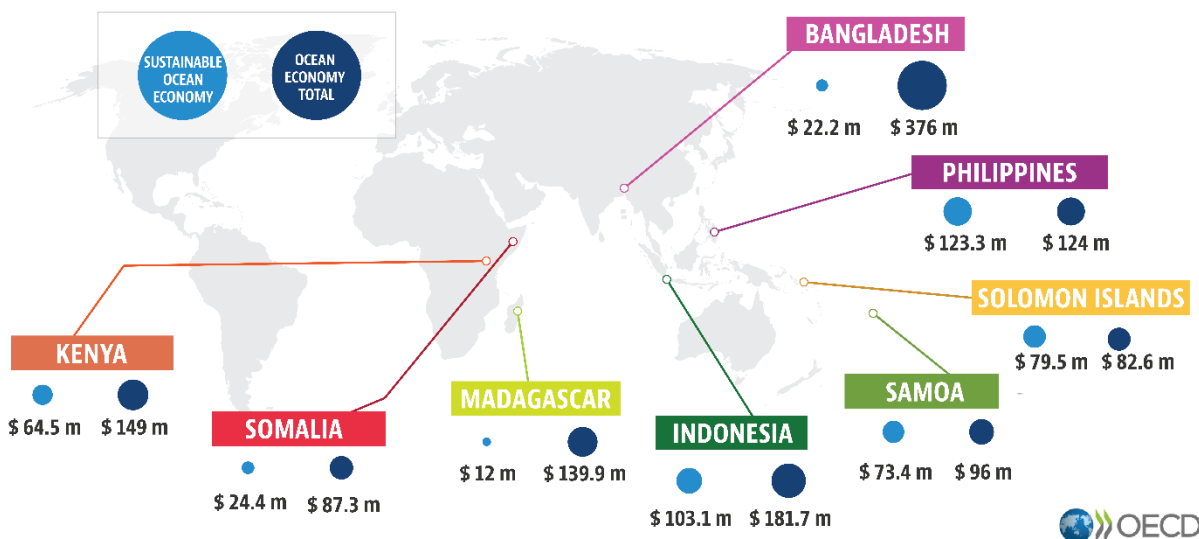
ODA for the sustainable ocean economy represents a fraction of global ODA



Source: Authors based on OECD Creditor Reporting System. Full dataset available here: <https://oecd-main.shinyapps.io/ocean/>.

- In 2019, approximately 0.8% of gross ODA commitments targeted the sustainable ocean economy and an additional 0.6% targeted other ocean-based industries without a dedicated focus on sustainability. If we consider ODA for the sustainable ocean economy as a proxy for SDG14, this figure is consistent with other estimates that highlight SDG14 as the least funded among the SDGs.

Africa receives the majority of ODA for the sustainable ocean economy



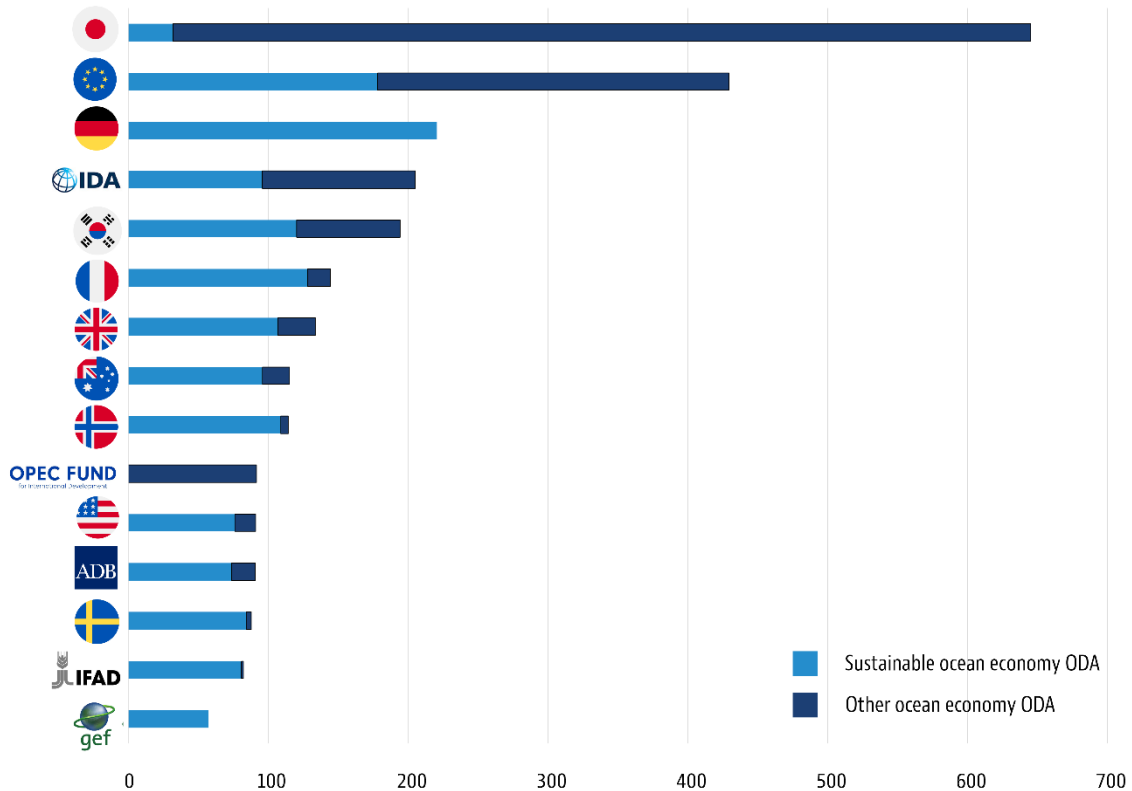
- Africa was the main recipient of ODA for the sustainable ocean economy in 2019, receiving 33% of region-allocable commitments. It was followed by Asia (30%) and Oceania (25%).
- The largest recipients of sustainable ocean economy ODA were: the Philippines (USD 123 million), Indonesia (USD 103 million), Solomon Islands (USD 80 million), Samoa (73 million) and Kenya (USD 65 million). Bangladesh, Madagascar and Somalia also received significant resources

in support of their ocean economy but smaller shares directly targeted sustainability. One fifth of ODA for the sustainable ocean economy targeted small island developing states (SIDS).



Japan, EU Institutions, Germany, IDA, and Korea gave the most aid for the ocean economy in 2019

OCEAN ECONOMY ODA, GROSS VOLUME, USD MILLION



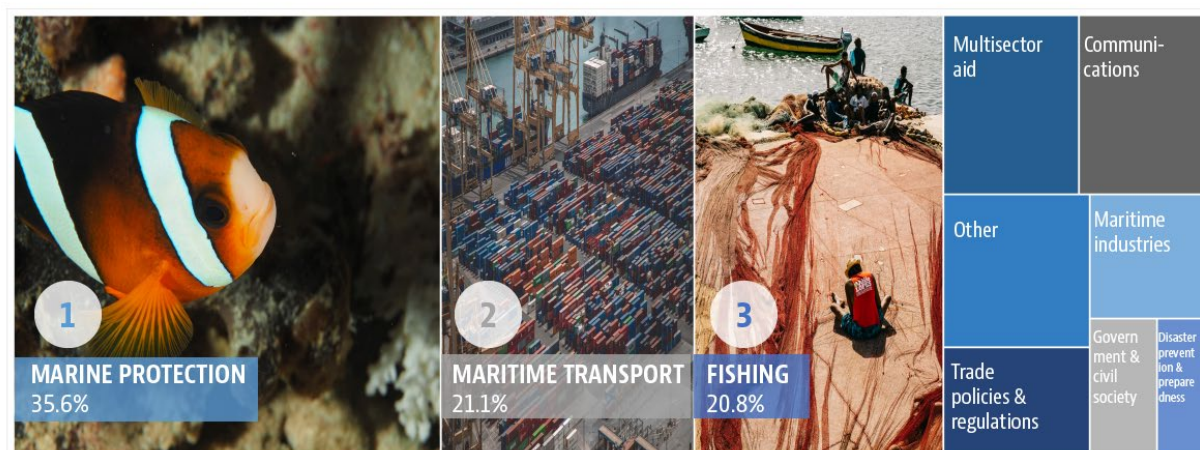
Source: OECD Creditor Reporting System



Source: Authors based on OECD Creditor Reporting System. Full dataset available here: <https://oecd-main.shinyapps.io/ocean/>

- In 2019, the largest providers of ODA for the ocean economy were Japan (USD 645 million), EU Institutions (USD 429 million), Germany (USD 221 million), the International Development Association (USD 205 million) and Korea (USD 194 million). When looking only at the ODA in support of the sustainable ocean economy, the top donors were Germany (USD 221 million), EU Institutions (USD 178 million), France (USD 128 million), Korea (USD 120 million), and Norway (USD 109 million).
- When looking at ODA for the sustainable ocean economy as a share of total ODA portfolios, the bilateral and multilateral donors prioritising the sustainable ocean economy the most in 2019 were Iceland (13.8% of allocable aid), the Food and Agriculture Organisation (10.6%), IFAD (8.3%), the Global Green Growth Institute (7.4%), New Zealand (5.5%), the Green Climate Fund (5.1%), Australia (4.5%), Sweden (3.8%), Norway (3.3%) and the Global Environment Facility (3.3%).

ODA for the sustainable ocean economy mainly focuses on three areas:



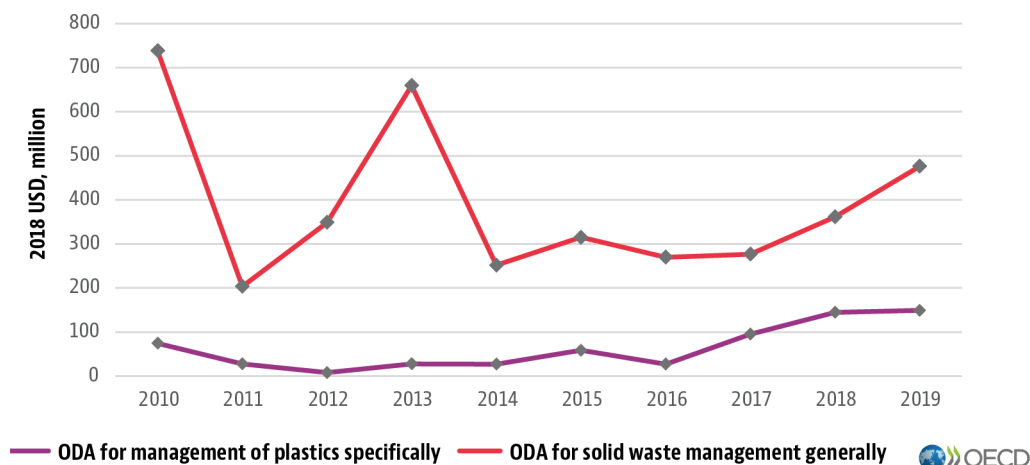
Source: OECD Creditor Reporting System



Source: Authors based on OECD Creditor Reporting System. Full dataset available here: <https://oecd-main.shinyapps.io/ocean/>.

- In 2019, ODA for the sustainable ocean economy mainly targeted three sectors: marine protection (35.6%), sustainable maritime transport (21.1%) and sustainable fisheries (20.8%).
- Grants made up 80% of funding across all sustainable ocean economy sectors. **In sectors that are more commercially exploitable, such as maritime transport, the share of grants is lower** (57% of total funds committed) than in areas such as sustainable fisheries and marine conservation (80% and 82% of funds respectively).
- **ODA for marine protection was the only increasing sector in 2019, reaching a record high of USD 587 million.** This represents an 8% increase from 2018 and accounts for 9.7% of ODA for general environment protection. The bulk of ODA for marine protection targeted Asia (USD 142 million), followed by the Americas (USD 106 million), Africa (USD 89 million) and Oceania (USD 58 million).
- **Sustainable maritime transport received USD 348 million in 2019, down from USD 569 million in the previous year.** This funding supported measures ranging from the offsetting of negative environmental impacts from new port infrastructure, to the development of climate-resilient maritime infrastructure, and the adoption of low carbon technologies for shipping. An additional USD 763 million in ODA was allocated to the maritime transport sector without a direct focus on sustainability, making it the largest recipient sector of ocean economy ODA.
- **In 2019, sustainable marine fisheries received USD 342 million, a marked reduction from USD 623 million in the previous year.** This funding fostered the adoption of ecosystem-based fisheries management systems, the integration of climate change mitigation and adaptation measures, and other aspects related to sustainable fisheries. An additional USD 262 million ODA was spent on marine fisheries with no direct focus on sustainability.

ODA specifically targeting the management of plastics has increased by 10% in 2019 following an upwards trend since 2016



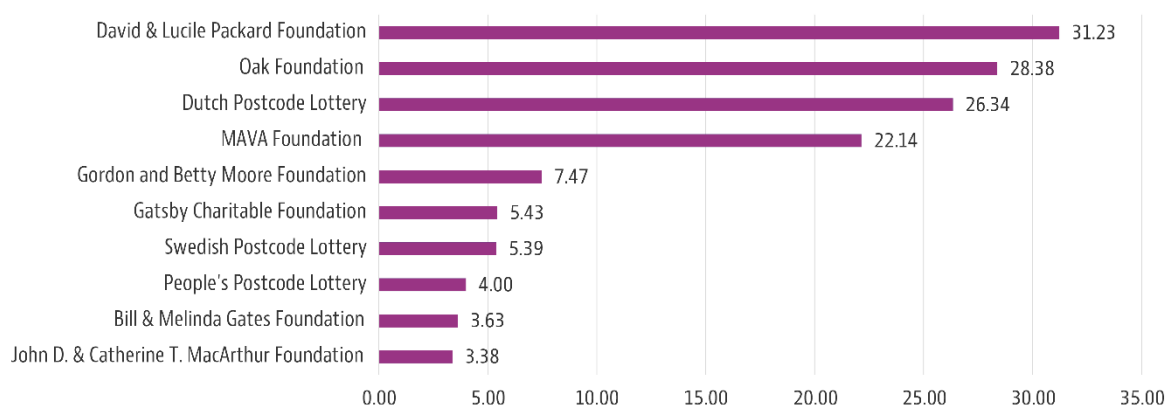
Source: Authors based on OECD Creditor Reporting System. Full dataset available here: <https://oecd-main.shinyapps.io/ocean/>.

- **Curbing land-based pollution** of the ocean is as important for the ocean's health as for increasing the sustainability of ocean-based activities themselves. **ODA to curbing land-based pollution of the ocean amounted to USD 1.37 billion in 2019, slightly below the annual average of USD 1.5 billion over 2010-2018.** The second measure captures ODA activity specifically targeting solid waste management in general and the management of plastics in particular, which has been receiving increasing attention.
- **ODA increasingly targets the reduction of plastic pollution**, with volumes growing by 57% between 2017 and 2019, from USD 95 million in 2017 to USD 149 million in 2019. Volumes targeting solid waste management more broadly have also increased, reaching USD 476 million (0.2% of total ODA) in 2019.
- **ODA towards solid waste and plastic management is heavily concentrated in a few territories.** The five largest recipients in 2019 were Turkey (40% of ODA for solid waste and plastic management), Serbia (8%), Tonga (4%), the West Bank and Gaza (3%) and the Plurinational State of Bolivia (2%). Bilateral institutions provided the bulk of ODA towards solid waste and plastic management (94% in 2019).



Philanthropic providers make significant contributions to **SDG14: life below water**

USD MILLION IN 2019



Source: oe.cd/foundations

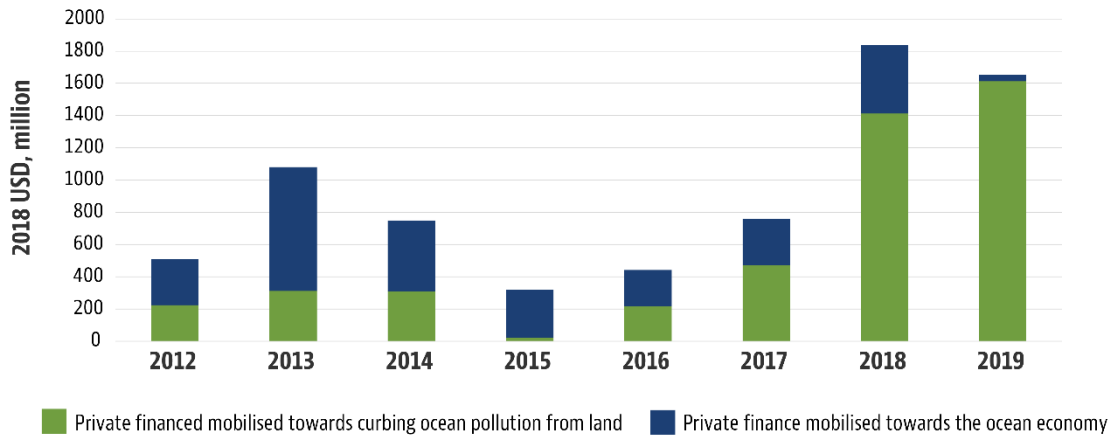


Source: <https://oe.cd/foundations>

- Philanthropic providers are demonstrating an increasing interest in ocean issues, recently investing in large marine conservation projects and stepping up support for sustainable fisheries and to address marine litter.
- In 2019, philanthropic contributions to SDG14 declined **from USD 200 million in 2018 to USD 139 million**. Top recipients for SDG14 are Indonesia (USD 7.3 million), China (USD 6.4 million) and Kenya (USD 5.4). The largest providers of philanthropic aid for SDG14 in 2019 are the David and Lucille Packard Foundation (USD 31 million), the Oak Foundation (USD 28.4 million) and the Dutch Postcode Lottery (USD 26.3 million).



Official development assistance (ODA) is mobilising private finance for the ocean economy



Source: oe.cd/mobilisation



Source: <https://oe.cd/mobilisation>

- Providers of development co-operation are using ODA to mobilise private finance, including for the ocean economy.** Development co-operation providers improve the attractiveness and viability of commercial investments, de-risking investments or helping to structure returns through new and emerging blended finance arrangements. Development partners also often provide technical assistance during the project preparation phase, crucial for the overall success of the project.
- In 2019, the amounts of private finance mobilised by ODA towards ocean-related activities slightly declined compared to 2018, but remain well above the 2012-17 average.** In 2019, private finance mobilised by ODA towards ocean related activities amounted to USD 1.7 billion, down from 1.8 billion USD in the previous year. This includes both finance for the ocean economy and finance for land-based activities that affect the ocean. The 2018 spike and the 2019 value reflect large investments into land-based activities in China, mainly relating to waste management (1.3 billion USD, or 68% of total private finance mobilised in 2018) and in Angola in 2019 (0.9 billion USD, or 55% of total private finance mobilised in 2019).

Annex A. Methodology

What does the data cover?

As part of the *Sustainable Ocean for All* initiative, the OECD tracks official development assistance (ODA) that supports the sustainable ocean economy. This snapshot presents the key messages obtained through this exercise. A more detailed methodology, as well as the full data set, are available on the online data platform (see <https://oecd-main.shinyapps.io/ocean/>). Data in this snapshot covers gross 2019 ODA commitments unless otherwise specified. This snapshot also covers data on finance from private philanthropy for Sustainable Development Goal 14 and on amounts mobilised from the private sector by development finance interventions in support of the ocean economy.