

4 Development co-operation for sustainable ocean economies

This chapter, along with Chapter 5, examines how development co-operation can help create a global ocean economy that is sustainable and responds to the needs of developing countries and the world's most vulnerable. It provides the first official tracking of official development assistance (ODA) for sustainable ocean economies to highlight the scope, nature and trends of international support for sustainable ocean economies in developing countries. The chapter also maps the range of ODA projects in support of sustainable ocean economies to help foster a common understanding of the multiple dimensions of sustainability and how they vary across ocean-based sectors. The chapter concludes with suggestions to enhance the impact of development co-operation in support of sustainable ocean economies.

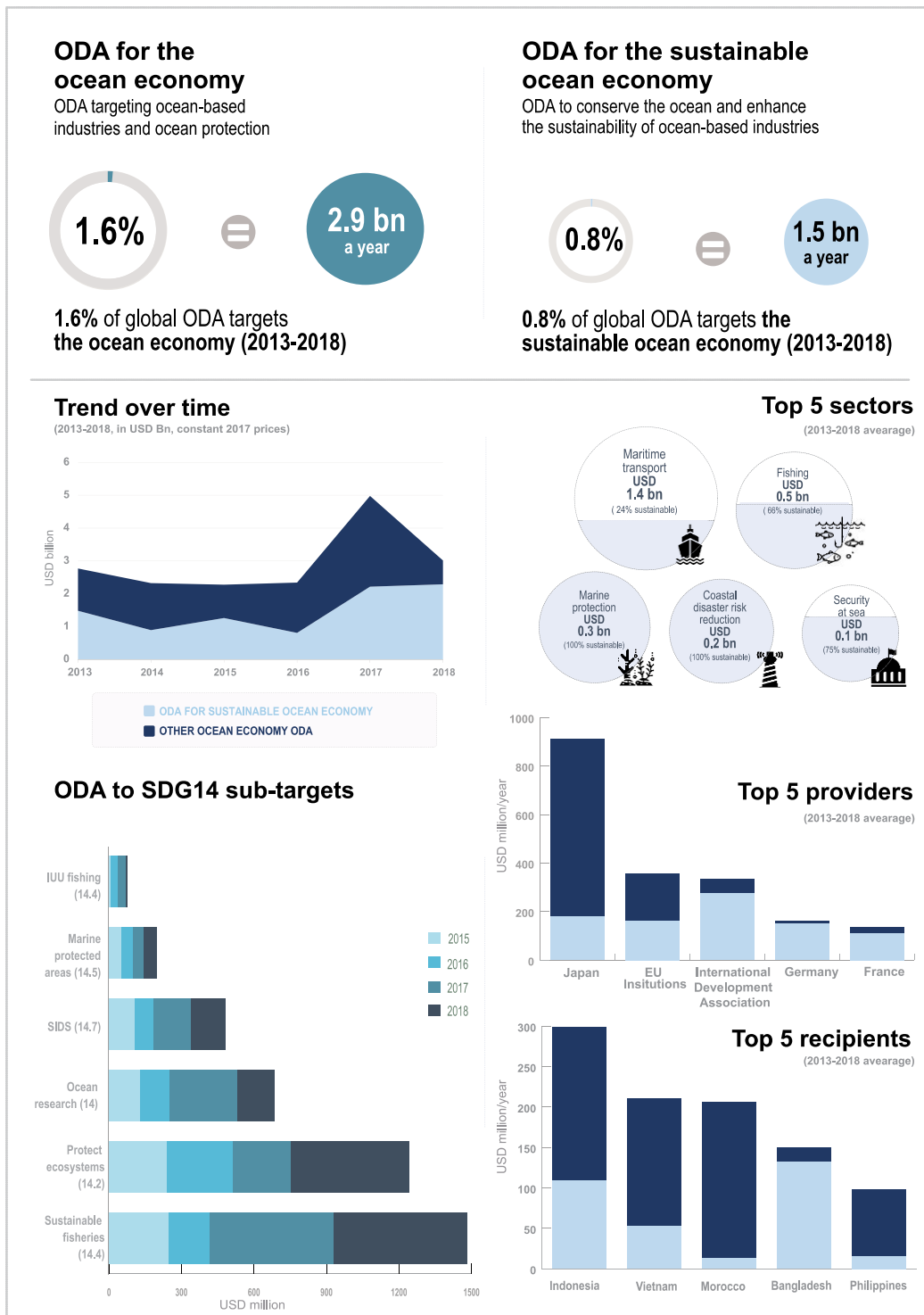
Development co-operation has a critical role in supporting developing countries to harness the benefits of sustainable ocean economies

Global urgency and ambition for conserving and sustainably using the ocean are rising. If managed sustainably, the ocean has the capacity to regenerate, be more productive and support more equitable societies. However, not all countries are in a position to undertake the bold, forceful actions required to harness the benefits of sustainable ocean economies. International co-operation and fair global arrangements have a key role to play in ensuring that the expansion of the global ocean economy is guided by institutional arrangements, policies and financial flows that are aligned with the imperative of sustainability and with the needs of developing countries and the world's poorest and most vulnerable people. Development co-operation has also significant role to play to facilitate developing countries' access to the science, evidence, innovations, and financial resources needed to transform both emerging and existing ocean-based sectors into catalysts for long-term, inclusive and sustainable development.

The impacts of the COVID-19 pandemic make the need for resolute ocean action from the development community all the more pressing. Entire ocean-based sectors such as tourism, sea transport and many others are being disrupted, with major economic consequences for developing countries. While it is too early to know the full impact of the pandemic, the needs of the post-crisis recovery will certainly vary across countries and recovery efforts will have to be country-led. Development co-operation will need to be in line with countries' national priorities and strategies for the emergency response and the recovery. It will need to concentrate not only on helping to address the health emergency, but also on 'building back bluer' fostering a recovery that puts ocean-based sectors solidly on a track of environmental and social sustainability. Official development assistance (ODA) and other resources – public, private, international and domestic – will likely come under increasing pressure. To maintain their focus on long-term sustainability, it will be essential to further identify priorities and approaches that can maximise the socio-economic and environmental benefits of ODA and other interventions.

This chapter presents original evidence on the volume, scope and nature of development co-operation for the ocean economy, highlighting the extent to which it incorporates sustainability and the approaches through which it is provided. The chapter provides the first quantification and analysis of ocean-related ODA, developed specifically for this report. The chapter also builds on the findings of the survey of members of the OECD Development Assistance Committee (DAC) conducted for to inform this report, the OECD Survey on DAC Members' Policies and Practices in Support of the Sustainable Ocean Economy (OECD Survey), and the Sustainable Ocean Economy Country Diagnostics conducted to inform this report. Figure 4.1 and Figure 4.2 illustrate key facts on ocean-relevant ODA, including its evolution over time and how it is distributed between regions, sectors and Sustainable Development Goal (SDG) 14 targets.

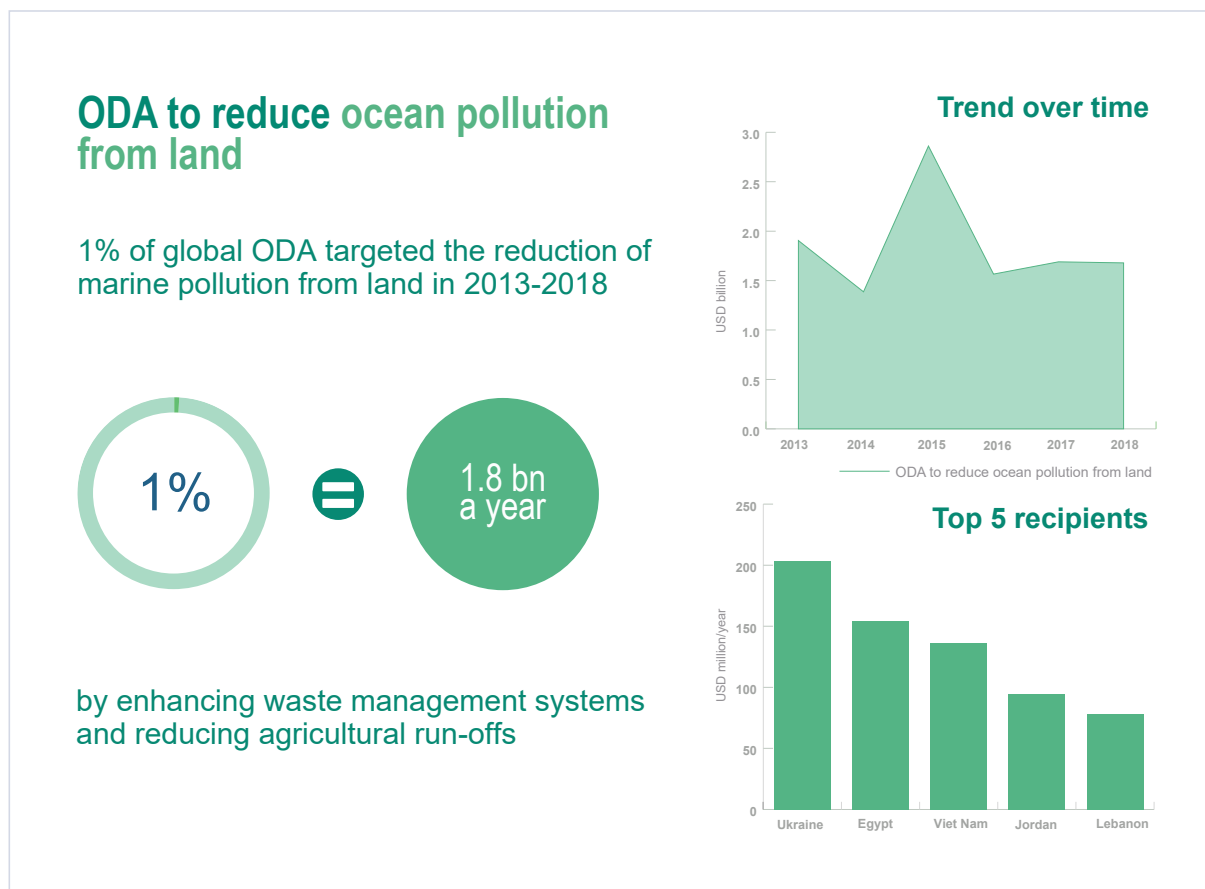
Figure 4.1. Key figures on ODA for the ocean economy and ODA for the sustainable ocean economy (2013-18)



Source: Authors' calculations based on OECD (2020^[1]), Creditor Reporting System (database), <https://stats.oecd.org/Index.aspx?DataSetCode=crs1>

StatLink <https://doi.org/10.1787/888934159430>

Figure 4.2. Key figures on ODA to reduce ocean pollution from land (2013-18)



Source: Authors' calculations based on OECD (2020^[1]), Creditor Reporting System (database), <https://stats.oecd.org/Index.aspx?DataSetCode=crs1>

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Growing international attention but no common understanding of the sustainable ocean economy to guide development co-operation

The international community's engagement on ocean is growing

Across the globe, an increasing number of initiatives are focusing on the ocean. The 2030 Agenda and the SDGs, especially SDG 14, as well as domestic pressure to address global ocean pollution and the new economic opportunities arising from the ocean economy are all driving this rise in a focus on ocean action (OECD Survey). Many new initiatives and much of the attention are centred on ocean plastics, an issue that has become more of a focal point for concern about the marine environment than the more radical changes to our behavioural, political and economic systems needed to achieve a healthy and productive ocean (Stafford and Jones, 2019^[2]).

To foster sustainable ocean economies, countries are developing new policies, forging new alliances and creating new funds. Japan recently leveraged its Presidency of the G20 to achieve the endorsement of the Osaka Blue Ocean Vision, which aims to reduce additional pollution from marine plastic litter to zero by 2050. Canada put oceans at the centre of its G7 presidency in 2018, launching the Charlevoix Blueprint

for Healthy Oceans, Seas and Resilient Coastal Communities and advancing the Oceans Plastics Charter. To date, 26 governments and 69 businesses and organisations have signed the Charter. Another initiative is the High Level Panel for a Sustainable Ocean Economy, created by leaders of 14 countries¹ from the global North and South and co-chaired by Norway and Palau as a collaborative effort to advance a sustainable ocean economy. In addition, the United Kingdom is establishing a GBR 500million (United Kingdom pound) Blue Planet Fund to help eligible countries protect their marine resources from key, human-generated threats including climate change and habitat loss.

Multilateral institutions that traditionally did not focus on the ocean are creating dedicated programmes and partnerships. In 2018, a group of donor countries established PROBLUE, a USD 150-million multi-donor trust fund that is hosted at the World Bank. Its four main priorities are to promote sustainable fisheries and aquaculture, curb marine pollution, enhance the sustainability of key sectors in the ocean economy, and support governments to build the necessary capacity to manage marine resources. In 2019, the Asian Development Bank (ADB) launched the Action Plan for Healthy Oceans and Sustainable Blue Economies for the Asia and Pacific region, a USD 5-billion plan targeting sustainable tourism and fisheries, the protection of marine and coastal ecosystems, reduction of land-based pollution, and enhancement of the sustainability of port and coastal infrastructure. In 2019, the French Development Agency, KfW and the European Investment Bank established the Clean Oceans Initiative to mobilise USD 2 billion over a five-year horizon to support countries, cities and businesses to manage and process their waste more efficiently and reduce ocean waste.

Philanthropies 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. The OECD estimates that in 2018, philanthropy provided USD 200 million for the ocean. The largest of these donors were the Oak Foundation (44% of the total), the David and Lucile Packard Foundation (15%), the Dutch Postcode Lottery (12%), and the MAVA Foundation (10%). From a geographical perspective, the most targeted regions are South of Sahara (51% of regionally allocable aid) and Far East Asia (19%).

No common definitions and dedicated cooperation tools for development cooperation in support of sustainable ocean economies. Despite the international community's growing interest in ocean matters, there remains a lack of common understandings, definitions and principles with which to align co-operation efforts and ensure that the development community is moving effectively towards the same targets. One of the reasons is that the sustainable ocean economy concept is fairly new. While several development co-operation providers have long track records of support for marine protection or specific ocean-based sectors such as fisheries, few have a more holistic understanding of the ocean economy and have started to consider ocean-relevant interventions through an integrated, cross-sectoral approach and a sustainability lens.

According to the OECD Survey responses, no DAC member has adopted an official definition of the sustainable ocean economy to guide its development co-operation efforts. Some DAC members employ working definitions of the sustainable ocean economy. All of these appear grounded in the idea that there is a need to reconcile economic opportunities with safeguarding the long-term health of the marine environment, although the understanding of what this means in practice varies widely. This is reflected in the sectors identified by survey respondents as being part of a sustainable ocean economy. For instance, four respondents list offshore oil and gas and seabed mining, as these industries represent a large share of the ocean economy gross domestic product, while seven only industries with more limited environmental impact and greater potential to become sustainable.

“Where there are explicit trade-offs between conservation (or climate action) objectives, and economic development objectives, often the conservation/climate objective can get lost. Getting the balance right across those objectives is a crucial feature of sustainable ocean economies and should be reinforced at every opportunity. The shared experience of OECD members and international institutions should explicitly assist countries in addressing these trade-offs” – A survey respondent

Most respondents identify climate change mitigation, adaptation and resilience as integral parts of the environmental sustainability aspect of sustainable ocean economies. Only three respondents instead explicitly mentioned social sustainability – i.e. improving livelihoods and well-being, creating decent jobs, and fostering socio-economic inclusion – in their working definitions. Thus, while many countries recognise the importance of ocean industries to promote the livelihoods of coastal populations, very few adopt a definition of sustainability that goes beyond the environmental dimension and takes into account social sustainability in line with the 2030 Agenda’s three dimensions of sustainability. Most respondents (11 of 13) see sustainable fisheries as the sustainable ocean economy sector with the largest potential in developing countries, although fewer also include sustainable tourism (6 of 13) or aquaculture (5 of 13). The importance of marine renewable energy is highlighted by 4 of 13 respondents, although this was the least targeted ocean sector in terms of ODA until 2017.

Most providers of development co-operation lack dedicated development co-operation strategies and implementation and monitoring tools for promoting sustainable ocean economies. Only four countries to date have either developed a standalone strategy on development co-operation in support of the ocean (Iceland and Norway) or are in the process of developing such a strategy (Ireland and France). All other bilateral donors tend to address issues related to the ocean through a thematic or sectoral approach. For instance, most donors have a specific strategy for fishery support and some also carry out targeted impact evaluations to assess the effectiveness of their funding in this sector. As a result, ocean issues are addressed in a fairly fragmented manner rather than as part of integrated ocean management.

Towards common definitions: tracking ODA trends for sustainable ocean economies

Effective development co-operation in support of sustainable ocean economies requires a common understanding, definitions and principles regarding what *sustainable* ODA interventions in the ocean economy space consist of. Such definitions and principles are needed to provide accountability and visibility for ODA spending and to monitor how much ODA is contributing to achieve sustainable ocean economies, global priorities and targets on the ocean, and SDG 14. Common definitions also can foster shared learning across providers and help identify good practices and scalable approaches that can increase the effectiveness of ODA interventions for the ocean economy. Further, evidence on global finance for the ocean - from private, public, domestic and international sources - is still scarce and scattered. Tracking ODA for the sustainable ocean economy contributes to filling this gap and to enhancing transparency on the range of global financial flows for the ocean.

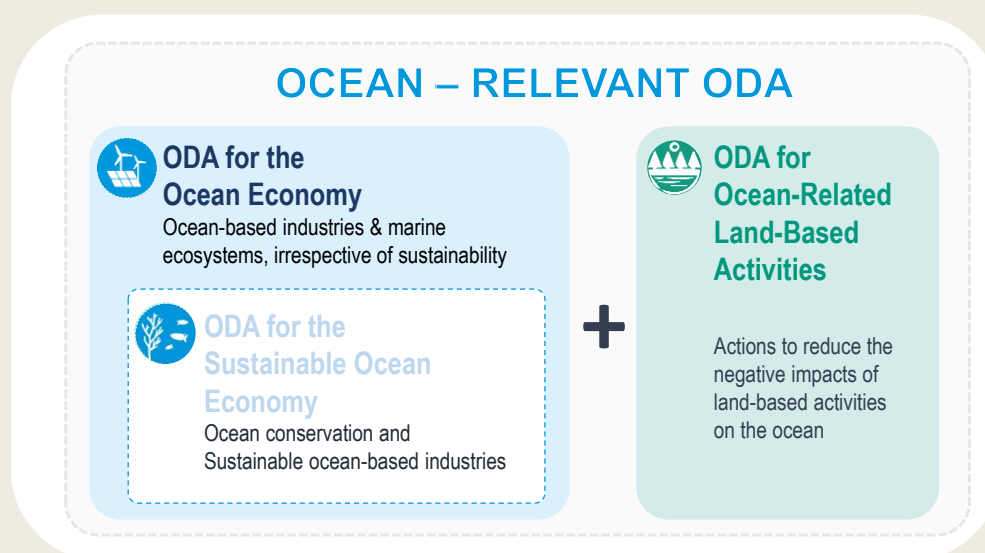
For these reasons and as part of the Sustainable Ocean for All initiative, the OECD has started to quantify and track global development finance for the ocean, detailing its scope, sources and destinations and providing estimates of the share of this finance that is sustainable. A specific methodology was developed for this purpose that lays the foundations for a common understanding of what defines ODA interventions in support of sustainable ocean economies. This methodology and the key indicators to track ODA for the ocean economy are briefly explained in Box 4.1 and more extensively discussed in Annex 4.A. The remainder of this chapter builds on an analysis of ODA flows for the sustainable ocean economy as identified via this methodology.

Box 4.1. Indicators and definitions used in the analysis of ocean-related ODA

Evidence on global finance for the ocean from its various sources – private, public, domestic and international – remains scarce and scattered. It is currently not possible to have a comprehensive view of how much finance reaches ocean-based sectors and what percentage of this can be considered sustainable. To contribute to fill this gap and as part of the Sustainable Ocean for All initiative, the OECD has begun to quantify and track global development finance for the ocean, detailing its scope, sources and destinations and providing estimates of the share that is sustainable. Development finance estimates are also produced for funding towards land-based activities that reduce negative impacts on the ocean (e.g. waste management and water treatment).

The tracking of ocean-relevant ODA is based on the statistical data made available by the OECD DAC Creditor Reporting System (CRS), which provides a unique and comprehensive source of activity-level development finance. As there is no marker or immediate way to retrieve data on ODA for the ocean,² a specific methodology was developed to generate the first official estimates of ocean-relevant ODA. These provide the quantitative base for the analysis in this chapter and inform the report overall.

Figure 4.3. Three key indicators to track ocean-relevant ODA



Source: Authors

Ocean-relevant ODA estimates are organised around three key indicators (Figure 4.3):

- **ODA for the ocean economy:** Also referred to as ocean ODA or ODA for the ocean, this is ODA in support of ocean-based industries and marine ecosystems, irrespective of whether the support explicitly takes sustainability considerations into account. For instance, fisheries projects with no specific focus on sustainable development would be included, as would projects in support of offshore oil and gas.
- **ODA for the sustainable ocean economy:** This is a subset of ODA for the ocean economy. It identifies ocean conservation activities as well as support for ocean-based industries that integrates sustainability concerns. For instance, projects in support of mangroves restoration would be captured, as would sustainable coastal tourism and sustainable fisheries projects.

- **ODA for reducing ocean pollution from land:** This captures land-based activities that reduce negative impacts and/or have a positive impact on ocean, such as water treatment and waste management projects. This indicator is included in recognition of the strong interrelation between land-based and marine activities and the fact that most ocean pollution originates from land-based activities.

The indicators draw on definitions of the ocean economy and the sustainable ocean economy.

Ocean economy: The OECD (2016^[3]) defines the ocean economy as comprising ocean-based industries that depend, either directly or indirectly, on ocean resources (Annex 4.A). These include traditionally exploited marine resources, including living resources (fisheries) and non-living resources (oil, gas and marine manufacturing and construction). The definition also covers the use of oceans for tourism, education and shipping and ocean-based industries that have recently emerged due to advancements in science and technology such as offshore wind, tidal and wave energy; marine aquaculture; seabed mining for metals and minerals; and marine biotechnology. The definition of ODA for the ocean economy relies on this ocean economy definition.

Sustainable ocean economy: The sustainable ocean economy emphasises the sustainable use and conservation of natural resources in the world's oceans, seas and coastal areas, in line with the 2030 Agenda and the SDGs pertaining to the ocean. The ODA for the sustainable ocean economy indicator thus captures ODA in support of ocean-based and coastal economic activities that explicitly integrate sustainability such as sustainable fisheries (SDG target 14.4); specific activities to enhance ocean health (targets 14.2 and 14.3); activities to conserve marine and coastal ecosystems (targets 14.2 and 14.5); and activities to increase resilience and climate action. The identification of activities belonging to the sustainable ocean economy is largely based on development partners' self-assessment of sustainable and resilient activities in the data reporting process. Despite some limitation inherent to keyword search methodologies, this approach is the best approximation currently available and it provides a solid basis to further enhance the understanding and measurement of what sustainability means with regard to the ocean economy. The methodology for defining and calculating ocean-relevant ODA indicators is briefly presented in Annex 4. A.

Note: The terms "sustainable ocean economy" and "blue economy" are sometimes used interchangeably to identify economies where ocean resources and marine ecosystems are used sustainably and conserved. The terms ODA and concessional finance are used interchangeably. Figures in this report refer to ODA commitments. The definition of ODA is available at <http://www.oecd.org/development/financing-sustainable-development/development-finance-standards/officialdevelopmentassistance/definitionandcoverage.htm>.

The volume of ODA for the ocean is growing, but remains small and only partially focused on sustainability

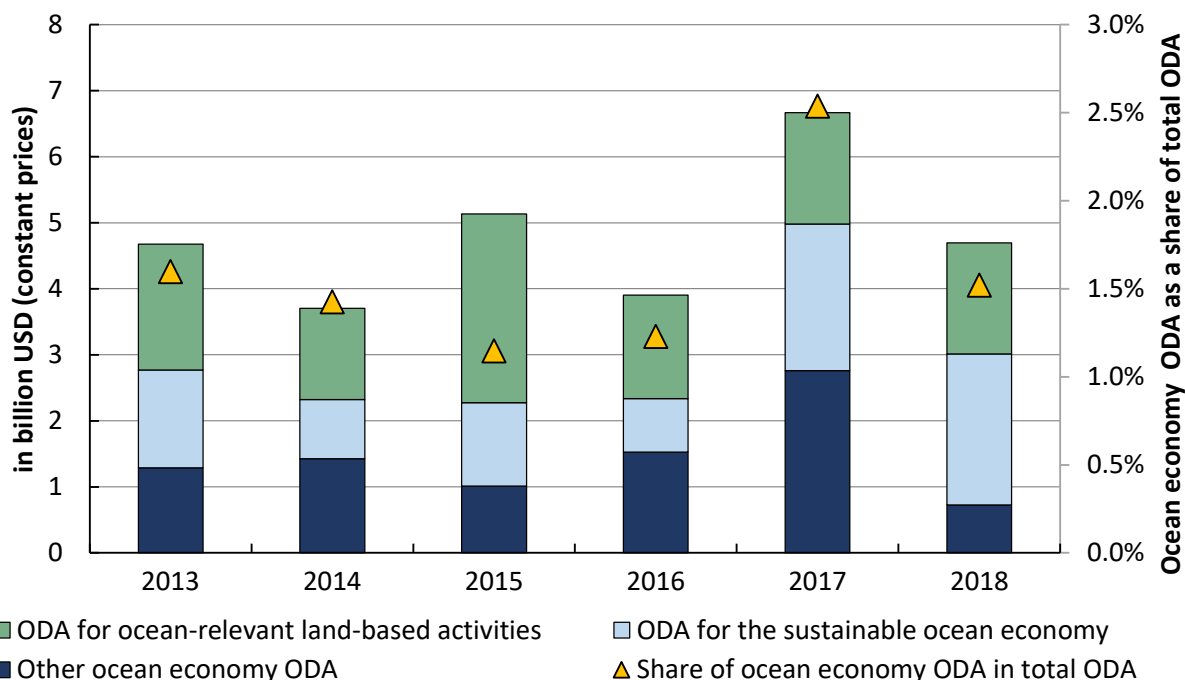
The original ODA estimates produced for this report suggest that, over the 2013-18 period, an average of USD 3 billion of ODA a year was allocated for the ocean economy, equivalent to 1.6% of global ODA over the same period. Ocean economy ODA flows spiked in 2017 (Figure 4.4) and their growth rate in 2013-18 outpaced that of global ODA (+57% vs +17%).

Despite this acceleration, ODA for the ocean economy accounts for only a fraction of both global ODA (1.6%) and ODA to all coastal and island countries (1.9%) in 2013-18. More importantly, only about half (51%) of ODA for the ocean economy contributed to sustainable ocean economies, i.e. to ocean conservation and sustainable coastal and ocean economic activities. ODA for the sustainable ocean economy totaled USD 2.3 billion in 2018 and USD 1.5 billion on average a year in 2013-18, equivalent to 0.8% of global ODA in 2013-18 and 1% of all ODA to coastal and island countries.

In 2013-18, development partners have also provided concessional finance for land-based activities that reduce negative impacts on the ocean including projects to enhance waste management systems and for wastewater treatment. This support amounted to USD 1.7 billion of ODA in 2018, in line with the annual average in 2013-18.

Figure 4.4. Ocean-relevant ODA peaked in 2017 but still only accounts for a fraction of global ODA

ODA commitments in constant 2017 prices, 2013-18

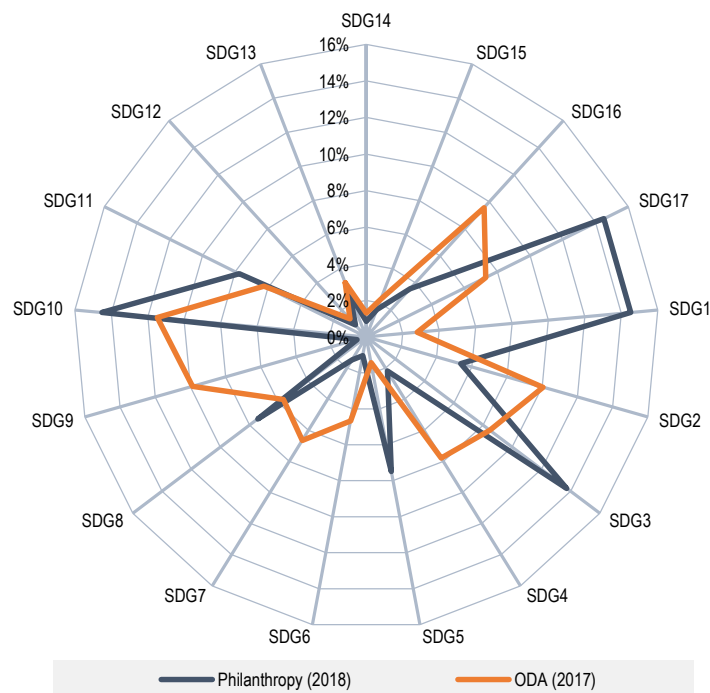


Source: Authors' calculations based on OECD (2020^[1]), *Creditor Reporting System (database)*, <https://stats.oecd.org/Index.aspx?DataSetCode=crs1>.

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The low level of concessional finance for the conservation and sustainable use of the ocean can be understood by comparing it to concessional finance for other SDGs. Not all SDGs require the same level of financing and, as illustrated in Table 1.1. in Chapter 1, their interconnectedness determines that targeting some SDGs can indirectly contribute to achieving others (UN, 2015^[4]; International Council for Science, 2017^[5]). However, across SDGs, SDG14 is largely under-prioritised. Figure 4.5 shows it is among the least targeted of the SDGs, both by official development finance and private philanthropy for development.

Figure 4.5. SDG 14 is among the least funded SDGs by both Official Development Assistance and philanthropic development funding



Note: The relative share for each SDG is calculated based on the sum of 2017 ODA commitments towards each SDG, as reported on the OECD SDG Financing Lab website, <https://sdg-financing-lab.oecd.org>. Philanthropy data are 2018 commitments as reported in the Creditor Reporting System database, <https://stats.oecd.org/Index.aspx?DataSetCode=crs1>.

Source: Authors' calculations based on OECD (2020^[1]), *Creditor Reporting System (database)*, <https://stats.oecd.org/Index.aspx?DataSetCode=crs1>.

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Box 4.2. Mainstreaming gender equality in the sustainable ocean economy

SDG 5 (gender equality and women's empowerment) and SDG 14 are inextricably linked

Women are essential to the sustainable ocean economy. Roughly 15% of harvesting jobs and 90% of fish processing jobs are done by women (Siles et al., 2019^[6]). However, their role in many ocean-based sectors is unrecognised and informal, and they are marginalised, under-represented and effectively excluded from many economic opportunities and decision-making positions. As leaders, citizens, resources users, educators and scientists, women need to be empowered to engage more in ocean conservation and sustainable use. To bring this about, affirmative actions are required to mainstream gender equality best practices into every sphere of ocean-based activities.

The role of women in the fishery sector illustrates this state of affairs. In the fisheries industry, women's role along the value chain is often undervalued and under-recognised, making it difficult even to collect information about their actual involvement in the industry. This in turn gives rise to their under-representation in official statistics, which to date still struggle to capture the extent of the female contribution to the fishing industry, especially in developing countries (Lentisco and Lee, 2015^[7]). This type of widespread under-representation, very common in other ocean sectors as well, translates into a deeply

unequal playing field. Traditional gender roles relegate women to activities that are less profitable and exclude them completely from resources management and decision-making processes. This exclusion undermines women's negotiation power, disregards their needs, and magnifies their vulnerabilities by negatively affecting women in terms of salary, labour force participation, economic opportunity and empowerment.

Development co-operation for sustainable ocean economies and gender equality

Development co-operation has increasingly focused on gender. The volume of ODA with a principal or significant gender component grew from USD 54 billion in 2008-09 to USD 94 billion in 2016-217, a +79% increase. In July 2019, the OECD DAC adopted the first international standard to prevent sexual exploitation, abuse and harassment in the development community, showing its strong commitment to address violence against women within the development co-operation sector itself (OECD DAC, 2019^[8]).

In the ocean space, development co-operation supports gender equality with projects in several sectors including fisheries, aquaculture, maritime transport, tourism, coastal disaster risk reduction and marine protection. In each of these domains, women face specific challenges. Development co-operation needs to increasingly take into account their particular demands, rights and vulnerabilities. Data show that across ocean-based sectors, donors are increasingly mainstreaming gender equality in their policy design and implementation. In 2013-18, approximately USD 4.7 billion (26%) of the USD 17.7 billion allocated for projects to support the ocean and its economic activities integrated a gender component. As shown in Figure 4.6 the gender focus of ODA for the ocean economy varies across sectors and is highest in the fishery sector.

Figure 4.6. Share of ocean economy ODA that promotes gender equality

USD commitment (2013-18 averages)



Source: Authors' calculations based on OECD (2020^[1]), *Creditor Reporting System (database)*, <https://stats.oecd.org/Index.aspx?DataSetCode=crs1>

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Development co-operation is supporting women's empowerment in the ocean economy in a variety of ways, including by enhancing women's access to training, credit and production tools. Despite these positive examples, there is room for development partners to improve their support to mainstreaming gender equality and to help identify and address gender gaps in every ocean economy sector. A gender-sensitive lens needs to become a default option in ODA support to sustainable ocean economies. Development partners can further support the active participation of women in resources management and decision making, promote women's enhanced access to productive tools and resources, and advocate for an increased recognition of women's role in ocean-based sectors so that they can earn fair compensation for their work and have greater power to determine their future.

Bilateral providers account for the bulk of ocean ODA but they integrate sustainability less

In 2013-18, 60 of the 74 bilateral and multilateral development partners reporting to the CRS extended concessional finance for the ocean economy. A few partners provide the bulk of this funding. Over this six-year period, the top five accounted for 65% of the total: Japan, the European Union (EU), the International Development Association (IDA), Germany and France (Figure 4.8).

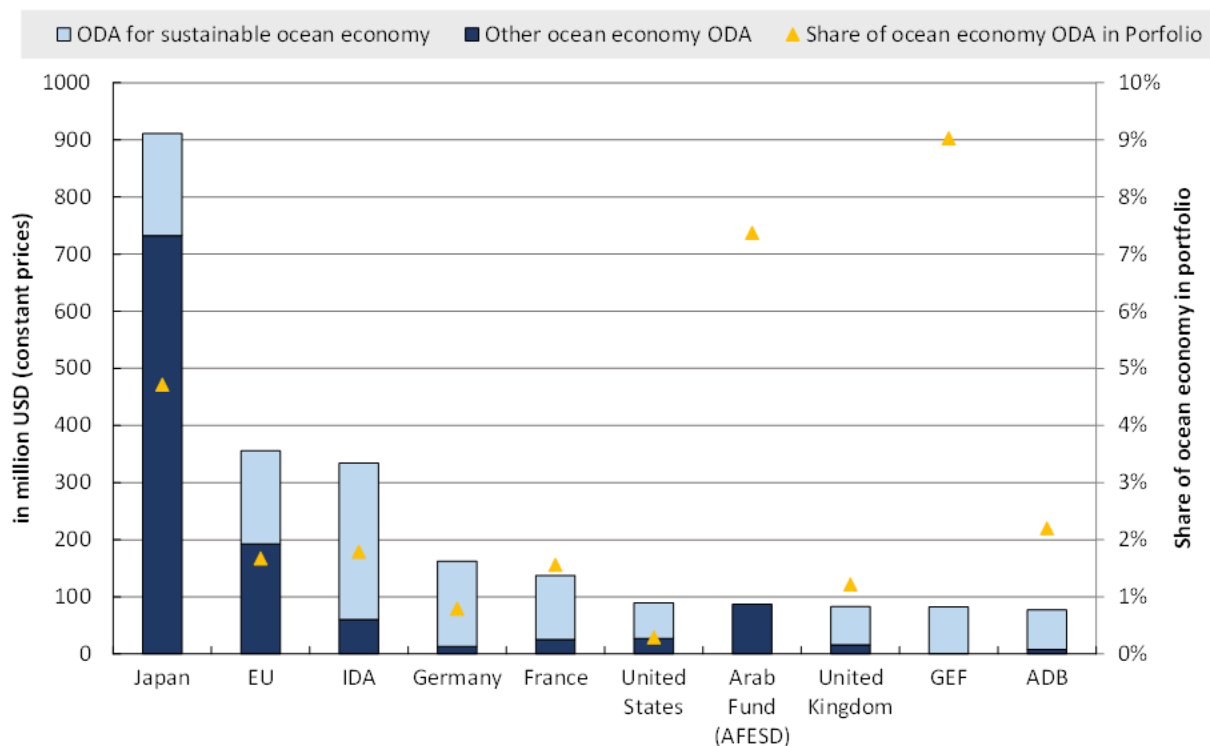
Collectively, bilateral partners committed larger volumes of concessional finance for the ocean economy than did multilateral providers, accounting for 76% of the total in 2013-18 or USD 2.2 billion on average a year. However, only 44% of bilateral ODA integrated sustainability, on average, against 72% for multilateral partners (Figure 4.7). For 43% of development partners, half or more of their ocean ODA does not integrate sustainability.

More broadly, support for the sustainable ocean economy weighs lightly on the ODA portfolios of individual providers of development co-operation, even those providing the largest volumes of ODA for the sustainable ocean economy in absolute terms. Across top providers, the share of ODA for the sustainable ocean economy ranges from 9% of the global ODA portfolio of the Global Environment Facility (GEF) to 0.2% of Germany's ODA. The shares of other providers are in between, at 2% for ADB, 1.5% for IDA and 0.9% for Japan. Across all providers, the Nordic Development Fund leads with 13.7% of its total concessional finance in 2013-18 prioritising the sustainable ocean economy.

The low prioritisation shown in the data is reflected in the widespread lack of high political commitment or specific strategies in support of the sustainable ocean economy. Fewer than two fifths of DAC members identify ocean sustainability as a priority or matter of concern in their developing co-operation strategies or policies (OECD Survey). One reason is that available data and analysis to guide policy making and interventions in this area are insufficient, both in developing countries and at development partner level. Evidence from the Sustainable Ocean Economy Country Diagnostics conducted for this report suggests that the lack of dedicated strategies and of a one-stop shop at headquarters for development co-operation on the sustainable ocean economy seems to limit development partners' ability to respond rapidly and most effectively to developing countries' requests for support in this area, even when this is a clear priority for developing countries.

Figure 4.7. Top providers of ocean economy ODA

ODA Commitments, annual averages in 2013-2018

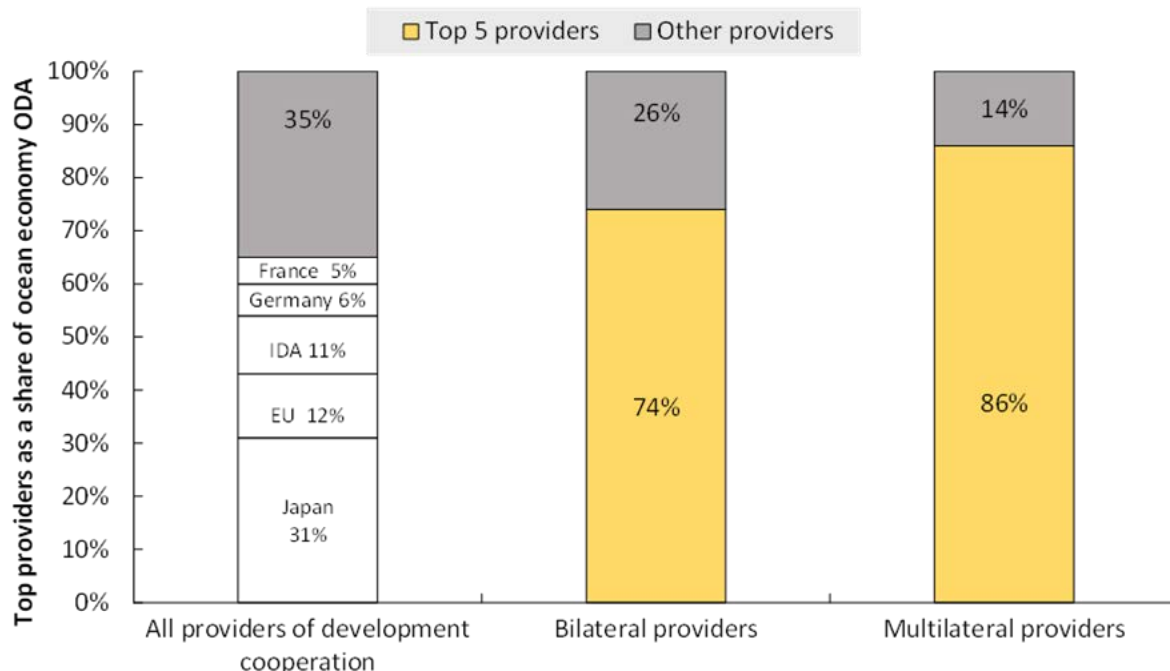


Source: Authors' calculations based on OECD (2020^[1]), *Creditor Reporting System (database)*, <https://stats.oecd.org/Index.aspx?DataSetCode=crs1>.

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Figure 4.8. A few development partners provide the bulk of ocean economy ODA

ODA commitments, constant 2017 prices, 2013-18 cumulative shares



Source: Authors' calculations based on OECD (2020^[1]), *Creditor Reporting System (database)*, <https://stats.oecd.org/Index.aspx?DataSetCode=crs1>.

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Ocean-related ODA flows concentrates in a few recipient countries, driven by large projects that do not integrate sustainability

ODA for the ocean economy is concentrated in a few countries, with Indonesia the top recipient, followed closely by Viet Nam and Morocco (Figure 4.9).

In 2013-18, the top 20 recipients together accounted for 75% of ocean economy ODA and received, on average, allocations that were almost 10 times bigger than were received by the next 45 recipients combined (Figure 4.10). Only 4% of ocean economy ODA went to the bottom 50 recipients combined. Across country groups, over the 2013-18 period, lower middle-income countries received the largest share of ocean economy ODA (54%). Least developed countries received 31% and upper middle-income countries 15%. This breakdown resembles overall ODA allocations by country group.³

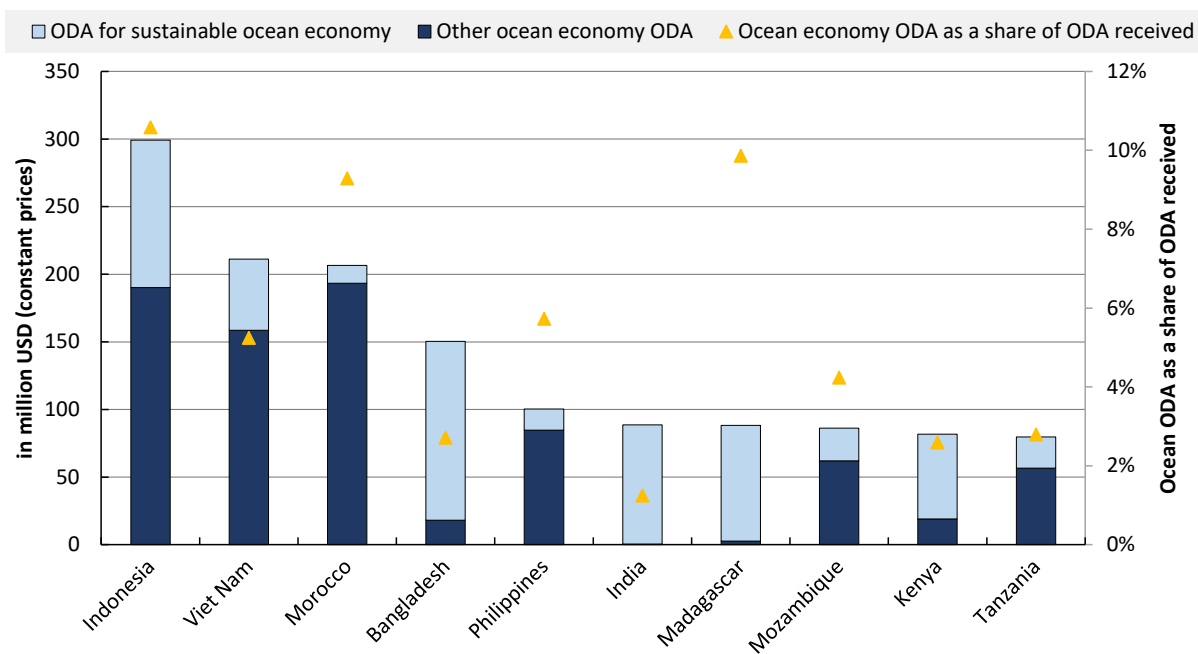
For many of the largest recipients of ocean economy ODA, the bulk of this assistance supports expansion of ocean-based industries without the aim to increase their sustainability. Most often these are infrastructure projects in maritime transport. Generally, only one third of the ocean economy ODA to the top recipients integrates sustainability.⁴ Sustainability was incorporated to a much higher degree on average (75%) in the small allocations to the bottom 50 recipient countries (Figure 4.10). These figures indicate that ODA, to a large degree, is used dichotomously, funding either ocean-based industries with no sustainability focus in top recipients, or ocean conservation through small allocations in small recipients. These figures also suggest that increases in ocean-related ODA have not been driven by greater

integration of sustainability into ocean-based industries or by larger investments towards the conservation and restoration of ocean ecosystems.

Among the top recipients, Bangladesh, India and Madagascar are exceptions in terms of the sustainability focus of ocean economy ODA; in 2013-18, the ODA received by the three countries integrated sustainability almost in their entirety (Figure 4.9). Bangladesh's high share of sustainable ocean economy ODA was primarily driven by projects promoting coastal resilience. Bangladesh, a low-lying country exhibiting high coastal vulnerability to natural hazards and high tides, received support from several donors during the six-year period to implement projects to increase the resilience of coastal population to natural disasters and climate change. In 2013, for example, IDA provided a USD 400-million concessional loan for a project of coastal embankment improvement in six coastal counties in southern Bangladesh that helped to rehabilitate polders and provide protection to an estimated 760 000 coastal inhabitants. In India, a large share of ODA for the sustainable ocean economy consisted of a USD 76-million project to establish ship recycling facilities in Gujarat. In Madagascar, the integration of biodiversity offsetting measures to protect coral reefs in the framework of the Toamasina Port Development project accounts for the relatively large share of its ODA that targets conservation and sustainable use of the ocean. The Japan International Cooperation Agency (JICA) promoted the project and provided a USD 400-million concessional loan to improve maritime connectivity in Madagascar while at the same time adopting measures to safeguard the marine ecosystems affected by this development.

Figure 4.9. Top recipients of ocean economy ODA receive small shares of funding integrating sustainability

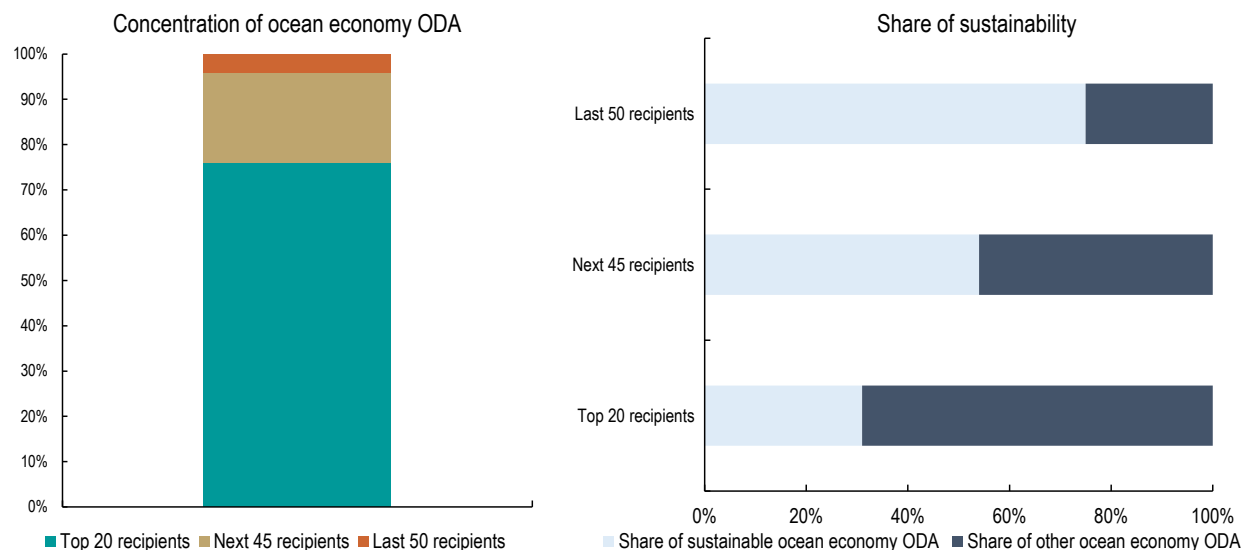
ODA commitments, annual averages 2013-2018



Source: Authors' calculations based on OECD (2020^[1]), *Creditor Reporting System* (database), <https://stats.oecd.org/Index.aspx?DataSetCode=crs1>.

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Figure 4.10. ODA is used rather dichotomously, either funding ocean-based industries with no focus on sustainability in large recipients or ocean conservation through small allocations in small recipients



Source: Authors' calculations based on OECD (2020^[1]), *Creditor Reporting System (database)*, <https://stats.oecd.org/Index.aspx?DataSetCode=crs1>.

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Despite their reliance on ocean resources, small island developing states receive only a small share of ODA towards the sustainable ocean economy

Small island developing states (SIDS)' small land masses and remoteness have historically been sources of unique economic and environmental constraints hampering development (OECD, 2018^[9]). But for many of these countries, sustainable ocean economies could turn their vast ocean resources – on average, more 2 000 times⁵ the size of their land masses – into a driver of economic diversification, resilience and inclusive development (OECD, 2018^[9]). Ocean-based sectors such as coastal tourism and fisheries are already the foundation of SIDS' economic activities and livelihoods and a source of foreign exchange and employment. This strong reliance on ocean-based sectors, however, leaves SIDS particularly exposed to the increasing degradation of the marine and coastal ecosystems on which these sectors depend. To help SIDS make progress on sustainable development, support them in addressing these increasing pressures and developing new opportunities from an expanding global ocean economy, (e.g. renewable energy, aquaculture, etc.) is therefore critical.

SIDS are taking bold stances on the sustainable ocean economy and are calling on the international community to support their ambition. SIDS have identified sustainable ocean economies as an SDG accelerator, considering that investments in the sustainable ocean economy will have large multiplier effects across many other economic and social areas. These countries have become international leaders on the sustainable ocean agenda, organising regional and international events on the topic. Many SIDS also have developed blue economy strategies. The Seychelles' 2018 Blue Economy Strategic Framework and Roadmap, Mauritius' oceans economy road map, and Grenada's Coastal Blue Growth Masterplan are examples. Some countries have set up dedicated institutional arrangements such as blue economy ministries (e.g. Cabo Verde, Barbados, Grenada). Some have made important commitments on the blue economy. Cook Islands declared its entire exclusive economic zone (EEZ), equivalent to 1.9 million km²,

a multiple-use marine protected area – the world’s largest. Palau established its entire EEZ as a fully protected marine reserve, making it a no-take zone and banning all fishing and mining activities. SIDS have been pioneers in financial innovations for the ocean: the Seychelles, for instance, issued the first blue bond, as discussed in Chapter 5.

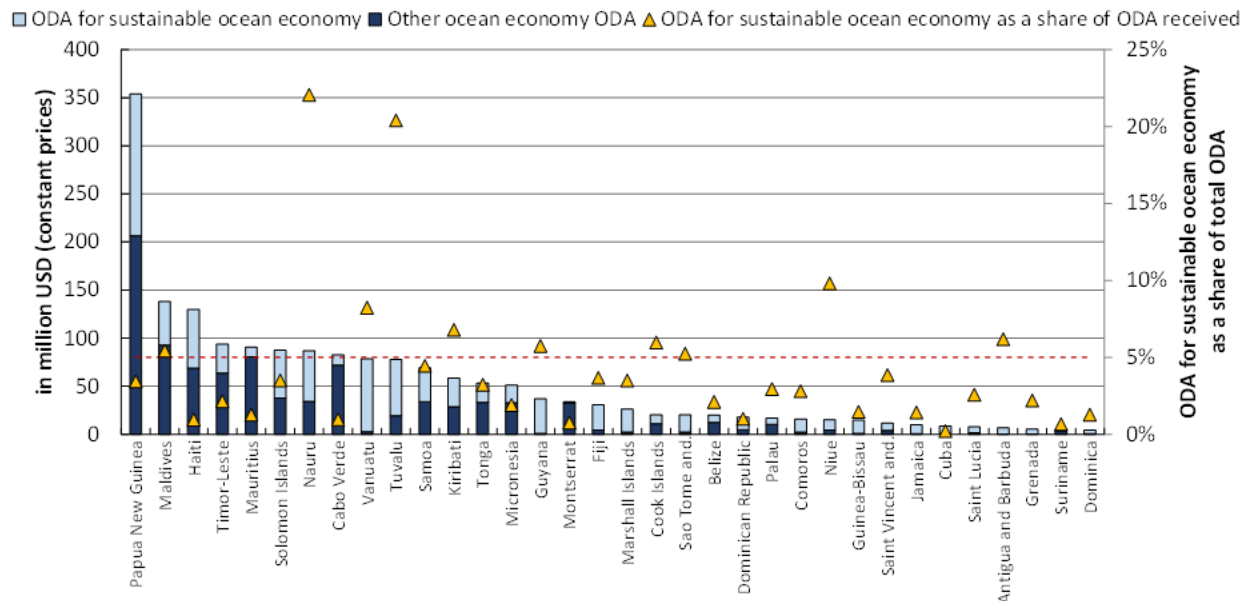
While remittances dominate SIDS’ external financing flows, ODA is the largest flow of external finance for two out of five SIDS, and many are heavily dependent on ODA for the provision of basic services (OECD, 2018^[9]). This reflects the fact that private investments remain limited in most SIDS, in large part because of their exposure to disaster risks, high perceived investment risks, and the often economically isolated nature and limited scalability of operations (i.e. often remote locations). These severely restrict opportunities for business development and integration in global value chains. In turn, public investments are constrained by volatile domestic revenues and limited fiscal space, since several SIDS are in debt distress or at risk of debt distress (OECD, 2018^[9]).

Despite the importance of ODA in the financing landscape of SIDS, and the importance of ocean-based industries and ecosystems for their economies and livelihoods, only 5.5% of ODA to SIDS targets the ocean economy, amounting to USD 1.8 billion in 2013-18 or USD 296 million a year on average. This figure drops to 2.7% for ODA for the sustainable ocean economy in the same period, totalling USD 871 million or USD 145 million a year on average. Among SIDS, the share of ODA channelled towards the sustainable ocean economy is highest in Nauru (20%), while it accounts for less than 1% of ODA to Cuba, Cabo Verde, Haiti and Montserrat (Figure 4.11). For SIDS as a group, ODA for the sustainable ocean economy has increased since 2017 but is still below the 2014 level.

Not only is the ocean important to SIDS. SIDS are important to the ocean and the benefits that all humankind derives from it. SIDS control 30% of the world’s 50 largest EEZs⁶ (UN, 2014^[10]). Considered custodians of the ocean, they are home to vast reserves of minerals, natural gas, fish and seafood. For instance, it is estimated that Pacific SIDS are home to the largest underwater cobalt-rich crusts, and they are already being approached by large companies for deep-seabed mining prospecting. While the science is not yet sufficiently developed to appraise the full range and scale of the impacts that such large-scale industrial operations would have on these already fragile natural ecosystems, they pose the risk of irreversible damage as well as major questions regarding appropriate governance and regulatory regimes. Development co-operation has an important role to equip SIDS with the expertise and capacities to assess and respond to these prospective projects in a way that takes into consideration both the global public good dimension and implications for the overall health of the world’s ocean.

Figure 4.11. For most SIDS, ODA for the sustainable ocean economy makes for a small part of the ODA they receive

ODA commitments, annual averages in 2013-18, constant 2017 prices



Source: Authors' calculations based on OECD (2020^[1]), *Creditor Reporting System* (database), <https://stats.oecd.org/Index.aspx?DataSetCode=crs1>.

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Least developed countries do not prominently engage on the sustainable ocean economy

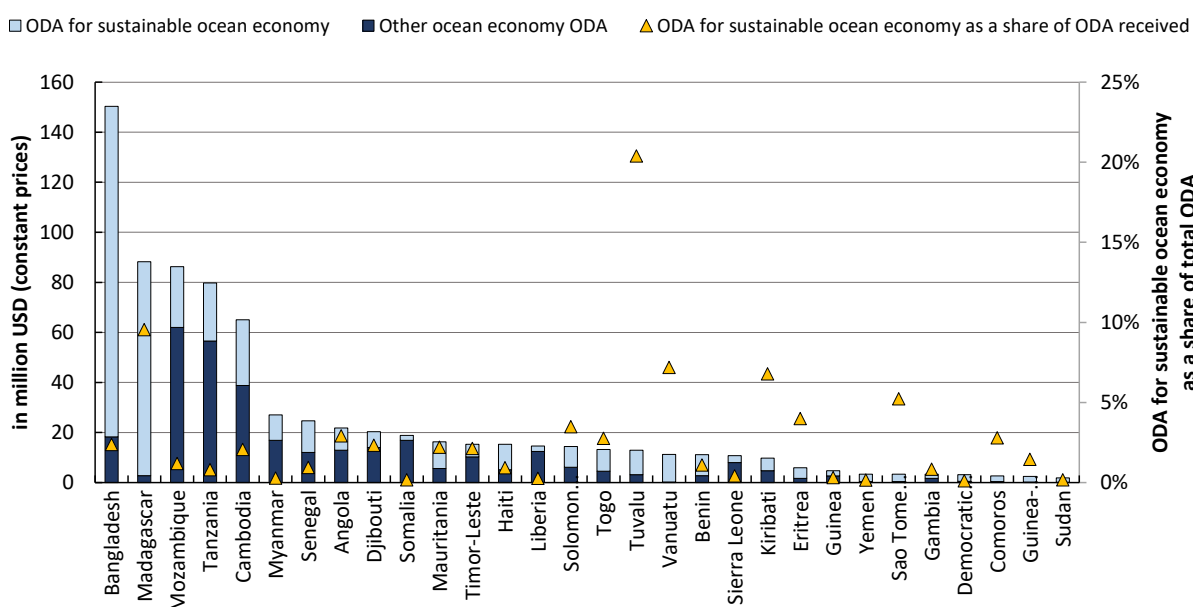
Together with SIDS, LDCs are a group of particularly vulnerable countries that the international community should make sure will be able to harness the benefits of the ocean economy. Nine of these countries also are SIDS (Annex 1A). However, coastal LDCs have been less assertive and proactive than smaller countries like SIDS in embracing the blue economy concept, largely because ocean-based sectors play a smaller role in supporting their economies and their populations' livelihoods. Nonetheless, several LDCs have established institutional arrangements and policy frameworks to use their blue natural capital more sustainably and as a driver of sustainable development. In 2017, Bangladesh created an inter-ministerial platform, the Blue Economy Cell, to develop a road map and co-ordinate initiatives among ministries on the sustainable ocean economy. Other countries, among them Cambodia and Mozambique, have folded ocean economy responsibilities into an existing ministry. In its 2013-30 National Strategic Plan on Green Growth, Cambodia, also a specific focus on blue economy development with sustainability.

The Sustainable Blue Economy Conference organised in Kenya in 2018 provided impetus to African countries, including some African LDCs, to pursue opportunities for shared prosperity from healthier oceans. At the conference, Liberia made a commitment to launch blue economy initiatives consistent with its national development plan and Pro-Poor Agenda for Prosperity and Development. To further galvanise ocean action domestically and in the region, Liberia then organised a Blue Ocean Conference in 2019 that culminated in a call for action to Liberia and the West Africa region to advance the blue economy agenda. Sudan made commitments around marine protection and the adoption of more sustainable fisheries practices.

In 2013-18, LDCs received ODA for the ocean economy in the amount of USD 4.5 billion (USD 758 million on average a year), of which 58% integrated sustainability. This represented 25% of all ocean economy ODA and 30% of the all sustainable ocean economy ODA. Over the period, ocean economy ODA to LDCs was on a downward trend until it peaked in 2017. Ocean economy ODA to LDCs predominantly targeted five sectors: maritime transport (43%), fishing (24%), coastal resilience (10%) marine protection (9%) and maritime security (3%). The five top LDC recipients together received approximately 62% of the total. More than 85% of the ocean economy ODA received by two the top five (Bangladesh and Madagascar) targets ocean conservation and sustainable use, compared to less than 40% of this ODA received by the other three (Mozambique, Tanzania and Cambodia) (Figure 4.12).

Figure 4.12. Ocean economy ODA to LDCs integrates sustainability by 58% on average

ODA commitments, annual averages in 2013-18, constant 2017 prices



Source: Authors' calculations based on OECD (2020^[1]), *Creditor Reporting System* (database), <https://stats.oecd.org/Index.aspx?DataSetCode=crs1>.

StatLink  <https://doi.org/10.1787/888934159620>

Mapping the range of sustainable ODA activities for the sustainable ocean economy across key areas

Development co-operation providers have conducted several ODA projects contributing to sustainable ocean economies in developing countries. This includes ODA to support the use of new technologies to enhance sea surveillance and security; measures to increase the value of fish products through certifications of sustainability; interventions to foster sustainable tourism; and projects to reduce the environmental impact and greenhouse gas emissions from ships and port infrastructure. These examples contribute to a common understanding of what constitutes sustainable activities across ocean-based sectors and offer insights into replicable practices. They also demonstrate that, compared to defining what is “green”, which is mainly associated to energy efficiency and reduced GHG emissions, sustainability in

the ocean economy is a more multidimensional concept. The ocean economy is comprised of many different sectors and improving sustainability may entail a different range of actions in each one of them.

The remainder of this chapter examines ODA allocations across the sectors of the sustainable ocean economy and then provides a more granular analysis of the range of sustainable projects in six specific areas/sectors of the sustainable ocean economy. The economic trends and domestic policy instruments to increase sustainability in most of these areas/sectors are explored in Chapters 2 and 3. Here, the range of ODA projects conducted to enhance their sustainability is spelled out to contribute to a common understanding of what constitutes sustainable interventions in each of them and provide examples of replicable practices. The six areas span existing and emerging ocean-based sectors and include an area specifically focused on ocean conservation and restoration. They were chosen for their general relevance to developing countries, although it is acknowledged that each country will prioritise a different set of ocean-based sectors according to its assessment of opportunities, comparative advantage and national interests. Therefore, the six areas by no means constitute a blanket prescription and were selected to provide more detailed information. The chapter also suggests how efforts to enhance sustainability might be stepped up across these six areas.

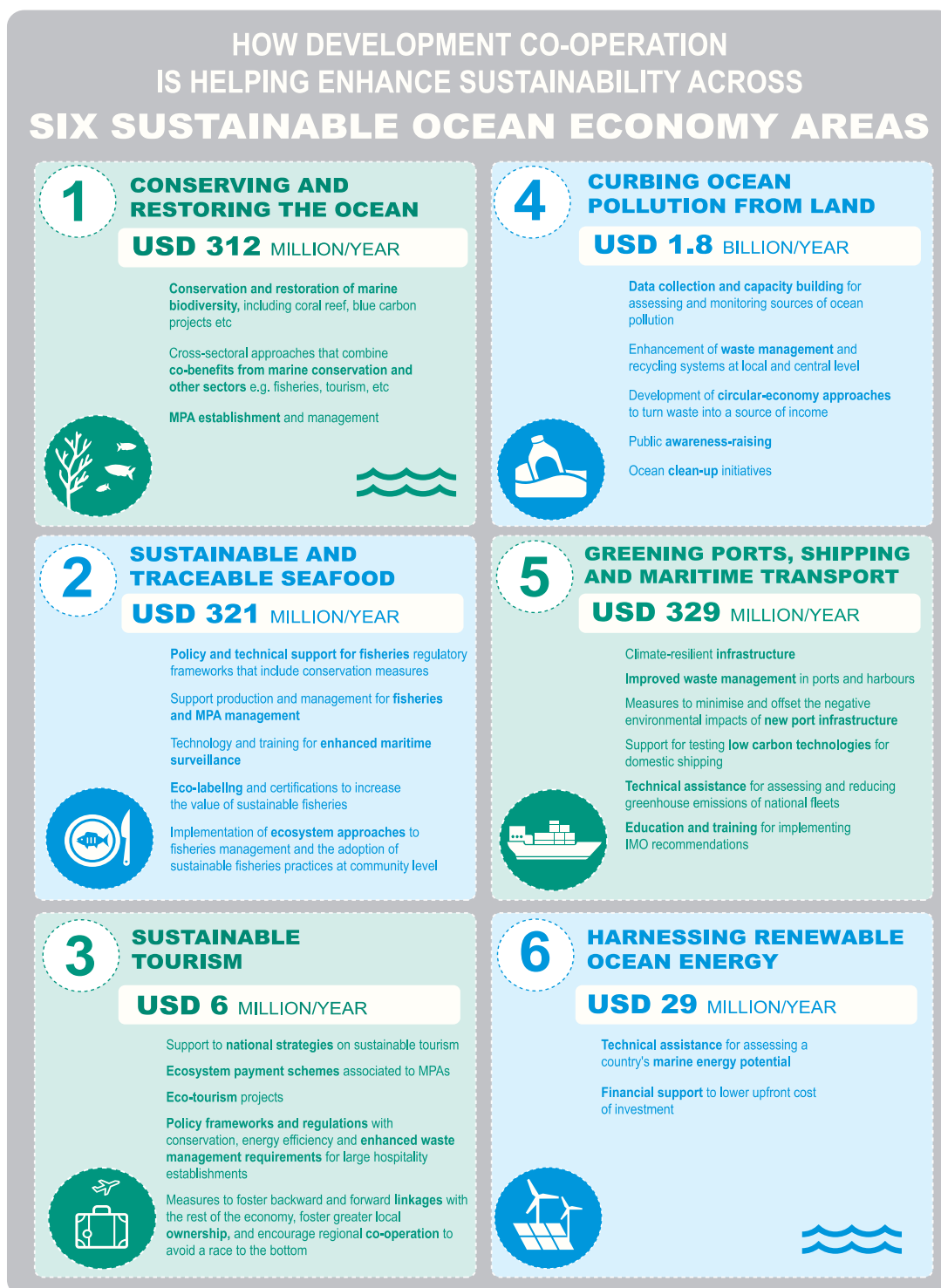
Allocations across sectors: A narrow approach?

ODA for the sustainable ocean economy is concentrated in three sectors: maritime transport and infrastructure (22.1% of the total in 2013-18), fisheries (21.5%), and marine protection (20.9%). ODA for the ocean economy is even more concentrated in maritime transport, which accounts for 47% of the total, and with 17% going to fisheries and 11% to marine protection. Support to these sectors integrates sustainability to varying degrees. Only 24% of ODA for maritime transport and infrastructure integrates sustainability compared to 66% for fisheries, although these shares are highly variable from one year to the next.

This may be too narrow an approach of development co-operation to the sustainable ocean economy, considering that realising the potential of the sustainable ocean economy will require investing in an array of sectors to both expand the sustainability of existing ocean-based sectors and harness opportunities from emerging sectors. The potential of each of these industries varies across developing countries (Chapter 2). Providers of development co-operation will need to prioritise their support accordingly, in line with developing countries' assessment and prioritisation of opportunities, comparative advantage and national interests.

Some DAC members, both at home and abroad, have embraced marine spatial planning (MSP) as a tool for an integrated management of coastal and marine resources to balance multiple objectives in the conservation and sustainable use of these resources (Chapter 3). However, development co-operation support to MSP remains limited; only 17 of the more than 600 conservation projects conducted in 2013-17 focused on it either in part or in full. Yet MSP presents several challenges that the international community could help address, including through the development and use of appropriate data, models and decision support tools to inform the planning process.

Figure 4.13. How development co-operation is helping enhance sustainability across six sustainable ocean economy areas



Note: USD amounts are annual averages in the 2013-18 period

Source: Authors

StatLink  <https://doi.org/10.1787/888934159639>

Conserving and restoring the ocean

Alongside the mainstreaming of a more sustainable use of ocean resources across ocean-based industries, specific actions are required to conserve and restore marine ecosystems. As noted, the marine protection sector receives the third largest amount of ODA for the sustainable ocean economy, after maritime transport and fisheries. In 2013-18, USD 312 million a year on average was allocated for marine protection, representing 6.4% of total ODA for general environmental protection in this period.

Interventions in this area of the sustainable ocean economy ranged from support to develop comprehensive, cross-sectoral approaches to the conservation and sustainable use of biodiversity and building capacity for local personnel to implement marine conservation monitoring and management strategies to specific conservation and restoration projects. In 2013-18, 14% of all ODA for marine conservation funded the establishment and management of marine protected areas (MPAs). In addition, 67% of marine protection projects integrated resilience, mainly through nature-based solutions such as mangroves.

One example of a cross-sectoral approach is the project for rehabilitation and sustainable management of mangroves, developed in 2007-10 as a partnership between Indonesia and JICA. The project combines mangroves restoration with eco-tourism and brings co-benefits to fishing communities. Mangroves were planted in 253 hectares across different parts of Bali and Lombok islands, where a mangrove forest had been cut to create space for the construction of fish ponds. Among other outputs, the rehabilitated mangrove forest provides fishery resources such as mangrove crabs and fishes. The project also established the Mangrove Information Center, which promotes eco-tourism and environment education.

In addition to cross-sector approaches, cross-country approaches may be needed due to the transboundary nature of natural marine assets. A positive example is the Coral Triangle Initiative, a partnership between the governments of Indonesia, Malaysia, Papua New Guinea, Philippines, Solomon Islands and Timor-Leste with support from GEF, Australia, the United States, ADB and other development partners. The Coral Triangle is one of the greatest centres of biodiversity on Earth, containing more than 75% of the known coral species and home to 363 million people, of whom 141 million live within 30 kilometres of a coral reef (Indonesia Ministry of Marine Affairs and Fisheries, 2019_[11]). The work of the Initiative is organised around the themes of assessment and action for threatened species, climate change adaptation, ecosystems-based management of fisheries, and MPAs.

Besides supporting specific marine conservation and restoration projects, development co-operation can support the enabling conditions for attracting more private contributions for marine conservation and restoration, for example from the tourism and fisheries sectors (Spergel and Moye, 2004_[12]). For-profit investments in conservation have recently been discussed as a potential solution for global funding gaps in conservation finance (Huwlyer et al., 2014_[13]) and in this context, ODA could play a role to “subsidise demonstration projects, reduce financial risk through collaterals, and promote low profit but high co-benefit projects” (Vanderklift et al., 2019_[14]). However, generating profitable returns for investors from conservation projects is challenging, and private investments in conservation remain small, marginal and geographically constrained (Dempsey and Chiu Suarez, 2016_[15]).

Sustainable and traceable seafood

Several providers of development co-operation have a long history of providing support to the fisheries sector in developing countries, not least because it contributes so substantially to livelihoods and food security. Among ocean economy sectors, fisheries is the second largest recipient of ocean economy ODA in 2013-18, receiving 21.5% of the total, or an annual average of USD 488 million. Of this amount, 12%, or USD 56.6 million on average a year, was allocated for aquaculture projects in recognition that aquaculture rather than increased wild catch will drive most fish production growth in the future (Chapter 2) (FAO, 2018_[16]).

ODA to the fisheries sector incorporates sustainability concerns to a greater extent (66%, or USD 321 million on average a year in 2013-18) than ODA to other ocean-based sectors. This reflects development partners' longstanding awareness of the need to balance conservation and sustainable use of fisheries resources. Development co-operation interventions for fisheries began moving away from an exclusive focus on production growth already in the 1990s to incorporate conservation, resource management and sustainable fisheries practices. This shift was driven by a growing awareness around fish stock depletion and the increase in illegal, unreported and unregulated (IUU) fishing, a major factor behind overfishing (Carneiro et al., 2019^[17]; Widjaja, Long and Wirajuda, 2020^[18]).

Development co-operation interventions for improved fisheries management show that co-benefits from conservation and sustainable use of resources can effectively be achieved and that improved fisheries management is associated with higher catches and positive economic outcomes. For instance, the United States Agency for International Development (USAID) programme in the Philippines, Ecosystems Improved for Sustainable Fisheries, or ECOFISH, resulted in a 24% increase in fisheries biomass and a 12% increase in employment through the integration of marine conservation and fisheries management (OECD Survey).

Several development projects enhanced value addition of fish products. One of these, Sustainable Market Access through Responsible Trading of Fish in Indonesia, also called SMART-Fish Indonesia, is a partnership between Indonesia, the United Nations (UN) Industrial Development Organisation and the Swiss Agency for Development and Cooperation to enhance the value of fish products through improved fisheries management practices, eco-labelling and new technologies for product traceability.

Effective fisheries management requires improved sea surveillance and monitoring as well as the availability of science and data on fisheries. The development community is providing support to both areas, although evidence from the Sustainable Ocean Economy Country Diagnostics conducted for this report suggests that country needs have been only partially met and remain significant. An example of co-operation to increase access to fisheries data include Italy's support to Palau and other small islands for assessment of potential effects of climate change on the distribution, long-term movements and local fisheries productivity of pelagic and near-shore resources. Another example is the training provided by Korea provided in Asia and Africa for ocean observation and hydrographic surveying to strengthen the evidence base on ocean observation, hydrographic surveying technology and climate change. Efforts to improve sea surveillance and monitoring in response to widespread piracy and illegal activity at sea have also included training for coast guards and maritime authorities and support to implement vessel monitoring systems and space technologies for mapping ocean resources.

Development partners are also supporting the use of innovative technologies such as blockchain to increase traceability of fish, help combat IUU fishing and curb human rights violations, including human trafficking and slavery on fishing boats. An example is a pilot project in the Pacific islands tuna industry launched by the World Wildlife Fund in Australia, Fiji and New Zealand; ConsenSys, a technology innovator based in the United States; the technology implementer, TraSeable; and Sea Quest (Fiji) Limited, a tuna fishing and processing company. The partnership will use blockchain technology to track tuna from bait to plate. USAID has partnered with the Walton Family, Packard and Moore Foundations on the Seafood Alliance for Legality and Traceability, or SALT, a global alliance that brings together industry, governments, traceability technology companies and civil society to accelerate learning and support collaboration around traceability approaches to legal and sustainable seafood.

Fisheries development co-operation interventions, however, need to better assess and address equality and distributional effects. Challenges remain to the effective involvement of coastal communities in fisheries management schemes and in the development of alternative income sources for fishers to effectively reduce overfishing. Greater effort also is needed to achieve gender equality in fisheries management schemes. As noted in Box 4.2, only 32% of development co-operation interventions in the fisheries sector in 2013-18 addressed gender equality.

Finally, fisheries subsidies can have impacts on the sustainability of fisheries, including outside the boundaries of the subsidising country's waters. As SDG Target 14.6 underscores, and as discussed in ongoing negotiations in the World Trade Organization, it is important to ensure that support policies do not encourage overfishing, illegal, unregulated and unreported (IUU) fishing, or other fishing practices that destroy ocean ecosystems and compromise the sustainability of resources. Policy coherence and commitment from the development co-operation community are key to ensuring donors' national or regional fisheries policies either support or at least do not undercut their development policies. Pro-active phasing out of potentially harmful fisheries subsidies should be encouraged, without necessarily waiting for an international agreement. Policy coherence is recognised as an important part of the Sustainable Development Agenda and SDG Target 17.14 calls on all countries to "enhance policy coherence for sustainable development" to strengthen the means of implementation.

High seas and straddling stocks are overfished at twice the rate of those within national jurisdictions (FAO, 2014^[160]). While developing countries lack the resources (e.g. large vessels) and technologies necessary to access deep-sea fisheries (Widjaja, Long and Wirajuda, 2020^[18]), they are nonetheless affected by high-sea fishing, as ocean currents connect what happens on the high seas to what happens close to shore. The UN General Assembly is currently negotiating a new international treaty for the conservation and sustainable use of biodiversity beyond national jurisdiction (BBNJ). The new treaty could provide an excellent opportunity to curb and address the impacts of overfishing on the high seas and enable a more inclusive and sustainable use of high seas resources to the benefit of all countries.

Despite the growing importance of aquaculture, the share of fishery ODA targeting aquaculture activities is small, partly because the sector is largely financed via large private investments, and declined in 2013-18. Despite limited ODA flows towards aquaculture, positive examples of development co-operation in this area exist. Norway's Fish for Development programme provides vocational training to the local labour force in developing countries to enable the development of large-scale aquaculture plants and supports research on fish health to enable the development of new aquaculture species. PROBLUE is also focusing part of its financing on sustainable aquaculture in its first annual work plan and budget. Out of the total budget of USD 8 million allocated for improved fisheries governance, approximately USD 1.4 million targets sustainable aquaculture with a specific focus on producing analytical work and building local capacity for disease prevention and biosecurity.

Sustainable tourism

Despite the importance of the tourism sector for many developing countries and the need to enhance the sustainability of the industry, as discussed in Chapters 2 and 3, only a tiny part of ODA is allocated to this sector. The small volume of ODA to this sector is partly connected to the heavy reliance of the sector on large private investments. In 2013-18, ODA for coastal tourism amounted to USD 9.7 million on average a year, of which 64% integrated sustainability. Development co-operation approaches to enhance sustainability of the tourism sector currently range from support for national strategies of sustainable tourism to ecosystem payment schemes associated to MPAs and support for certifications or eco-tourism projects.

Development co-operation could provide developing countries broader support for tourism policies and approaches that foster forms of tourism that reduce environmental degradation and favour strong local returns for inclusive, sustainable development. These are critical as mass tourism – the prevailing form of tourism – is associated with significant environmental degradation and large financial leakages in many developing countries (Chapters 2 and 3).

To enhance the social sustainability of the tourism sector, providers of development co-operation can support measures to foster backward and forward linkages with the rest of the economy and promote greater local ownership. Providers can also encourage regional co-operation, for instance on fees and taxes on large cruise companies for docking and landing, to avoid a race to the bottom. Through education,

training and support for the introduction of specific requirements, development partners can support local tour operators, locally owned business, and local suppliers in other sectors such as agriculture, food processing, handicrafts, trade, transport, and recreation and entertainment. Development co-operation providers can also support public and private investments in low-carbon transport options and the construction of resource-efficient tourism infrastructure (OECD, 2018^[19]).

Finally, providers of development co-operation could further support developing countries in testing innovative ways to raise tourist awareness and to channel some tourism revenues towards the conservation of natural assets. To raise awareness, Palau changed its immigration laws in 2017 and now requires that visitors sign a pledge upon entry, which is stamped in their passports, to act in an ecologically responsible way and protect Palau's environment and culture for the next generation. This compulsory promise is made directly to the children of Palau to preserve the country that is their home. Funding in support of the initiative came from traditional donors such as Italy as well as non-governmental organisations, private donors, local businesses and even community fundraisers, and the government of Palau. In Mexico in 2018, resources from the private sector were used to create a Coastal Zone Management Trust through a partnership between the government of Mexico, the UN and other development partners. Taxes on the tourism industry finance the Trust and are used to maintain and conserve 60 kilometres of reef and beaches in the area of Cancun and Puerto Morelos. The Trust proceeds also cover parametric insurance for coral reefs and beaches to protect the natural capital, businesses and communities in the event of natural disasters (Chapter 5).

Curbing ocean pollution from land

As highlighted in Chapters 1 and 3, pollution from land-based activities such as agricultural runoffs and waste is a key pressure on marine ecosystems. In 2013-18, development partners provided a total of USD 11 billion (USD 1.8 billion on average a year) for land-based interventions that reduce negative impacts on the ocean. Most of this funding (89%) targeted the improvement of waste management systems, while only 1% addressed agricultural runoffs. Concerns about the adverse impacts of marine plastic litter have led to a growing number of high-profile initiatives. Approximately USD 278 million (USD 46 million on average a year) of ODA was allocated to address marine plastic pollution in 2013-18. The annual average is expected to grow, as many commitments were made in 2019 and 2020 that are not yet reflected in the most recent, 2018, ODA figures.

As the G20 Action Plan on Marine Litter underscores, the leakage of plastics litter into the ocean can be addressed in a variety of ways throughout the plastics lifecycle. Among these are source reduction through the use of alternative materials, enhanced waste collection and recycling, and clean-up and remediation activities such as beach clean-ups and technology to collect plastics from the ocean. Effectively addressing marine plastics litter will require a combination of these approaches (Chapter 3). Development co-operation can provide support at all the various stages. At present, development co-operation to help curb ocean pollution is mainly focused on supporting central and local governments to enhance waste management systems and supporting local communities to improve collection and recycling through the production of handicrafts and construction materials from plastic waste.

For example, WasteAid, an UK Aid-funded initiative, works with communities in low-income countries to raise awareness on the problems caused by plastic pollution and develop practical alternatives to open dumping and burning of plastic waste, thus helping convert plastic waste into a source of sustainable business. The GEF Small Grants Programme, implemented by the UN Development Programme, has worked with local communities to test innovative solutions for plastic waste management through a circular economy approach, which promotes closed-loop production and consumption. The programme specifically targets the poorest and most vulnerable people in the community – women, youth and disabled people, among others – and works with them to develop circular economy approaches that combine traditional local knowledge, the application of modern science and technology, awareness raising, and advocacy. A

project in India offers a positive example of this. Nearly 700 ragpickers, including many socially marginalised and illiterate women, were trained in waste collection and recycling activities. As a result, approximately 10 tonnes of plastic waste are collected at five recovery centres in Bhopal every day, and cement industries in and around the city recycle the plastics, thus contributing to provide a source of livelihood.

The Australian government, in a good example of international policy coherence for a sustainable ocean economy, is implementing a phased waste export ban to ensure that Australia's waste is managed appropriately and will not create environmental problems in recipient nations. Global agreements and standards for waste management could be a useful addition to policy levers to reduce pressure on the ocean.

Greening ports, shipping and maritime transport

Ocean economy ODA primarily targets the maritime transport and shipping sector. In 2013-18, the sector received 47% of the total ocean economy ODA, or USD 1.4 billion a year on average. Most ODA to the sector comprised loans for the development and rehabilitation of port infrastructure. However, only 24% of the ODA to this sector in 2013-18 (USD 329 million on average a year) integrated sustainability. In other words, not even a quarter of this funding contributes to sustainable ocean economies.

ODA funded a range of activities to enhance the sustainability of maritime transport and shipping, largely in relation to infrastructure: from mitigating and offsetting the negative environmental impacts of maritime infrastructure projects and building climate-resilient port infrastructures to upgrading ship recycling facilities, and improving waste management in ports and harbours. Some projects focused on enhancing developing countries' domestic capacities to implement International Maritime Organization recommendations through education and training as well as through technical assistance to support countries in assessing emissions from their domestic fleet and testing low-carbon technologies for domestic shipping.

These projects demonstrate that the development community can, and has already successfully started to support developing countries in making progress along several of the dimensions that constitute enhanced sustainability of the maritime transport and shipping sector. However, the large share of investments targeting this sector and the relatively small share of these investments that integrates sustainability indicate that the development community needs to focus more attention on sustainability. Particularly neglected areas seem to be around integration of climate-resilience in port infrastructure, including the assessment of sea-level rise and natural disasters in the context of changing ocean and climate conditions. This was found to be the case in most of the Country Diagnostics conducted for this report.

Ocean economy ODA figures do not adequately address the social sustainability of ODA interventions in this sector, and further work will be needed in this area in the future. Broadly speaking, social sustainability of the maritime transport and shipping sector can be thought of as relating to the capacity of port and maritime transport investments to generate shared benefits for the local population and thus drive inclusive development and to the capacity of such investments to enhance gender equality in the sector. An example that emerged from the Country Diagnostics conducted for this report is the effort by Indonesia to enhance inter-island connectivity. By subsidising goods shipment lines – essentially sea toll routes – the country helped to hold down basic commodities prices in disadvantaged outer islands, with a positive contribution to social inclusion. With regard to gender equality, only 26% of the ODA to the maritime transport and shipping sector in 2013-18 promoted gender equality.

Harnessing renewable ocean energy

In net importer countries, as discussed in Chapter 2, the cost of fossil fuels is a heavy burden on government budgets, makes business and living expensive, and disproportionately affects poorer segments of the population (World Bank, 2019^[20]). Development co-operation can provide support to assess the

potential of marine renewable energies and help bear the upfront costs of investments in marine renewable energies.

In 2013-18, development partners allocated only USD 29 million on average a year for marine renewable energy in developing countries. But there have been several positive examples. One is the support from Italy to the Ocean Energy Resources Assessment of the Maldives, which is meant to appraise the energy potential of the sea currents of the Maldivian archipelago with the aim of identifying technological solutions for their exploitation. In another example, the EU is supporting the Cabo Verde 2018-40 Masterplan for Energy, under which optimal energy mixes are identified for each island. The master plan assessed that offshore wind energy production is not feasible due to strong currents and exposure to hurricanes, but determined that sun, wind and ocean waves – all found in abundance in Cabo Verde – are potentially exploitable energy sources that would lead to lower energy costs in the long run. Development co-operation providers are currently working to address the high perceived investment risks and relatively low financial viability related to the relatively small size of the Cabo Verde market.

Development co-operation interventions are also establishing synergies across ocean-based sectors, for instance through the use of renewable energy sources such as solar energy for fisheries and water desalination projects. In the Pacific, Italy supported Kiribati through the project, Solar Off-Grid Systems for Outer Islands fish centres. The first phase of the project has provided local fishing communities continuous access to chillers to use for their catches, resulting in increased profits and the substitution of fossil fuel with renewable energy sources. With the second phase, ten more fishing centres in the remote islands will be electrified with solar energy. In the Caribbean, Italy is supporting the construction and installation of a photovoltaic-powered salt water reverse osmosis desalination plant in Grenada. The plant, to be built in the rural area of the island of Carriacou, purify, collect and distribute about 300 m³ of water per day, alleviating the shortage of fresh water on the island through the use of renewable energy.

Enhancing the impact of development co-operation for sustainable ocean economies

As ecosystems change, fish stocks move and trade routes open or shift, the state of the ocean is not static, and ocean science and knowledge of it are constantly evolving. Therefore, it is essential that policy, decision making and resource management approaches, including those related to development assistance, reflect the most recent science and facts-based evidence.

To effectively support developing countries as they face new opportunities and challenges from the ocean economy, development co-operation needs to strengthen its evidence-base and tailor its toolkits and approaches so that it can provide coherent support and for sustainable ocean economies and maximise its impact. Specific priorities include the following:

- Support developing countries to develop a coherent, unified vision and direction for the sustainable ocean economy, where the complexity of inter-sectoral interactions is understood, environmental, social and economic values are integrated, and adequate resources are mobilised across sectors.
- Prioritise support to create decent local jobs, protect livelihoods, conserve nature and promote community-based approaches for the management of ocean resources to effectively help make both emerging and existing ocean-based sectors catalysts for long-term, inclusive and sustainable development. In established sectors, development co-operation should focus support on correcting the trends of financial leakages, economic exclusion and environmental degradation. In emerging sectors, support can focus on helping countries assess and balance the risks and rewards of new economic opportunities to effectively integrate, from the outset, community interests and environmental concerns in decision-making and achieve a sustainable use of resources.

- Track ODA for the sustainable ocean economy and its impacts based on common definitions and clear principles. The tracking of ocean-relevant ODA should become an integral part of the regular monitoring of ODA flows in order to provide transparency and accountability of ODA flows and promote mutual learning on the most effective ODA interventions and approaches for supporting sustainable ocean economies. An official taxonomy of ODA for the sustainable ocean economy could be developed to guide the tracking and monitoring of ODA flows and that include gender equality and social sustainability criteria.
- Explore new development co-operation schemes fit for transitioning to sustainable ocean economies, such as:
 - New co-operation schemes that take into account the global public good nature of ocean resources. The exploitation of marine and seabed resources for new ocean-based extractive sectors can produce short-term revenues for individual developing countries. However, financial gains can be highly concentrated and difficult to reconcile with inclusive development. Destructive environmental impacts, meanwhile, could be huge and extend well beyond national borders, with global consequences for the ocean's ability to regulate climate, store carbon, and provide livelihoods and food. New international development schemes might be needed to compensate developing countries for foregone revenues and ensure an international cost-sharing mechanism for the protection of the ocean as a global public good. For instance, a REDD+ – Reducing Emissions from Deforestation and Forest Degradation – scheme for the ocean could be explored.
 - Development co-operation schemes to strengthen developing countries' expertise and engagement capacity on new opportunities and counterparts on the ocean economy. An ocean for development co-operation scheme could help developing countries more effectively manage their commercially exploitable marine resources by providing support for achieving fair commercial deals and concessions. Such support should also focus on assisting developing countries assess the risks and potential gains from new market opportunities, including by involving coastal communities. These schemes would be very relevant at a time when the value of ocean resources is increasing as they open up for commercial exploitation, especially through emerging industries such as marine biotechnology and pharmaceuticals.

Beyond development co-operation policies, a wide range of policies affect the sustainability of ocean economies, from fisheries agreements and green transition targets to patent regimes for pharmaceuticals. Fostering further analytical work and policy dialogue on selected aspects of international policy coherence for a sustainable global ocean economy could ensure that its benefits are harnessed for all countries. Specific priorities include the following:

- Strengthen the independent study on how the sustainability of ocean economies in developing countries is affected by policies beyond development co-operation, such as policies on fisheries, tourism, investment and finance.
- Foster evidence-based dialogue across countries on the impact of policies beyond development co-operation on the sustainability of developing countries' ocean economies.

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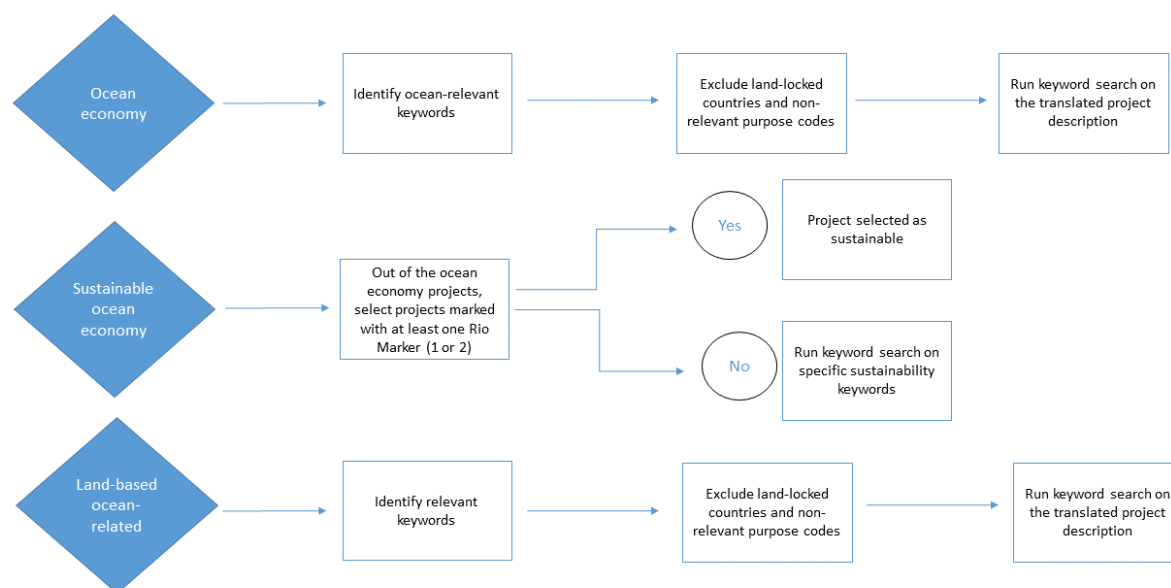
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Annex 4.A. Methodology for estimating ocean-relevant ODA

Currently, there is no internationally agreed definition of the sustainable ocean economy. Several different terms are often used interchangeably, but without a clear understanding of how they differ and where they overlap. In consequence, no predefined classification is available for identifying which official development assistance (ODA) activities can be considered as either directly contributing or indirectly relevant to achieving a sustainable ocean economy.

This report takes a practical approach to tracking ODA spending and activities that are relevant to the ocean. This approach is articulated around three ocean-relevant ODA indicators.

Annex Figure 4.A.1. Procedure to estimate the three ocean-relevant indicators

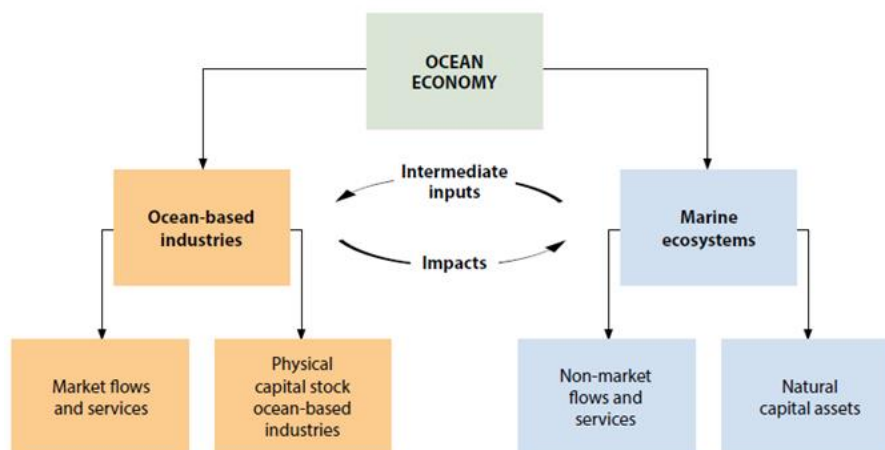


Source: Authors

ODA in support of the ocean economy irrespective of whether the support explicitly takes sustainability considerations into account

Identification of these indicators draws on the OECD definition of the ocean economy in the 2016 report, (*The Ocean Economy in 2030*, as “the sum of the economic activities of ocean-based industries, and the assets, goods and services of marine ecosystems” (OECD, 2016^[3]). Annex Figure 4.A.2 presents this definition as a conceptual framework and illustrates the two components captured in Indicator 1. Annex Table 4.A.1 lists established and emerging ocean-relevant sectors and industries.

Annex Figure 4.A.2. The ocean economy: A conceptual framework



Source: OECD (2016^[3]), *The Ocean Economy in 2030*, <https://dx.doi.org/10.1787/9789264251724-en>.

Annex Table 4.A.1. Emerging and established sectors and industries of the ocean economy

Established sectors	Emerging sectors
Capture fisheries and seafood processing	Marine aquaculture
Shipping and ports	Deep-water and ultra deep-water oil and gas
Shipbuilding and repair	Offshore wind energy
Offshore oil and gas (shallow water)	Ocean renewable energy
Marine manufacturing and construction	Marine and seabed mining
Maritime and coastal tourism	Maritime safety and surveillance
Marine business services	Marine biotechnology
Marine research and development and education	High-tech marine products and services
Dredging	

Source: OECD (2016^[3]), *The Ocean Economy in 2030*, <https://dx.doi.org/10.1787/9789264251724-en>.

ODA to ocean-based industries and ecosystems provides a basis for understanding how much support development partners are channeling towards the ocean economy and which ocean-related sectors and industries are prioritised.

To calculate Indicator 1, the following steps are applied:

1. The OECD Creditor Reporting System (CRS) data fields of Project Title, Sector, Purpose Name, Short Project Description and Long Project Description are merged in an English-translated version of the database. In this way, the process can take advantage of the full informative content in the database; it also increases the likelihood that all ocean-relevant projects will be captured.
2. CRS projects in landlocked countries and specific sectors that were assessed as non-relevant to the ocean (for example, Basic Health, General Budget Support, Development Food Aid), are excluded. All projects associated with rivers, wetlands and lakes are also excluded to prevent the possible identification of projects that target freshwater bodies.
3. Using ocean-relevant keywords (Annex Table 4.A.2.), a keyword search is run to identify the subset of the CRS database containing only ocean-related activities. If a project contains at least one of the keywords (or partial words) shown in Annex Table 4.A.2. , it is classified as ocean-relevant and incorporated in the estimate.

Annex Table 4.A.2. Ocean and ocean economy keywords used for Indicator 1

Ocean economy keywords	ocean , oceans , oceans., ocean., \(\oceans\), \(\ocean\), seabird, grouper, red snapper, oceanograph, oceanic, gulf, oceanfront, oceangoing, ocean-going, algae, oceanarium, coral, mangrove, wave energy, fish, coastal, boat, marin, maritim, mpa, unclos , sea , seas , seawall, seabed, seagrass, seafood, sealife, seashore, seaport, seaboard, seawater, sea-, seashell, seaside, sargassum, submarin, sub-marin, seabeach, seaweed, seasalt, desalini, problue, wharf , seagull, offshore, vessel, problue, pro blue, pro-blue, deep water, international water, dredg, blue abadi, blue action fund, estuarine, estuary, saltwater, reef, blue economy, ship , ships , green shipping, shipping industry , shipping sector, shipbuilding, aquaculture, mariculture, cruise , naval , reef, coastal tourism, marine tourism, maritime tourism, tidal, beach , beaches , port , ports , harbour , harbor , tuna , shark, pelagic, reef , whale, bivalve, mussel, dolphin, salt marsh, oyster, shrimp , prawn , turtle, coral, crab, lionfish, blue action fund, problue, blue carbon, caribbean biodiversity fund, cockle, clam
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Source: Authors.

ODA in support of the sustainable ocean economy

ODA figures on the sustainable ocean economy make it possible to quantify how much ODA is allocated towards ocean-related industries and activities that effectively integrate sustainability and how much towards specific actions to increase the resilience and the health of marine ecosystems. These figures also make it possible to determine the specific sub-sectors that are being prioritised within the sustainable ocean economy (e.g. sustainable fisheries, resilience, sustainable coastal tourism, etc.) and across providers and developing countries, and to see the range of instruments used.

Within the ocean economy ODA sample generated through Indicator 1, Indicator 2 captures only those projects that support specifically the conservation and/or sustainable use of marine and ocean resources. Indicator 2 identifies projects that are self-reportedly sustainable, in that are either reported as contributing to the Rio Conventions (i.e. marked through one of the Rio Markers for climate mitigation, climate adaptation and biodiversity); reported through the Environment Marker; or reported as contributing to environmental sustainability and resilience.

To calculate Indicator 2, the following steps are applied:

1. For bilateral donors and international organisations, Indicator 2 selects those projects among those in Indicator 1 that are marked through the Rio Markers for climate adaptation, climate mitigation and/or biodiversity and those that are marked through the Environment Marker.
2. While not all multilateral donors apply Rio Markers to their outflows, Multilateral Development Banks (MDBs) report on components of climate finance based on the MDB joint reporting approach. To make the estimate more homogeneous with the estimate for bilateral donors, projects identified as ocean-relevant and where banks report a Rio Marker component, the total amount is included in the estimate for Indicator 2.
3. In addition to screening them for markers, projects are screened through an additional keyword search aimed at identifying projects that address specific key areas for promoting sustainability and resilience. The keyword search was included for two reasons. First, the application of Rio Markers and the Environment Markers alone would lead to the exclusion of projects intended to build resilience through disaster risk preparedness, for example, or those supporting research to improve ocean health (SDG 14.A). Second, several projects in the CRS are not screened for Rio Markers and their sustainability can only be assessed by analysing the self-reported project description. The list of keywords used in this step is presented in Annex Table 4.A.3..

Annex Table 4.A.3. Keywords and filters used for Indicator 2

Markers	Environment, biodiversity, climate adaptation, climate mitigation
Sustainability keywords	sustainab , unclos , acidifica , mangrove , marine pollution , marine litter , marine debris , ocean debris , ocean pollut , ocean litter , ocean plastic , marine plastic , resilien , ecotouris , eco-touris , sargassum , conserv , marine protection , eutrophication , oxygen , ocean protection , mitigat , restoration , restore , restoring , sequestration , adapt , biodiversity , bio-diversity , biological diversity , bio-logical diversity , wildlife , waste , unclos , waste- , preserv , blue carbon , research , scientifi , science , mpa , protected area , renewable , green shipping , marine energy , wind energy , wave energy , tidal energy , biosphere , bio-sphere , bio sphere , offshore wind , off-shore wind , environment , disaster risk reduction , DRR , response preparedness , ecosystem , eco-system , nature-based solutions , blue carbon , carbon sink , SDG 4 , iuu , \\(iuu\\) , ocean health , habitat , over-fishing , overfishing , oceanograph , adaptation , sea level rise , sea-level rise , slr , \\(slr\\) , climate change , coral , turtle

Source: Authors.

ODA in support of land-based activities that positively affect the ocean

Indicator 3 makes it possible to quantify ODA in support of land-based activities that have a positive impact on the health of the ocean, such as actions to improve waste management and reduce agricultural runoff that pollutes the sea. This is a measure of indirect actions that are beneficial to the ocean and are thus considered as part of ocean-relevant ODA.

To calculate Indicator 3, the following steps are applied:

- The CRS data fields Project Title, Sector, Purpose Name, Short Project Description and Long Project Description are merged in an English-translated version of the database. In this way, the process can take advantage of the full informative content in the database; it also increases the likelihood that all ocean-relevant projects will be captured. CRS projects in landlocked countries are excluded, as are the sectors that were not considered relevant for the purpose of the indicator. All projects captured in Indicator 1 are also excluded to prevent overlap between ocean-based and land-based projects.
- Using relevant keywords (Annex Table 4.A.4), a keyword search is run to identify the sub-set of the CRS database containing only land-based, ocean-related activities
- If a project contains at least one of the keywords in Annex Table 4.A.4, it is classified as land-based, ocean-relevant activity and incorporated in the estimate.

Annex Table 4.A.4. Keywords used for Indicator 3

Land-based activities keywords	water treatment , agricultural runoff , waste , wastewater , sewage , marine pollution , marine litter , marine debris , ocean debris , ocean pollut , industrial runoff , ocean litter , ocean plastic , marine plastic , sewage , water resources conservation , river basins development , nutrient pollution
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Notes

¹ The countries are Australia, Canada, Chile, Fiji, Ghana, Indonesia, Jamaica, Japan, Kenya, Mexico, Namibia, Norway, Palau and Portugal. The HLP is supported by the UN Secretary-General's Special Envoy for the Ocean.

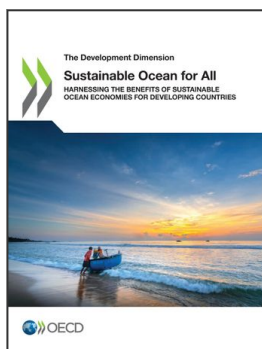
² The OECD Creditor Reporting System contains no marker or immediate way to retrieve data on ODA for the ocean. Our Shared Seas has made an attempt to provide estimates on ocean-related ODA, but its estimates do not aim to assess the share of ODA that goes towards sustainable activities. The limitations of this methodology and how it differs from the OECD ocean-relevant methodology are discussed in Annex 4. A.

³ In 2013-2018 LMICs received 42%, LDCs 41%, and UMICs 16% of global ODA.

⁴ This figure refers to 17 of the top 20 recipients of ocean economy ODA. Integration of sustainability in this ODA is much higher than the average for three of the top 20 recipients, namely: Bangladesh, India and Madagascar.

⁵ This figure refers to the average ratio of EEZ to land mass in the 34 ODA-eligible SIDS. This ratio is highest for Tuvalu (EEZ exceeds its land mass by 28 838 times), followed by Nauru (EEZ exceeds its land mass by 14 689 times).

⁶ This estimate considers the Cook Islands and the Seychelles as SIDS, although they both recently graduated from being ODA-eligible.



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