

**ANNEX I to Contract CC/FVorhies/CGL/kdm100805
TERMS OF REFERENCE**

For

**Thematic facilitation of “Economic Valuation of Transboundary
Marine and Coastal Resources” Large Marine Ecosystems e-
Forum session**

Project: Activity B2.2 of

*“Strengthening Global Capacity to Sustain Transboundary Waters:
The International Waters Structured Learning Activities and
Resource Network (IW:LEARN), Operational Phase”
(UNDP/UNOPS)*

Project No. (full project): PIMS 2838 GLO/03/G41/A/G/31

Reference No. (sub-contractor): 76453-000

Financing agency:	GEF
Implementing agency:	UNDP
Executing agency:	UNOPS
Subcontractor/ “Partnership Activity Lead”:	IUCN GMP
Geographical coverage:	Global
Implementation dates (indicative):	Sept-Dec 2005

Status:

***Final
Draft***

Date of preparation of the TOR: August 8

I. Background and Justification

The operational phase of the International Waters Learning Exchange and Resource Network (IW:LEARN) project includes “structured learning” activities for aquifers, lake basins, river basins and Large Marine Ecosystems (LMEs). IUCN-Global Marine Programme (GMP) serves as the Partnership Activity Leader for structured learning related to LMEs. This initiative intends to enhance transboundary waters management of planned and ongoing LME (and linked river basin projects) through sharing experiences among partners within the GEF International Waters Portfolio. To achieve this, the IUCN-Global Marine Programme is coordinating a 4-year series of topic-based learning activities through (A) face-to-face meetings and (B) an electronic internet forum between regional projects around the world.

Project time: 10 Jan 2005 – 30 Sept 2008

Total budget for 4 year period: 159,850.00 \$US

A. Face-to-face meetings – Large Marine Ecosystem-focused discussions take place during sessions of at least two International Waters Conferences over the four-year period of the project. The first conference was held 20-25 of June 2005 in Salvador, Brazil, where GMP organized and facilitated three “LME Working Group” sessions. The event gave participants the opportunity to tailor the learning project’s objectives to their specific needs and interests. The topics identified as priorities for subsequent discussions are listed below. Other issues may be taken on board when working group members (here equal to e-Forum participants) consider it necessary.

Annex II contains a short summary of the conference objectives and a summary report of the three marine sessions where these learning priorities and other technical issues were discussed (detailed discussion notes are available upon request).

B. Thematic e-Forum dialogues – The e-Forum dialogue (hereafter e-session) intends to complement and increase the impact of the conference outcomes, and thereby of the learning initiative as a whole. It focuses on an exchange of practical experiences related to the specific topics identified above - within the group of managers from different LME projects, representatives of the GEF Implementing Agencies and GEF Secretariat. Consecutive topics for discussion are determined by the needs of the participating group and are envisaged to change on a quarterly basis. During the time from April (project launch) until July 2005, the e-Forum has been used for introductions within the participating group, a first inception of thematic areas and initial priority-setting. It has also been used to prepare for the IW Conference held in June. A summary note of activities during this first inception period of the project (exactly March 22 – July 31) can be found in Annex II.

Description of Project Status (activities since inception)

- Launched the IW:LEARN “Structured Learning” for Large Marine Ecosystems on March 22, 2005 to a e-list of nearly 100 LME managers
- Period of introductions with contributions from 25 participants within 2 weeks of launch
- Initial discussions on economic valuation, institutional set up and governance
- Maintenance of technical dialogue
- Identification of discussion themes and external experts/advisors
- Planned and facilitated three LME break-out sessions at the IW Conference in Brazil
- Finalized the list of e-session topics for the forum, based on a consultative process via e-mail and interactive discussions at IW Conference

- Completed summary documentation of project, preliminary e-forum discussions, and reports on the IWC marine sessions (together with IW conference staff)
- Web postings IUCN pages on project launch date and during IWC Brazil
- Reported on project and conference at 6th LME Consultative meeting co-organized by NOAA, IOC, UNEP and IUCN (July 05)

Summary and excerpts of e-Forum activities (April-July 05) are provided in Annex II.

Priority Topics for Thematic e-Discussion, as identified during A and B

Topics for e-sessions have been finalized based on a consultative process via e-mail and interactive discussions in Salvador. The list of topics that have been prioritized comprises

1. **Economic valuation of transboundary marine and coastal resources** (Summer/autumn 2005)
2. **Incorporating socio-economics in LME management** (Winter 2005/2006)
3. **Governance and institutional arrangements for LMEs** (Spring/summer 2006)
4. **Public/private participation within LME planning and management** (Autumn 2006)

Topics to be potentially addressed in late 2006/2007 are project management, coastal zone management/MPAs, and ballast water management within LMEs.

Overview of IUCN LME Role and Interventions

IUCN – the World Conservation Union is a long-term GEF partner and leader in marine-related learning activities among its wealth of member countries, governmental and non-governmental organizations. It plays a distinct role as a convening and increasingly also capacity-building agency. IUCN's Global Marine Programme has supported marine and coastal ecosystem-based management in the LME context for many years. Capacity-building to improve ocean governance and manage LMEs, Marine Protected Areas, and high seas areas and coastal livelihoods issues are among the major strengths of the programme – making it well-situated to realize this project activity.

The IUCN GMP provides technical advice and support to the LME concept ever since its inception in 1990. Support has now expanded into a global partnership including UNESCO's International Oceanographic Commission (IOC), NOAA, UNEP and other institutions. GMP promotes the global experts dialogue on LMEs and assists this partnership through a series of annual LME consultative meetings, and by convening and facilitating several thematic expert groups from both projects and international

supporting agencies. We produced a line of LME-related publications under IUCN. In spring 2005, GMP took up the coordination of this LME structured learning project, fostering an exchange of experiences and lessons learned between regional projects under the GEF International Waters Programme. With this GMP assists to further promote the practical applicability of the LME concept in the context of regional GEF-supported projects.

Annex II:

- Summary note on recent IW Conference and summary report on three LME working group sessions facilitated by IUCN (detailed version available)
- Summary of project activities, particularly on e-Forum, from March 22 to July 31
- Summary and excerpts of e-Forum activities (period April-July 05)
- IUCN project contract with UNOPS (PIMS 2838 GLO/03/G41/A/G/31; as updated on July 4)

II. Scope and Purpose of e-Session Intervention(s)

Topic: “Economic valuation of transboundary marine and coastal resources”

e-Session time frame: Three months (one quarter), from 1 September until 1 December 2005 with option for extension by one month.

Audience and beneficiaries: Main beneficiaries of the e-Forum dialogue are LME (GEF) project managers around the world (mainly developing countries), Implementing Agency representatives of GEF-LME and marine-related projects, as well as GEF International Waters Programme staff and their steering committee.

e-Session objectives: The thematic e-sessions should focus on peer-to-peer experience sharing among LME projects, as opposed to traditional instructor-online-learning. However, during this recent IW Conference, participants expressed a clear interest in “baseline” (i.e. clearly lecture-guided) learning on the topic of economic valuation. The lecture guidance/facilitation should provide context and a first analysis of the topic, provide practical tools and advice for implementing economic valuation in situ, solicit participant’s experience/lessons learnt with regard to economic valuation, and serve to stimulate their questions, thoughts and ideas on the issue.

III. Aspects to be Addressed

The discussion group will be run as a series of thematic, quarterly e-sessions. There will be an overall coordinator of the e-sessions from IUCN, and an expert facilitator for each specific quarterly topic. The role and

expectations of the expert facilitator focusing on economic valuation of transboundary resources is as follows.

Expectations of e-session facilitator:

1. Develop an initial introductory lecture (in format of an electronic presentation) to kick off the e-session and to provide relevant generic information and context for the following months of discussion. This lecture will serve to introduce and explore the topic in general, accompanied by references to relevant literature and tools.
2. Develop three short lecture modules on specific topics relevant to the e-session. The modules will serve to deepen specific issues presented in (1.) and be accompanied by related key questions. Both the introductory lecture (1.) and lecture modules (2.) should stimulate email reactions in form of specific questions addressed to the forum participants and/or the facilitator, and specifically aim at sharing of experiences from other LME managers.
3. The facilitator will be expected to field questions about the lecture and modules for approximately 2-3 weeks following and to provide “further reading” on the topic, including peer-reviewed, widely accepted information and tools for economic valuation in the marine and transboundary resource context, with the intention of stimulating on-line discussion/experience sharing among participants.
4. Contribute expert input upon request, circa one substantive email every 1-2 weeks for the duration of the thematic session dialogue (e.g., ask questions to be addressed within shorter timeframes such as a week-by-week scenario; raise provocative issues as agreed upon with IUCN project staff to foster discussions). [may be part of point 3.]
5. Work with the IUCN project staff to plan e-session sequence and stimulate interactive discussion on specific topics that relate to this e-session.
6. Briefly summarize the substance of the e-Forum session and the information exchange that occurred. This may be used to develop a short publication (driven mainly by IUCN; possibly including a needs assessment and specific guidance for future donor investment/activities) focused on economic valuation considerations as they directly relate to LME management. Authorship credit would be given to the facilitator and IUCN staff.

7. Provide post-session feedback (a short evaluation and some suggestions for future improvement) on the session process and set up, as well as on IW:LEARN project *per se* as relevant.

IV. Expected Outputs (chronologically)

- Draft session plan, accompanied by guiding questions (ca. 2 pages; sample suggested below)
- Initial on-line lecture on economic valuation
- Three lecture modules on specific topics (including some guiding questions). Modules 4 and 5 optional if determined by facilitator or asked for specifically by e-forum participants.
- A minimum of 10 substantive emails to the forum during the course of the e-session. These should ask and explain relevant questions, provide relevant information material and references for “further reading” or/and answer questions on the topic which were posed by the forum participants.
- Short report (3-4 pages) covering: (i) short summary of the session dialogue; (ii) session evaluation (process, set up, project *per se*) and (iii) suggestions for future improvements based on (i) and (ii).

V. Administration

Working Period: The e-session dialogue will run from 1 September until 1 December 2005, with option for extension by one month.

The facilitator is expected to contribute up to 15 working days to this project, more or less equally distributed over the time span of the thematic e-session dialogue (as agreed upon with IUCN before execution).

Tentative timeline:

Before Sept 1 – Discuss session plan for discussions with IUCN (specific topics, key questions, fine-tune timing issues)

Sept 1 – Introduce facilitator to the e-Forum list. Provide CV and background information on session.

Sept 5 – Facilitator posts introductory on-line lecture.

Sept 5-18 (approx.) – question and answer/discussion regarding lecture.

Sept 19 – Facilitator posts first specific lecture module etc.

(follow agreed session plan timing)

Oct-Dec – Short weekly interventions, further lecture modules posted.

[Annex] Sample Session Plan for Guided Discussions (2pp. approx.):

- Week 1 – Introductory Lecture on economic valuation in a marine and transboundary context: range of topics, key generic questions to be addressed
Discussion, email reactions if any...
- Week 3 – Module 1: specific topic, key questions identified
- Week 6 – Module 2: specific topic, key questions identified
- Week 9 – Module 3: specific topic, key questions identified
- Week 12 – Module 4: tbd.
- Week 15 (in case of extension) – Module 5: tbd.
Modules to be accompanied with questions (including provocative) and answers to questions posed from the e-forum