

DISCUSSION PAPER

REGIONALISATION AND DECENTRALISATION REVIEW

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Core Team¹

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This paper is provided to stimulate discussion among staff with a view to reaching a well-informed Findings Paper on IUCN Regionalisation and Decentralisation Process. Comments should be directed to the R&D Core Team (rdcoreteam@iucn.org).

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INTRODUCTION

LAYING OUT THE PROCESS

With this paper IUCN is embarking on a new process of reviewing the concept and philosophy of Regionalisation and Decentralisation (R&D) of its Secretariat. As noted in the terms of reference for this review the aim of this process is “*to propose improvements to organizational performance of the IUCN Secretariat in order to achieve the Mission of IUCN through the delivery of an effective Programme*”. To achieve this aim the process is broken down into two major Phases.

Phase 1 (May – December 2002)

Phase 1 of the R&D Review will assist in understanding the structures and processes that we have and how they evolved, as well as understanding the evolving external environment in which we work, so that we can further strengthen the performance of the Secretariat. Phase 1 will thus deliver the following two major products:

1. The first product is this **Background Paper**, which intends to engage all IUCN staff in the review process by providing them with a common knowledge base on IUCN’s regionalisation and decentralisation process. This paper is broken down into four sections. Section 1 provides a historical description and analysis of IUCN’s regionalisation and decentralisation process; section 2 provides a synthesis on recommendations of external reviews and their outcomes; whereas section 3 looks at the changing external environment and its implications for IUCN; and finally section 4 provides a set discussion questions. It is expected that senior managers will convene discussions with their staff on this paper and provide feedback to the Core Team (rdcoreteam@iucn.org) by late November. Individual staff members will also be encouraged to provide informal feedback to the Core Team. Based on these inputs, the second product will be developed.
2. The second product is a **Discussion Paper** which intends to stimulate reflection on possible solutions and prepare for a change management plan. At that point, the process will shift from consultation to decision making, planning for change, and implementation which leads us to Phase 2.

Phase 2 (January 2003 onwards)

This Phase will focus on implementation of the recommendations and priorities identified during the Phase 1 that fall within the mandate of the Secretariat. It will therefore compliment the on-going Governance Review being undertaken by Council and will also feed into the External Review scheduled for early next year.

EXECUTIVE SUMMARY

IUCN's current Regionalization and Decentralization (R&D) Review is meant to be a pragmatic and transparent approach to change management within the Secretariat. The R&D Review starts from the premise that in order to understand where IUCN should be going, the institution needs to understand where it has come from and how it is presently constituted. The R&D Review is thus an attempt to understand the evolution of IUCN's Secretariat structures and processes, as well as the evolving external environment in which IUCN operates, in order to further strengthen the performance of the global Secretariat. By early 2003, the R&D Review will produce a series of concrete recommendations for change.

This paper is meant to empower and initiate a discussion about the results, costs and benefits of IUCN's Regionalization and Decentralization process. To do so, the paper starts with an overview of the historical process of R&D within the IUCN Secretariat. This is followed by a synthesis of the various external reviews of IUCN and an analysis of the extent to which those recommendations were or were not implemented. The paper then briefly surveys some of the key global issues affecting the larger political and economic environment in which IUCN works. Finally, the Discussion paper concludes with a few questions to stimulate discussion within the Secretariat.

Historical Overview of the Regionalization and Decentralization Process:

IUCN's R&D process can be traced back to the publication of the *World Conservation Strategy* in 1980. This seminal document affected IUCN's operations in two significant ways. First, it spanned tremendous demand for the development of national conservation strategies, and it spawned significant bilateral donor interest in funding conservation activities in developing countries. IUCN positioned itself well in this emerging marketplace and combined this demand for conservation expertise with the supply of funds. While the strategic nature of IUCN's R&D process in the 1980s remains a matter of debate, it is clear that IUCN took a strategic decision to create the Conservation for Development Centre as a mechanism to field test the ideas contained in the *World Conservation Strategy*. Where IUCN actually did the field testing, and thus where the IUCN offices sprouted up, appears to be more a matter of serendipitous combination of interests among donors, host countries and IUCN itself.

IUCN's first major attempt to rationalize the R&D process was with the development of the *Strategy of IUCN* in 1994. By that point, IUCN was already well on its way towards regionalization. In 1994 IUCN had eight statutory regions and nine regional thematic programmes, four regional offices along with 15 national offices and out of the six Commissions three of them had at least some regional structure. The *Strategy* was to a great extent a response to the concerns of IUCN's increasingly vocal Southern constituencies, which demanded the strengthening of membership ties at the regional and national level and the establishment of more efficient membership support. The document provided the justification for IUCN's most dramatic period of R&D, under David McDowell.

The *1994 Strategy* also provided the pivotal definitions for the process. *Decentralisation* is the process of devolving responsibility and authority for implementing IUCN's programmes to the Secretariat Regional and Country offices. *Regionalisation* is the process

of restructuring the Programme and delivering support to members on a regional basis, taking account of regional, social and natural heterogeneity and targeted to members' needs on the ground. World-wide, decentralization has triggered a growth of total Secretariat staff from 40 staff in 1983 to 550 staff in 1996 to around 1000 employees today out of which 100 are based in HQ. Beginning in 1986 IUCN had its first regional office in Nairobi. Only ten years later it had 8 Regional Offices and 41 country representative and project offices. In 1996 these offices were already responsible for 60% of IUCN's annual expenditure.. Today, IUCN has more than 60 offices as depicted in Figure 9 (and not 42 offices as we keep referring to).

Synthesis of the External Reviews:

Evaluating IUCN's regionalization and decentralization process is like shooting at a moving target, because there have never been a clear and accepted set of performance benchmarks. In fact, if there is one consistent criticism that unites the various external reviews of IUCN as a whole and of the Secretariat in particular, this is it. Nevertheless, a number of key issues have been raised by the various external reviews, particularly those of 1996 and 1999.

Role of the Secretariat: What has emerged from the R&D process has been for the Secretariat to take on two (primary) roles; i) that of a **Facilitator**, whereby the core function of the Secretariat has been to service and facilitate the Commissions and the Membership to implement the Programme and ii) a **Leadership** role, implementing the Programme (mostly with partners and members). However, often these roles are not carried out concurrently (either by a Component Programme, or by the Secretariat as a whole within a particular time period). The reviews also raise concern regarding the benefits apparent to the membership, and point out that *"little or no distinction is made in providing IUCN services to dues-paying membership and to local 'partners' who pay no dues."*

Funding the Secretariat: This leads to another of the core tensions of IUCN: how to pay for the value added of the organization beyond our project delivery. A key-determining factor with regards to membership services has been the availability of core funding. The 1999 external review stated that there is *"a grave imbalance between this core funding and the tasks and potential of the regions"*, pointing out, *"more core support is needed for the important work of targeting new membership, servicing members, building member capacity, supporting..."*. However, the review also points out; *"the international funding agencies are among those who strongly endorse the special qualities that the membership brings to IUCN"*. It further recommended, *"the Union reviews the structure and funding of its membership services, and develop funding proposals for enhancing these services that it can submit to funding agencies"*.

National versus Global Programming: A third tension within IUCN is the ability to balance local or national concerns with global ones, particularly in Programme development. Both the 1996 and 1999 external review supported the regionalization and decentralisation process and pointed out that it had increased the overall impact of its programme through enabling IUCN to respond to the "need to adapt to specific socio-economic and ecological concerns in different regions of the world." However, the 1999 External review also raised concerns regarding the increasing focus of IUCN from the global to the regional or national levels, and pointed out that "it is necessary to maintain the balance between a global perspective and local policies and action, and to provide mechanisms to ensure that local experiences are brought into regional and global discussions". The 1999 external review commented on the apparent lack of strategic

planning within the Secretariat, pointing out that far too little had been done in the way of assessing needs and planning accordingly. In response to the 1999 External Review and in preparations for the Amman Congress, IUCN made a major effort in drafting a new and increasingly focused programme which is structured around seven Key Result Areas.

Regions versus the Center: As with any decentralized organization, there is a challenge defining and balancing the roles of the regions with the role of the Center, so long as there remains a “center. The 1996 Review cautioned against “*decentralizing to the point that it loses its over-all programming, coordination and policy capacities at the central level,*” and raised concerns regarding the weakening of staff capacities in the technical programmes at headquarters. These concerns were later reiterated by the 1999 external review who felt that the centre had become fragmented, and recommended that “*IUCN needs to find ways in which the headquarters can recognise, strengthen and serve successful regional or country operations to which it makes only a marginal financial contributions*”. As was pointed out by the 1999 external review, “*the regions are now the central platform for the planning, programming and operation of IUCN’s activities*”. However, concerns have also been raised regarding the lack of regional policies and clear guidelines regarding specific roles and responsibilities of the different component parts within the Secretariat as a whole. From the interviews during the R&D review, it became apparent that expectations and interactions between the different components are highly dependent on individual relationships and are not necessarily based on clear definitions and understanding.

Quality Assurance and Accountability: Both the 1996 and 1999 external reviews stress the need for principles and standards to ensure a high quality of operations and outputs delivered. In addition to emphasising the need for effective monitoring and evaluation mechanisms, the 1999 external review recommends “*such standards should state clear management responsibilities, the professional level of personnel, financial transparency and accountability, timely delivery conditions, and principles for auditing and evaluation*”. Furthermore, a common issue raised by both the external reviews and internally by Secretariat staff is the emphasis and reliance on finances as the only measure of success. The 1999 external review pointed that the latter may result in “*a kind of isolation from the global Union and its headquarters in Gland*”, and recommended that “*greater recognition be given to success through global M&E, internal benchmarking, feed back systems and other learning processes that seek to spread and apply the lessons it offers*”.

The External Environment:

The purpose of this section of the discussion paper is to look at how the external environment in which IUCN operates is changing in order to identify the implications for IUCN and its Programme. The analysis breaks down into three interrelated issues: the “big picture agenda” of emerging opportunities and challenges facing conservation, how donor priorities and delivery mechanisms are shifting, and what is happening in and around IUCN’s programmatic niche.

The paper looks at the impact of globalization on the conservation agenda, focusing on four issues: trade, foreign direct investment, speculative capital investment, and changing civil society. On the trade front, the paper argues that the conservation community will continue to fight an uphill battle to get the trade regimes to take account of environmental concerns, and the fight will largely be on their turf. In looking at the impacts of foreign direct investment, the paper focuses on primary resource extraction

industries. It argues that the empowerment of local communities creates an opportunity for IUCN to fill an emerging role as a mediator and honest broker between the primary resource extraction industries, local communities and conservation interests. In looking at the conservation implications of shorter term capital flows, particularly to emerging markets rather than least developed countries, the paper suggests that capital market volatility will not be tamed any time soon. As a result, one can anticipate that there will be recurrent and unpredictable pressures on natural resources and biodiversity in the emerging market economies. Nevertheless, funding for conservation activities in emerging markets from our traditional ODA sources is increasingly difficult, and will likely become more difficult as donor attention concentrates on poverty alleviation and therefore on least developed countries. The paper suggests that IUCN should focus on developing the IUCN membership in emerging market countries, and building their capacity both politically and technically so that they can stand on their own two feet when and if the macroeconomic crunch comes. After examining the increased differentiation within civil society, the paper suggests that IUCN will have to do a better job of selling itself and its mission in the marketplace of ideas. To succeed in this, IUCN will have to build its capacity to engage with a wider range of partners in order to further its own agenda. In addition to other civil society actors, relationships with the private sector in particular need attention. Finally, the paper also briefly looks at the long term (i.e. 30 year time horizon) implications of the UNEP GEO-3 scenarios, as well as some of the implications of recent experiences with community based natural resource management and the rising importance of regional policy and technical fora.

In looking at where the donor community is going, the paper takes up four issues. The first issue is the current donor fad of poverty alleviation, and the paper suggests that IUCN should continue down its present course of engagement with the donor community to challenge the prevailing development model which is marginalizing conservation. For the regional and country offices, the logical entry points for these latter discussions would be to engage with the donor community around the emerging poverty reduction strategies at the national level. The second issue examined is the rightward shift in European governments. The paper suggests that this trend will probably make it more important to engage with our European members as aid is more likely to be tied, and it suggests that donors may shift funds towards field projects and away from policy, thus favoring field offices over HQ. The third issue considered is the trend among European donors towards a sectoral approach. Here, the paper argues that this is a significant growth opportunity for IUCN where our field offices are clever enough to position IUCN as an effective sectoral portfolio recipient, manager and implementor. Finally, the paper looks at the issue of increased competition from our government agency members as bilateral project implementors. The paper suggest that IUCN may need to more carefully distinguish between countries where government agencies have adequate capacity and a favorable civil society climate to implement conservation projects on their own. In those cases, IUCN's secretariat presence will likely have to shift to being a facilitator, convenor and provider of quality technical and policy advice.

Regarding IUCN's niche, the paper suggests that our unique value added rests in our ability to link policy and practice and our ability to link policy and science. However, to be truly effective, IUCN will have to engage with a much wider audience. We tend to spend too much time preaching to the conservation choir about biodiversity and not engaging with the broader geopolitical agendas of the day. At the moment, the world is captured by the themes of security and economic growth to the exclusion of

environment and natural resource management. The current short term, classical concerns with security, economic growth, and development are all doomed to fail in the long term so long as the world fails to grapple with the underlying causes of social dislocation and environmental degradation – in other words, the sustainable development agenda. IUCN is perhaps uniquely positioned to build alliances with our members and speak on behalf of the conservation movement as a whole and thus add value not only to our own work, but that of our members as well. This implies a far greater facilitation and advocacy role for the secretariat than has heretofore been the case. *The World Conservation Strategy* in 1980 helped to put conservation and sustainable natural resource management on the political agenda and demonstrate that it was integral to development. Today, we need to take this to the next level and demonstrate how our core agenda is integral to security and economic wellbeing.

SECTION 1:
HISTORICAL REVIEW OF IUCN SECRETARIAT'S
REGIONALISATION AND DECENTRALISATION
PROCESS

1 INTRODUCTION

In dealing with IUCN, one must always bear in mind that there never has been and undoubtedly never will be, any other human organisation even remotely resembling it. Its peculiarities, subtleties and complexities are sometimes mind-boggling. Nicholson, E.M. (1990)

It would be misleading to discuss IUCN's regionalisation and decentralisation without taking into account the organisational history and the particular way in which the field system developed. This paper attempts to summarise IUCN's Regionalisation and Decentralisation Process (R&D). Based on literature review and a number of selected interviews the paper will through a historical lens respond to the following key questions:

- i) What were the driving forces (external & internal) behind the R&D process; and
- ii) What R&D Strategies & Processes were proposed & implemented on the ground?

2 HISTORICAL SKETCH

"Continuity through crisis" is the slogan Martin Holdgate used to describe IUCN's history in his 300 page book entitled *The Green Web – A Union for World Conservation* (1999). The book provides an extensive and comprehensive review of IUCN's history and, in particular, Chapter 11 describes IUCN's regionalisation and decentralisation process, which occurred in the early 1980s and was formalised in early 1990s. *The Green Web* is fundamental to understanding the very challenges IUCN faces today. Beyond celebrating remarkable achievements, it documents IUCN's birth defects and lifelong frailties, which we must now mend to ensure better health in the 21st century. From its inception in 1948, IUCN was a house of tall ideals and mandates, built on shallow financial terrain.

In his book he divides IUCN's history in six main stages of evolution. The categorisation takes into account the external forces shaping IUCN's structure and functions. Hence we shall briefly summarise the six stages since they are helpful in understanding the Union's overall evolution in relation to its external environment.

Stage 1 (1948-1956): Before 1948 the institutional conservation landscape was primarily national with natural history societies and organisations. With the creation of the UN after the Second World War, UNESCO called for an international conference in 1948 in Fontainebleau, which established IUPN (now IUCN). It was conceived as a meeting ground, a facilitator and a supporter for these national bodies, which ultimately became the members of the Union. IUPN's *raison d'être* was not to be an operational agency but to strengthen the nature conservation movement through networking by linking

individual experts and national organisations and pooling information. The underlying assumption was that if IUPN helped to share the world's knowledge its national members would work more effectively and nature would ultimately benefit. This first period saw the Union established with a small Secretariat in Brussels initiating the first programmes and Commissions. Holdgate notes that "...IUCN was very much a European creation dominated for the first part of its existence by Belgians, British, Dutch, French and Swiss. ...Yet from the outset the organisation was looking South. It was concerned with the need for conservation in the developing world, and with supporting new and vulnerable environmental movements that were beginning in Africa, Asia and Latin America. This trend is nicely depicted in Figure 3 below which indicates the increasing proportion of developing country representatives on the IUCN Council.

Stage 2 (1954 – 1969): According to Martin Holdgate "...this was a period of strengthening science and influence. It overlapped the first stage, beginning in Copenhagen in 1954, with the election of the French biologist Roger Heim as President, gained impetus in Edinburgh two years later, when IUPN became IUCN and lasted until the late 1960s. The office moved from Brussels to Switzerland and the International Biological Programme attracted the attention of a large section of the world's ecological community. This was a stage of catalysis, in which a tiny IUCN Secretariat did what it could to promote worldwide conservation, and in which the Commissions were the spearheads of the Union's Programmes." This was a first moment of transition in that WWF grew in strength so that the power of its purse began to alter the work of IUCN. The expansion of project activities also changed the nature of relationship with the UN. Formerly based on a strong scientific relationship with UNESCO and FAO, these organisations also changed in becoming more of an "executing agency" with the establishment of UN Special Fund for Development (later UNDP), which had the mandate to finance pre-investment projects in developing countries.

Stage 3 (1970 – 1978): Following from stage 2, this period is marked with increased signs of regionalisation in which a greatly strengthened IUCN Secretariat gained the competence to manage significant field programmes as well as to support those of Commissions. Holdgate notes that "...this change from a body that was essentially scientific and a provider of expert advice to one that was operational brought its own stresses (not all of them are resolved even yet)." This change was to some extent induced by the external environment in 1970s which was marked according to Holdgate by an "outburst of popular environmentalism, stimulated by widely publicized disasters which brought along the creation of new activist green bodies such as Friends of the Earth and Greenpeace." In addition the 1972 UN Conference on Human Environment in Stockholm and the subsequent creation of UNEP increased the governments' attention on environmental issues which also led to the adoption of the CITES Convention followed by the Ramsar Convention, which were spearheaded by IUCN.

In these early days, WWF was designing and fundraising for the projects which were ultimately implemented by IUCN. Under this scheme IUCN established its first field office in 1977 with WWF funding to assist the government of Indonesia in establishing a national system for protected areas. This was a period of growth. From a Secretariat staff of 17 people and an annual budget of USD 350'000 in 1970 it grew to approximately 30-40 staff and an annual budget of USD 3.5 million in 1976. By 1988, WWF had injected SFR 43 million into IUCN's core and programme activities. Nonetheless, in the late 1970s IUCN was still small and centralised and a prime function was to support the work of its Commissions. This will change drastically as described in Stage 4.

Stage 4 (1978 – 1984): Holdgate terms this as the era of conservation strategies which was also marked by the inclusion of development aspects in previously purely conservation activities. This also led to a much closer cooperation with the UN agencies. He goes on in noting that “...its high point was the launch of the World Conservation Strategy (WCS) in 1980, in which IUCN jointly with WWF and UNEP for the first time spelled out the concept of sustainable development.

The launch of WCS led to a large demand from governments for National Conservation Strategies. As a response IUCN established the Conservation for Development Programme with a grant from the Ford Foundation amounting to USD 250'000. In these days, IUCN had hardly any relationships with the bilateral aid agencies to attract additional funding. It was still perceived as a conservation organisation only interested in the safeguard of species and protected areas and not in larger development issues.

Given the little interaction IUCN had with bilateral aid agencies it was decided to change the Conservation for Development Programme to the Conservation for Development Centre (CDC) which was semi-detached from IUCN. The thinking was that in not being integral part of IUCN it would have more potential in attracting ODA funding. Interestingly aid agencies were also regionalising and in only four years the CDC multiplied its budget by ten and by 1986 it had approximately 100 staff. The prime objective of CDC was to establish a network of field projects which would assist in operationalising IUCN's scientific and policy know-how. However the downside of CDC was that it was never fully integrated with IUCN.

Reflection on CDCs role in R&D

In the early 1980s we did not have the funding base nor the mandate to develop a great R&D organizational structure. In fact CDC was established as a network of projects and thereby operationalising IUCN's scientific and policy know how. It was never an attempt to regionalize IUCN. The approach was to skim off as much overheads from projects to fund the service and organizational structure of IUCN. In sum, it was about increasing funding at the centre by developing links to the donors – a very pragmatic and realistic approach to opportunism.

*Interview Respondent,
R&D review 2002.*

Stage 5 (1984 – 1994): Following the 1984 General Assembly in Madrid was a period of rapid expansion with development aid agencies increasingly supporting IUCN's project work in the field through the Conservation for Development Centre.

Nevertheless, in these days WWF was still managing IUCN's finance and HR – through what was known as the Joint Service Department. However, with no control on finance and HR, IUCN was navigating in the dark with no clear idea of its financial situation and in 1986 it discovered that it had a deficit of SFR 2 million. The solution for salvaging IUCN was to integrate the successful CDC fully

Four primary causes for IUCN's malaise

- Lack of team spirit and corporate identity;
- Uneven professional output and opportunity;
- Lack of a coherent organisational structure;
- Lack of resources (partly aggravated by deficiencies in the way we use the ones we have got).

Six months of Glandular Fever: A personal note by Martin Holdgate; 24 Oct. 1988

into IUCN as the Field Operations Department. It was only then that IUCN was a truly independent organization again. In 1987 it had re-established its own Finance and HR System which also provided administrative structures and procedures for its field

operations. From the SFR 9 million in 1983, IUCN was now managing an annual budget of SFR 55 million in 1993.

In addition, around 1984, IUCN's programme started to evolve around a series of thematic programmes (forests, wetlands, marine, species, parks etc.). Through the Field Operations Department, IUCN had also taken deliberate steps to established regional and national offices. The result was a series of programmes that overlapped in terms of substantive activities, skills of staff and expenditure.

The buzzwords were vertical and horizontal integration which attempted to solve this issue through the establishment of (1) Natural Resources Group (Parks, Species, Wetlands, Biodiversity, Forests, Marine); (2) Social and Institutional Support Group (Population and Environment, Community Supports, Strategies, Environmental Assessment; Environmental Law, Education, Environmental Economics, Monitoring and Evaluation; and (3) a Regional Support Group which had a representative for Asia, Africa and Latin America at HQ with the task to catalyse and facilitate institutional regionalisation and decentralisation and the formulation of regional strategies for IUCN.

Externally, with the Earth Summit in Rio de Janeiro in 1992 it led to a reawakening of interest in the fate of the genes, species and ecosystems of the world leading to several conventions to which IUCN has contributed (eg. CBD, FCCC, CCD). To some extent this also led to the renewal of IUCN's work at the policy level.

Stage 6 (1994 – 1999): This period could be extended to today given that it remains a period in which IUCN grapples with its regionalisation process due to its dramatic expansion in the 1980s and early 1990s and the inevitable consequences of Rio with its emphasis on new national action for sustainable development at local and global levels. Although initial discussions on decentralisation and regionalisation

began in 1984 the debate increasingly became more structured as of 1988 with a request to the Director General at the Costa Rica General Assembly to examine all structural components of the Union, "with a view to providing the most effective framework for overall operation" (Resolution 17/4).

This led to the development of the *1994 Strategy of IUCN* which was the first concrete proposal addressing IUCN's Regionalisation and Decentralisation Process. The *Strategy* was adopted at the General Assembly in Buenos Aires in 1994. This decision was to a great extent a product of the identified need to strengthen membership ties at the regional and national level and to establish more efficient forms of support to that membership. As Holdgate puts it, "...*Buenos Aires gave IUCN back to its members. The centre of gravity of the Union moved decisively southwards.*" Internally, it led to a downsizing of staff and resources at the centre including the abolishment of the regional support group at HQ in the late 1990s.

Montreal 1996 Commitments

In 1996 at The World Conservation Congress in Montreal, David McDowell noted four areas of improvement for the Union: to become more focused; to get its message out more effectively; to be more innovative in mobilizing human and financial resources; and to serve the members and networks better.

3 FOCUSING ON R&D STRATEGIES AND PROCESSES

Whereas the previous section attempted to provide a brief historical overview of the external and internal forces which drove the Regionalisation and Decentralisation process over the last 50 years, this section aims at describing in more detail the R&D Strategies and Processes which were proposed over the last decade and those which were ultimately implemented. According to various interviewees the documents written in the last decade were a post-hoc rationalisation of the regionalisation and decentralisation process which in fact took place in the 1980s.

The **1994 Strategy** provides the starting point and benchmark for reviewing IUCN's R&D Process. The Strategic Plan notes that the terms regionalisation and decentralisation have tended to be used inconsistently or interchangeably in IUCN and thus proposes the following definition which still remains our benchmark for assessing the R&D process:

- *Decentralisation* is the process of devolving responsibility and authority for implementing IUCN's programmes to the Secretariat Regional and Country offices;
- *Regionalisation* is the process of restructuring the Programme and delivering support to members on a regional basis, taking account of regional, social and natural heterogeneity and targeted to members' needs on the ground. (which ultimately takes account of major differences that exist between regions, and thus provides flexibility to meet these needs through differing organisational structures.

The document further states that *"the aim of regionalisation is to build a strong, worldwide Union. But the process must avoid fragmentation, for it is only as unified entity that IUCN can realise its potential to influence developments at global level.* It then goes on to define that the regionalisation process must meet the following four needs:

1. it must make the members stronger and more effective as institutions in the front line of conservation and in ensuring that any resource use is ecologically sustainable;
2. it must ensure efficient contact and information flow between the membership, Commission members, the Secretariat and key partner organisations;
3. it must create forums for the members to discuss key conservation issues in the regions as a basis for programme development;
4. it must strengthen the involvement of the members and communities and partner organisation and institutions in decision taking and in programme implementation.

Some strategic issues and objectives were also defined by the Plan, such as the need to increase the involvement of members in defining key issues to be addressed in the Programme of the Union, as well as foster cooperation with its members and partners so as to enable them to implement their individual missions and that of IUCN more effectively, with the overall strategic objective of making the Union a genuinely global

organisation, driven by its members as key constituents and as increasingly powerful agents in achieving its mission.

The Plan also noted that the decentralisation and regionalisation of the Secretariat was a continuing process (of change management), and was the principal means by which the Union was able to function within a regional framework. In fact it goes as far as to state the process could be transitional in that as member institutions became stronger in a specific region the role of the Secretariat would change to concentrate more on networking and communication.

In conclusion the R&D section of the Plan calls on the Council, advised by the DG and in consultation with the membership, to undertake a critical review of the national links and regional units in IUCN and make proposals for any necessary changes to the next General Assembly in 1996 in Montreal.

In June 1994 the Director General establishes a ***Taskforce on Regionalisation and Decentralisation***, which issued its first report in August 1994. The report challenges the Strategic Plan by noting that the plan does not state the underlying rationale for regionalisation and decentralisation – Why regionalise? Why decentralise? In fact, the taskforce notes that IUCN is already decentralised and regionalised. In 1994, IUCN had eight statutory regions and nine regional thematic programmes, four regional offices along with 15 national offices and out of the six Commissions three of them had at least some regional structure. Nonetheless, they argue that a primary rationale for a continuous R&D process is necessary for the following reason:

“...the increasing global impact of local events and processes and the unprecedented challenges human society faces in a rapidly evolving social, economic and environmental context that differs subtly from region to region and country to country. In this dynamic environment IUCN needs to reach out to and understand these changes as they happen, and to feed this information back into the design of its programme, of its structures and of its procedures. Global conservation policy in particular needs to be based upon an understanding of changes on the ground, while national actions need to be aware of supporting the role of evolving global policy”.

Based on the above, the report suggests a new definition for R&D:

- *regionalisation* is redefined as the process of structuring the work of the Union within a regional framework that takes account of regional heterogeneity and targets members’ needs on the ground; and
- *decentralisation* is redefined as the process of devolving greater responsibility for the preparation and implementation of the Programme of the Union to RCOs and, where possible, to the regional and national structures of the membership and Commissions. So defined, decentralisation consists of three separate but linked processes – the physical decentralisation of the Secretariat, the delegation of authority and the devolution of responsibility.

The tension within IUCN is that HQ thinks about decentralisation (dispersing Secretariat location) while the RCOs think about devolution (dispersing authority).

*Interview Respondent,
R&D review 2002.*

The report also carries out a comparative analysis of IUCN structures in relation to areas of high biodiversity richness, environmental risk and socio-political criteria including population increase, consumption patterns and international influence in specific regions. The following two world maps graphically compare IUCN's presences related to biodiversity endemism areas based on the information collected by the taskforce in 1994 with a 2002 world map of IUCN's presence related to WWF's ecoregions.

Figure 1: IUCN's presence compared to areas of biodiversity endemism in 1994

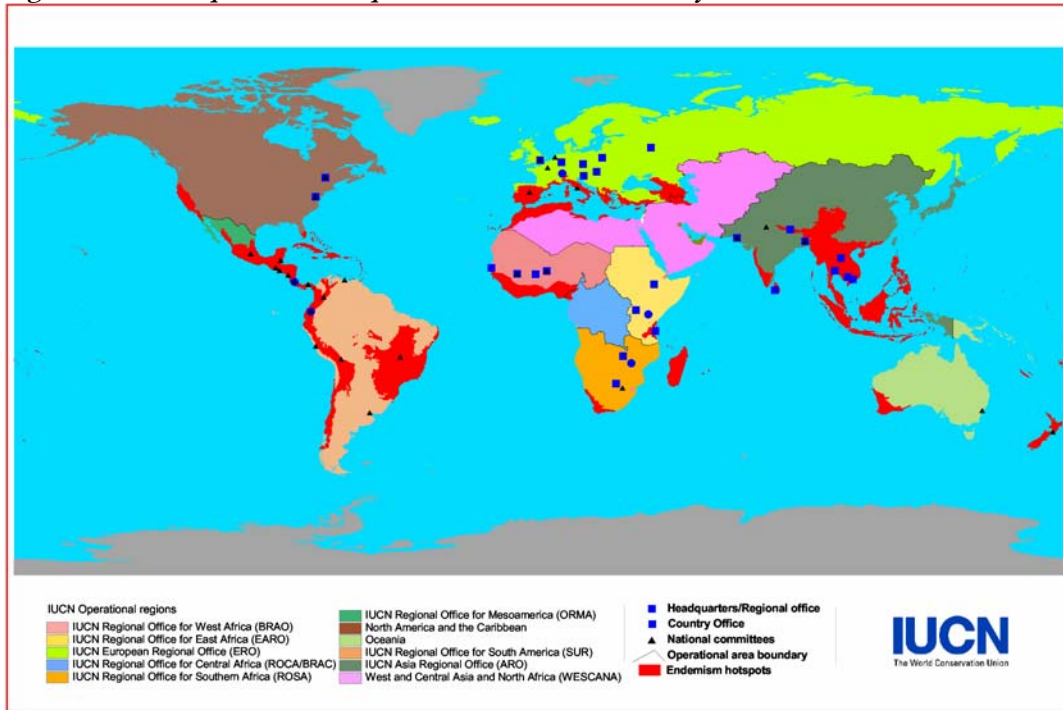
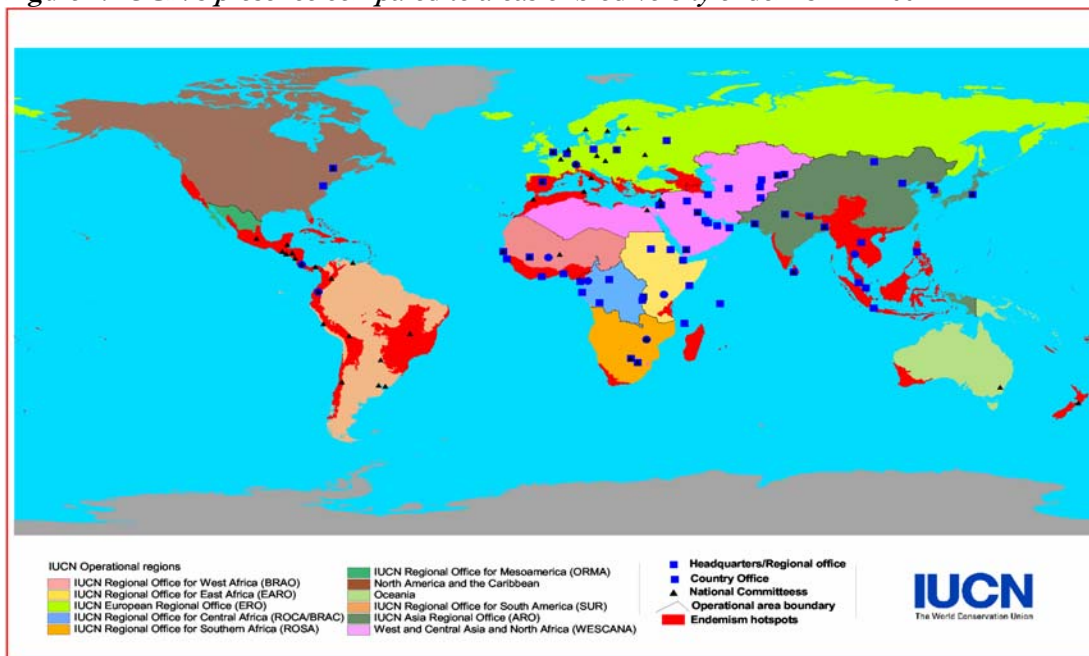


Figure 2: IUCN's presence compared to areas of biodiversity endemism in 2002



The final conclusion of the 1994 taskforce is that integration will depend more on the development of a new mindset among key staff than on the development of specific mechanisms.

Following the report of the taskforce, the Director General initiated a series of actions to develop mechanisms for furthering the process of regionalisation and decentralisation. Primarily this was done through groups of analysis with representatives from all parts of the Secretariat. The outcome of this reflection effort was a paper entitled ***Time to Choose*** which provides a set of operational decisions to redesign and restructure the Secretariat. The paper analyses the situation of each region and determines what changes are needed and defines the new relations in sharing of responsibilities between HQ and RCOs with regard to the development of programmes and their impact on the budget.

It is only in 1996, that an ***External Review 1994-1996*** provides a more critical overview on IUCN's regionalisation and decentralisation process. The recommendations of this review are described in more detail in section 2 of this paper.

In September 1997 the DG issued a paper entitled ***Lifting the Union's Game*** in which he expresses his views on what remains to be done to fulfil the IUCN Mission more comprehensively and to bring greater coherence to the Union's Programme and policies. In his view there remained too many ambiguities about the Union's main business and about what it stands for and is trying to achieve. A major concern was horizontal and vertical integration of the components of the Secretariat and his realisation that decentralisation will perversely also require some strengthening of crucial functions in the centre.

In May 1997, the DG issued an ***IUCN Policy on Responsibilities and Authorities of RCO Heads***. The policy describes the responsibilities of both RCO heads and headquarters units in the areas of finance, human resources, establishment and closing of offices, programme development and management and audit and review. It is difficult to assess to which extent the policy was implemented. In any event with the arrival of a new DG in 1999 a new policy on delegation of authorities is issued which increases the oversight role of the centre.

In 1998, the Compass Report provided a last attempt to get to grips with IUCN's Regionalisation and Decentralisation Process. The report provides a sound analysis however it does neither provide conclusions nor recommendations with regard to addressing the challenges it identifies. With the arrival of a new DG in 1999, the report was shelved since she decided that regionalisation and decentralisation was completed for IUCN. Nevertheless in her report to the 2000 World Conservation Congress in Amman she noted: *...and yet, the distribution of our presence is not as strategic as it needs to become. We seek better geographical calibration of our programmes and Secretariat outreach, especially to strengthen IUCN's contributions in some countries of high significance for world conservation, such as Brazil, China, India, Indonesia, Russia, and Nigeria.* She goes on by stating that: *"...over the last decade of rapid decentralization and regionalization, IUCN has paid insufficient attention to development and maintenance of the institutional systems necessary to ensure quality, accountability and good governance."*

4 CONCLUDING REMARKS

As described in this section, IUCN has grown as a function of historical ties and the thrust of aid programmes. Its defining moments have also been the development of overarching strategies, such as the *World Conservation Strategies* in 1980 followed by *Caring for the Earth* and the Global Biodiversity Strategy as the first blueprint for integrated global action to save the world's plant and animal life.

IUCN today has matured into a truly global – globally present – institution. With presence in 181 countries, IUCN's network reaches almost all points of the globe, promoting conservation of the integrity of ecosystems and biological diversity, and the sustainable use of natural resources. With more than 950 member organizations worldwide, IUCN is in a privileged position to learn about problems and issues in real time, as they emerge. Worldwide, decentralization has triggered a growth of total Secretariat staff from 40 staff in 1983 to 550 staff in 1996 to around 1000 employees today out of which 100 are based in HQ. Beginning in 1986 IUCN had its first regional office in Nairobi. Only ten years later it had 8 Regional Offices and 41 country representative and project offices. In 1996 these offices were already responsible for 60% of IUCN's annual expenditure. Figures 5, 6 and 7 provide an overview of IUCN's expenditures by region.

There has also been substantial growth in financial terms - our annual total expenditures increased from some SFr 9 million in 1983 to SFr 56m in 1995 and to SFr 91m in 1999. A 22% growth in our project portfolio during 1999 could be perceived as a financial vote of "customer confidence". Our financial troubles are thus not associated with the overall size of our operations, but with the funding structure: core funds to support our network – the true "value added" of IUCN as an institution – have been most difficult to obtain. Consequently, a fast growing project portfolio was the way to keep the institution alive, but also, on the down side, the way to dilute its focus and, in some cases, quality. In addition, this large decentralised structure is supported by a very low level of reserves amounting to SFr 6.4m or a mere 6% of total expenditures, estimated at SFr 100m in 2000.

Turning to IUCN's programme it is often said that it tended to be an assimilation of individual thematic and regional activities. Nevertheless, in the early 1990s, IUCN's Programme already had a structure which resembles our current Programme. It had three-overriding outputs – UNDERSTAND (State of species ecosystems monitored and assessed); CONVINCING (Policies and guidelines on sustainable use of natural resources and biodiversity conservation developed and advocated); and IMPLEMENT (Strategies and practices for conservation, sustainable use and management of natural resources promoted and assisted). Under each of these outputs it had approximately 5 key activities to which each "component programme" contributed and reported.

Several of our interviewees also noted that the current IUCN Statutes are counter-productive to IUCN's regionalised Secretariat structure. They argue that the current Statutes put the entire responsibility for managing the Secretariat with the DG and there are no clear roles and responsibilities defined in the Statutes for Regional Directors. In addition, several individuals noted that the statutory regions do not overlap with the

Secretariat regions and this has created governance problems in that it makes it more difficult for members to use regional structures to inform the IUCN Programme.

Has there been a pattern for regionalisation and decentralisation? According to David McDowell, while the character and role of regional and country offices differs there has been a general pattern in the evolution of these offices:

- from mainly representational and advisory role to an increasing focus on development of member and partner relations, and increased member input and involvement in programme development and implementation;
- from single-sector projects to more integrated projects and overall regional/country programmes and technical network development;
- from reliance on HQ guidance and support, to greater local technical and managerial capacities;
- from the need for investment to substantial financial resources from unrestricted/general programme funds, to a substantial level of self-sufficiency based on project and regionally raised programme income.

SECTION II
SYNTHESIS OF PERFORMANCE ISSUES RELATED
TO REGIONALIZATION AND
DECENTRALIZATION

To get a sense of how well IUCN has operated in a regionalized and decentralized fashion over the past decades and how accurate the initial assumptions of R&D were in practice, the Review Team looked at five sources of performance oriented documentation:

1. Three major External Reviews of IUCN²
2. Five Strategic Reviews of Regional Offices and one Review of a Country Office, 2001³
3. The Compass Study, 1998
4. The Report of the Bangkok meeting of Regional Directors, April 2002

Of particular interest is references to performance issues that relate to the initial assumptions of R&D as outlined in the reconstructed R&D model in Section 1, and to issues and problems encountered in operating in a regionalized and decentralized fashion.

The following syntheses focuses in particular on those issues and problems that seem to reoccur or have not been adequately addressed to support effective regionalization and decentralization. For the full list of issues covered in the reviews, please refer to the Review reports listed in the references.

Reading across each performance area, the synthesis (Annex 1) indicates that there are common issues that have reoccurred in Reviews and studies. In some cases it appears that the nature of these issues change over time as R&D develops in IUCN. In other cases the synthesis indicates that some issues have either not been adequately addressed or addressed at all, and have reappeared again in recent reviews and in the Bangkok Regional Directors meeting.

The major performance issues fall into the following categories:

1. Progress made in Regionalizing and Decentralizing
2. Programme Development and Implementation
3. Membership Development and Services
4. Financial Viability and Security
5. Operational Systems and Capacities
6. Management, Leadership and Vision
7. Policy Development
8. Quality Control, Monitoring, Evaluation and Learning
9. Commissions
10. Governance

² The External Reviews of the IUCN Programme - 1991-1993 and 1994-1996, Leif Chirstoffersen, Team Leader, and 1996-1999, Gabor Bruzt, Team Leader.

³ Strategic Reviews of - the IUCN Canada Office, the IUCN European Office, the IUCN CIS Office, the IUCN South America Office, the IUCN West Africa Office and the IUCN Pakistan Country Office.

5 PROGRESS IN REGIONALIZING AND DECENTRALIZING

While the reviews recognised progress in the physical establishment of offices at regional and country levels and the shift to programmatic thinking, they continued to stress the need for a strategy for regionalization and decentralisation, and raised considerable concern regarding the apparent ad-hoc approach and lack of a clear understanding of the objectives or milestones to be met.

The 1991 External Review highlighted the need for a more systematic approach to regionalization and decentralization, and this was reiterated again by the Buenos Aires assembly in 1994 which also warned against fragmentation and emphasised the need for IUCN to grow as a unified entity in order to fully realise its potential. The Compass Study and the 1999 Review highlighted the urgent need to redefine the role of the centre in supporting a regionalized and decentralized Union.

Key issues raised in the reviews included:

- Need for a strategic approach, particularly in planning to identify the needs of target sectors and the most appropriate and cost effective means of meeting those needs (Compass Report; 1991 & 1999 External Reviews; Bangkok Meeting)
- Lack of clarity in rational, mandate and purpose of the different components of the Secretariat (Compass Report; 1996 & 1999 External Reviews; Strategic Reviews; Bangkok Meeting)
- The importance of a strong centre to support tasks undertaken in the regions, link experiences across and carry them forward into the global arena, as well as to ensure overall quality control (Compass Report; 1996 & 1999 External Reviews)
- The need to strengthen linkages between the different components of the Secretariat through better communication and coordination (1996 & 1999 External Reviews; Strategic Reviews).

5.1 Current status of Measures taken

A regular cycle of strategic reviews (regional and global) has been established to focus on the mandate and scope, as well as the performance and financial viability of selected offices. The R&D review currently underway is expected to articulate and clarify the current rationale and strategy for R&D, including further clarification on the role of the centre in supporting R&D. The Intersessional Programme framework adopted at the Amman Congress has provided a common framework for all parts of the Secretariat to work together towards a common set of Key Results.

6 PROGRAMME DEVELOPMENT AND IMPLEMENTATION

Early reviews raised concern about the structure and coherence of the overall programming process, and specific recommendations were put forward by the 1999 External Review. In addition to the overall programme framework, issues raised by the reviews included the following:

- The need to strengthen the capacity for capturing lessons learnt through experiences gained in the field and by others through more effective interaction between different components of the Secretariat and other institutions (1993 & 1996 External Reviews; Bangkok Meeting)
- The need to ensure close collaboration between global programmes and the region, and to develop programmes in response to needs of regions, members and other partners (1993, 1996 & 1999 External Reviews; Strategic Reviews)
- The need to maintain a balance between global perspectives and local priorities (Compass Report; 1993 External Review)
- Inadequate capacity in economic and social analysis, and gender programming (1993 External Review)
- The importance of scientific expertise to give authority to policy positions and ensure technical quality of programme delivery (1993 & 1999 External Reviews)
- The need to demonstrate the linkages between conservation and development at the field (1993 & 1999 External Reviews)
- The need to ensure that budgetary allocations are made on a basis of programmatic priorities (1999 External Review)
- The need to measure success on more than just budgetary performance, and take into account the effective spreading and application of lessons learnt (1999 External Review)

6.1 Current status of Measures taken

The current Intersessional Programme framework has addressed issues of coherence and focus, and the Programme is widely accepted to be a major improvement, as confirmed by the Bangkok Regional Directors meeting. The Strategic Reviews point to a continuing weakness in regional capacities for planning and programming, and issues related to inadequate capacity in economic and social analysis have not yet been adequately addressed, although efforts are currently underway.

7 MEMBERSHIP DEVELOPMENT AND SERVICES

An important part of the 1994 Buenos Aires rationale for decentralisation and regionalization was to establish closer linkages with members and partners on the ground in order to better target their needs and strengthen their involvement in decision taking and programme implementation. The 1996 World Congress gave further endorsement to the process, while renewing the call for it to achieve stronger member participation.

The reviews reported that the involvement of the membership varied from region to region, and the Compass Report raised concerns regarding the tension and uncertainty in the Secretariat regarding what is actually means to service the membership.

Specific issues raised by the reviews include:

- The lack of tangible benefits to members, given that there is little apparent difference in the services provided to members paying dues and partners who do not (1993 &

- 1996 External Reviews).
- In relation to the latter, the 1996 review also warned against raising the expectations of its membership to unrealistic levels, which was reiterated by the Compass Report and Strategic Reviews, that also pointed out that members should only receive support for activities that fall within the scope of IUCN's agreed mission and programme.
 - The lack of adequate core funding and investment to enable the provision of membership services and the building of the IUCN constituency (1999 External Review)
 - The dangers of competing with the membership for donor funding (1999 External Review).

8 FINANCIAL VIABILITY AND SECURITY

In 1993, the External Review expressed concerns for IUCN's financial base, given the growing interest in global environment issues and the increasing competition from other environmental institutions at the time, and recommended exploring the possibilities for increased programmatic funding through stronger field presence. In 1996 and 1999, the External Reviews shared this view and the 1999 review reported given that increasingly donors were also regionalizing, it would be of interest to both to establish more direct links between the donors and the regional programmes.

The reviews also pointed out needs for

- Effective funding strategies that rely less on project support and increase the availability of programmatic funding (1993, 1996 & 1999 External Reviews; Strategic Reviews)
- Improving cost control systems to ensure that management and administrative operations are cost effective (1996 & 1999 External Reviews)

8.1 Current status of Measures taken

From 2000 onwards, funding (core and project) has stabilised and some donor diversification has been achieved. Additionally, the following measures are being taken:

- Risk management and reserve policies have been established.
- Liquidity situation is being monitored closely, including projects cash flow deficits,
- Project fund raising is monitored closely for actual versus planned, size, maturity, location.
- Cost recovery policy is under review.
- Fundraising guidelines have been issued.

9 OPERATIONAL SYSTEMS AND CAPACITIES

The majority of operational issues identified over time are concerned with issues related to human resource management.

Specific issues raised by the reviews included:

- The inadequate standardisation of employment contracts and equal pay standards (1999 External Review; Bangkok Meeting)
- The balance of representation of nationalities of staff both at headquarters and within the regional offices (1993 & 1999 External Reviews)
- Inadequate gender balance at middle and higher levels (1993 & 1999 External Reviews)
- The need to strengthen human resource capacities to enable stronger and clearer setting of standards and processes. (Compass Report, 1998)

9.1 Current status of Measures taken

Current actions being taken by the Human Resources Unit of HQ include –

- The IUCN Secretariat Staff Rules are being revised by the HQ Human Resources Unit, in consultation with the regions.
- A clear set of human resources policies to be adhered to globally will be presented to Council in 2003
- Accompanying the policies will be procedural guidelines, to be adapted by each of the regional offices to suit local requirements.
- The performance appraisal process within the Secretariat has been refined and appraisals are now carried out on a quarterly basis, using separate forms for managers and for staff.

10 MANAGEMENT, LEADERSHIP AND VISION

Management issues became prominent in Reviews in 1996-1999 - the need for vision, leadership and business planning, and for improved management mechanisms to support regional programmes. The Compass Report reported the increased role played by Regional Directors in strategic management as a positive development, but pointed out the need for a clear understanding of the implications on Regional Directors time, which needs to be divided between global and regional responsibilities. Inadequate management capacity was also highlighted in both the 1999 Review and reinforced by the Strategic Reviews and the Bangkok meeting.

10.1 Current Status of Measures taken

Upon his arrival in 2001, Achim Steiner, IUCN's current Director General, clarified the senior management structure (Executive Management Group and broader management group), the lines of reporting, and the delegation of authority. An updated strategic vision for IUCN for the next Intersessional period is being developed following the WSSD. Issues and concerns remain regarding the lack of capacity and skills in performance management across the Secretariat.

11 POLICY DEVELOPMENT

The few references there are in the Reviews to policy development are concerned with weaknesses in the links between policy and field activities. The External Reviews highlighted the need to ensure that policy activities involve regional and country offices in order to make policy formulation relevant to local conditions and to ensure that policies are based on lessons and experiences gained throughout the world (1993, 1996 & 1999 External Reviews; Bangkok meeting). The Strategic Reviews also reported weak policy development skills and capacities in some regional offices.

11.1 Current status of Measures taken

The IUCN Policy System has recently been redesigned and approved by Council.

12 QUALITY CONTROL, MONITORING, EVALUATION AND LEARNING

The need for principles and standards to support a high quality of programme and project delivery has been a recurring theme since the 1991 Review which pointed out the need for a comprehensive monitoring and evaluation system to track progress and measure results in all projects and programmes within IUCN. The Compass Study and 1999 External Review noted significant progress in the establishment of an IUCN specific M&E process, but continued to urge for improved capacity at regional and global levels to monitor, evaluate and capture learning.

12.1 Current status of Measures taken

An IUCN Evaluation Policy and standards have been adopted by the IUCN Council, setting out the criteria, standards and principles to be followed in evaluation of IUCN project, programmes and organizational units. Capacity building and coaching in PM&E is ongoing at regional and global level, however learning processes and quality control are still found to be uneven and weak in many parts of the Secretariat.

13 COMMISSIONS

Concerns regarding the role of the Commissions were raised as far back as 1991, when the External Review emphasised the need to ensure high international quality of the work carried out by the Commissions and their involvement in the process of R&D. The 1996 External Review reiterated the need for the enhancement of opportunities for funding of the work of the Commissions through close collaboration with regional programmes, as well as headquarters. Later, the 1999 External Review emphasized the special role of the Commissions as one of the three pillars that gives IUCN its distinctive character as a science based institution.

Other issues raised by the Reviews include the following;

- A high level of ignorance within the Secretariat regarding the Commissions and the need for improved interaction and use (Compass Report; 1996 & 1999 External Reviews)
- The implications of the voluntary nature of the Commissions, in terms of limitations in time and resources, given that programmes require systematic and timely inputs of scientific knowledge and skill (Compass Report; 1999 External Review)
- The need to adopt an interdisciplinary approach to the delivery of Commissions knowledge to IUCN programmes and projects (1999 External Review)
- The need to inform donors of the Commissions to broaden opportunities for use as expert inputs to IUCN programmes and projects (1999 External Review)

14 GOVERNANCE

The major governance issues raised that are of significance to the R&D review are:

- The need to clarify and understand the relationship and boundaries of authority between Councillors and the Secretariat, and the implications of the latter for the role of the Director General (Compass Report);
- The need to strengthen regional governance bodies. (External Review, 1999)

14.1 Current status of measures taken:

The Governance Task force is currently examining issues related to regional governance, and recommendations will be submitted to Council in late 2002 or early 2003 after consultation with the membership.

The table that follows displays the evolution of performance issues by category from 1991 to 2002. It sets out the evolution of performance issues in 10 major areas, as found in the 6 sources of information presented above. (Reviews 1993, 1996, 1999, Strategic Reviews 2001, Compass Study 1998, and the Bangkok Regional Directors meeting 2002)

This synthesis provides the reader the ability to see the evolution and nature of these issues over time, in order to begin to draw conclusions concerning IUCN's performance as a decentralized and regionalized organization –what issues reoccur, what has been addressed satisfactorily, and what issues are outstanding that need to be addressed now.

The interviews and staff discussions that follow this paper will seek to confirm in a systematic manner those performance issues that are still outstanding and that need to be addressed in order for IUCN to operate effectively and efficiently as regionalized and decentralized organization.

TABLE ONE: EVOLUTION OF PERFORMANCE ISSUES 1991-2002

Performance area / issue	1. Review 1991-1993	2. Review 1994-1996	3. Review 1996-1999	4. Strategic Reviews 2001	5. Compass Study 1998	6. Bangkok Regional Director meeting 2002	Current Status of Measures Taken
1. Progress in Regionalizing and Decentralizing the Secretariat	<ul style="list-style-type: none"> ➢ Recognized progress in R&D, however, need policy & guidelines for R&D ➢ Address ad hoc nature of offices ➢ Guard against fragmentation ➢ Move to bilateral regional arrangements, programme funding and activities 		<ul style="list-style-type: none"> ➢ Redefine the role of the centre ➢ Redefine power relationships between the regions and centre 	<ul style="list-style-type: none"> ➢ Weak inter office coordination ➢ Lack of clarity between and among some regional offices with overlapping statutory boundaries ➢ Poor or weak integration with global programmes and Commissions. 	<ul style="list-style-type: none"> ➢ No clear strategy for regionalization setting out roles, responsibilities and accountabilities – need a strategy, criteria, specify stages of R&D, define role of management, and a plan with milestones. 	<ul style="list-style-type: none"> ➢ Clarify the role and responsibilities of outposted offices, the role of IUCN in northern countries, the role of HQ in a decentralized Union. ➢ Explore the niche that IUCN regions and country offices can identify ➢ Strategy needed for priority areas where the Sect should be present, and strategy and criteria for new and existing country and regional offices. ➢ Division of responsibilities between HQ, regions and country offices 	<ul style="list-style-type: none"> ➢ R&D Review under way, rationale and strategy for R&D will be approved including clarity of the centre in R&D. In progress; ➢ Oceania regional office ➢ WESCANA unit ➢ US mandate, role to be reviewed
2. Programme Development and Implementation	<ul style="list-style-type: none"> ➢ Link conservation and development ➢ Improve project planning, programming approaches ➢ Improve project identification and evaluation ➢ Improve capacity for economics and social analysis ➢ Improve capacity for gender related work 	<ul style="list-style-type: none"> ➢ Weak links between regional programmes and technical global programmes ➢ Fragmentation of HQ units and programmes ➢ More focus needed for programme, more bottom up programming, learning and evaluation needed. ➢ Some regions – lack of coherent regional work programme. 	<ul style="list-style-type: none"> ➢ Inadequate focus and framework for Programme ➢ Failure to adequately address lack of capacity for economic and social analysis ➢ Poor coordination and links between global and regional programmes ➢ Fragmentation of the Sect programmes ➢ Improve mentoring and accessing knowledge, capturing lessons at all levels. 	<ul style="list-style-type: none"> ➢ Limited capacities for project and programme planning ➢ Need to involve members more in programme delivery 	<ul style="list-style-type: none"> ➢ Fragmentation of programme, processes and behaviours as a result of regionalization 	<ul style="list-style-type: none"> ➢ Guidance needed on how to best engage global and programme programmes more effectively ➢ Examine the impact of decentralization on the focus and strategy of the programme ➢ Assess the extent to which the lack of strategy has affected the quality of delivery in the Programme. 	<ul style="list-style-type: none"> ➢ Coherent Programme framework developed and approved by Commission ➢ Planning and programming support team in place ➢ Training underway ➢ Project screening process in place in XX region HQ. ➢ Skills and capacities limited ➢ Quality of programme delivery overall
3. Policy development		<ul style="list-style-type: none"> ➢ Inadequate links between policy work and field activities. 		<ul style="list-style-type: none"> ➢ Weak policy development skills and capacities, and little assistance from HQ in this regard 			<ul style="list-style-type: none"> ➢ Policy system reviewed and approved by Commission ➢ Policy development regionally uneven and fragmented ➢ Policy – practical application uneven and often delayed
4. Quality control, monitoring, evaluation and learning	<ul style="list-style-type: none"> ➢ Need to monitor and evaluate progress 	<ul style="list-style-type: none"> ➢ Weak learning processes 	<ul style="list-style-type: none"> ➢ Large gap between IUCN's global principles and progress in the field ➢ Need for quality assurance ➢ Address uneven regional performance ➢ Improve monitoring and evaluation skills, capacities and system at regional and global levels. 	<ul style="list-style-type: none"> ➢ Need for increased monitoring and evaluation and training. 	<ul style="list-style-type: none"> ➢ Reporting formats and monitoring cycles do not meet operational needs, nor are they strategic or cumulative. 	<ul style="list-style-type: none"> ➢ Maintain stature and reputation. ➢ Improve knowledge synthesis and innovation ➢ Develop mechanisms, strategies to better synthesis lessons and experience across the Union. 	<ul style="list-style-type: none"> ➢ Evaluation policy approved ➢ Regular cycle of regional and global reviews ➢ Evaluation training and capacity building ➢ Learning processes capturing lessons ➢ quality control processes uneven, still weak

Performance area / issue	1. Review 1991-1993	2. Review 1994-1996	3. Review 1996-1999	4. Strategic Reviews 2001	5. Compass Study 1998	6. Bangkok Regional Director meeting 2002	Current Status of Measures Taken
5. Management			<ul style="list-style-type: none"> ➤ Need for vision, leadership, managing growth, business planning, ➤ Inadequate management. Mechanisms to support regional programmes. ➤ Lack of management capacity in some regions. ➤ Restructure and limit the number of budgetary units. 	<ul style="list-style-type: none"> ➤ Weak leadership and vision ➤ Lack of clear mandate, purpose and rationale of some regional offices ➤ Inadequate management skills and systems 		<ul style="list-style-type: none"> ➤ Ensure coherence of the parts of the Union (Sect, Commissions, regions, members) ➤ Concern about efficiency of management services ➤ Address corporate image – market core competencies, value added. 	<ul style="list-style-type: none"> ➤ New DG has put management structure in place ➤ Lines of reporting clarified and current further discussion ➤ A revised strategy, IUCN being prepared for WSSD.
6. Financial viability and security	<ul style="list-style-type: none"> ➤ Strengthen weak financial basis – expand funding basis, find corporate support, move away from project funding. 	<ul style="list-style-type: none"> ➤ Continuing insecure financial structure ➤ Lack of funding strategy ➤ Review the costs of management, governance and HQ location and the effectiveness of cost recovery for technical and policy work. 	<ul style="list-style-type: none"> ➤ Funding mechanisms for regions to be reviewed, ➤ Project cost recovery is high risk ➤ Caution against establishing profit oriented consultancies as a solution to financial short falls. 	<ul style="list-style-type: none"> ➤ Lack of financial oversight. ➤ Financial viability concerns. ➤ Need for diversification of funding sources. 		<ul style="list-style-type: none"> ➤ Budgetary recognition of core costs of regional and country offices ➤ Review fund raising strategies, systems, opportunities, mechanisms 	<ul style="list-style-type: none"> ➤ Risk management reserve policies ➤ Liquidity situation monitored closely ➤ Project fund raising monitored closely versus planned, maturity, location ➤ Cost recovery policy under review ➤ Fundraising guidelines issued ➤ Some donor diversification achieved ➤ Current core fund project fund status improved since
7. Operational systems and capacities	<ul style="list-style-type: none"> ➤ Nationality is biased at HQ and in the selection of consultants - move away from Anglophone northern image - recruit more regional staff at HQ; 	<ul style="list-style-type: none"> ➤ Inadequate gender balance among staff at middle and higher levels at HQ 	<ul style="list-style-type: none"> ➤ Need to implement the Equal opportunities policy (EOP) 	<ul style="list-style-type: none"> ➤ Weak skills and capacities to interact effectively with donors. ➤ Weak HR capacity 	<ul style="list-style-type: none"> ➤ Variation in operational practices region to region ➤ Insufficient investment in communications and fund raising 	<ul style="list-style-type: none"> ➤ Define the role of Corporate Strategies in supporting the regional and country offices. ➤ Clear HR procedures and office operations. ➤ HR functions and systems should be a priority. ➤ Address equity issues in pay benefits and incentives. Invest in our staff. 	<ul style="list-style-type: none"> ➤ Recent large investment in communication raising positions ➤ New HR Manual policies under preparation
8. Membership development and services	<ul style="list-style-type: none"> ➤ Strengthen and expand the membership base ➤ Concerns about the benefits to the membership – little difference between attention paid to members who pay dues, and partners who do not. 	<ul style="list-style-type: none"> ➤ The need to clarify the interests of members – funding, involvement in programme, and to ensure that the expectations of members are not set at unrealistic levels. 	<ul style="list-style-type: none"> ➤ Concerns about the profile of the membership, and the need to review the structure and funding of membership services. 	<ul style="list-style-type: none"> ➤ Need for improved services to members and constituency development ➤ Need to assess the appropriateness of the membership for the Mission 	<ul style="list-style-type: none"> ➤ Possible conflict of interest of regional members who play mixed roles of adviser, joint implementer and governor (Councillor). 		
9. Commissions	<ul style="list-style-type: none"> ➤ Revitalize the Commissions 	<ul style="list-style-type: none"> ➤ Need to better coordinate the work of Commissions with regional programmes. 	<ul style="list-style-type: none"> ➤ Strengthen regional membership and focus of the Commissions 				

Performance area / issue	1. Review 1991-1993	2. Review 1994-1996	3. Review 1996-1999	4. Strategic Reviews 2001	5. Compass Study 1998	6. Bangkok Regional Director meeting 2002	Current Status of Measures Taken
10. Governance	➤	➤	➤ Strengthen regional governance bodies.	➤			➤ Governance Ta currently exami of regional gove structures.

SECTION 3

THE CHANGING EXTERNAL ENVIRONMENT:

The purpose of this section of the discussion paper is to look at how the external environment in which IUCN operates is changing in order to identify the implications for IUCN and its Programme. The analysis breaks down into three interrelated issues: the “big picture agenda” of emerging opportunities and challenges facing conservation, how donor priorities and delivery mechanisms are shifting, and what is happening in and around IUCN’s programmatic niche. This section of the paper raises issues and presents some hypotheses which are very much in need of ground truthing based on reflection from around the Secretariat, particularly from the regions. To state some limitations up front, space and time constraints have dictated that this overview focus primarily on global level issues, which may or may not be particularly relevant for our field operations in particular regions. In the absence of a comprehensive, up to date set of situation analyses from each regional and country office, regional and national assessment is limited.

15 THE GEOPOLITICAL ENVIRONMENT

WHAT DOES GLOBALIZATION MEAN TO US?

Discussion Question #1: What are the emerging challenges and opportunities for conservation and what are the implications for IUCN?

Writing shortly after Rio+10, ten years seems an appropriate historical lens with which to look back and reflect on how the world has changed, and how it is likely to change. Ten years ago, the Berlin Wall had come down and politicians were arguing about how to spend the “peace dividend;” Nelson Mandela walked out of prison and into the Presidency of an apartheid-free South Africa; global consumers were just rescued from the horrors of global oil prices above \$40 per barrel with the liberation of Kuwait; multilateralism was on the rise, evidenced by an unprecedented period of UN Security Council activism; and environment was at the top of the international agenda as Rio hosted the largest ever gathering of heads of state in the history of the world to sign global treaties on climate change and biodiversity. Ten years on, the global policy agenda is vastly different. The most pressing security concerns center on terrorism, non-state actors, and “failed states” as the principal security threats, rather than heavily nuclear-laden fellow states. The economic agenda has been transformed through the great decade of globalization, marked by both the massive wealth-generating bull market in global equity markets and steady declines in many least developed economies, and punctuated by severe macroeconomic disruptions in many emerging markets. And the environment has largely slipped off the global political radar screen, though it has been replaced somewhat by development concerns, particularly poverty and disease. What a difference a decade can make.

This section of the paper looks at the changing global economic environment and some of the implications this has for conservation, as well as some developments in civil society movements. It also surveys the future scenarios of the UNEP GEO-3 report to assess the implications of longer term trends for conservation. Finally, it identified a few key developments at the local and regional levels relevant to IUCN’s Programme.

A. The Impacts of Globalization

The expansion and intensification of globalization has emerged as a dominant feature of the post-Cold War world.⁴ However, globalization is not delivering the goods in terms of sustainable development or poverty alleviation. In its present form, globalization is an efficient and effective system for wealth creation, but it also carries with it the unintended consequences of wealth concentration, social dislocation, cultural homogenization and environmental degradation. The effects of globalization will vary from country to country and even within countries, depending on the extent to which particular countries are “plugged in” to the global economy. Three issues related to globalization are examined here: the potential impacts of the evolving trade liberalization agenda, conservation opportunities arising from foreign direct investment, and the potential impact of capital market volatility on conservation in emerging markets.

1. The Trade Agenda

The trade agenda as spelled out in Doha will focus largely on the service sectors as well as subsidies, making agriculture a particularly hot topic. This is also supposed to be the “development round” focusing on raising the concerns of developing countries around issues of market access. The countervailing issues of labor and environmental standards, which in WTO parlance are understood to mean northern non-tariff barriers, will likely loom in the background making for contentions and drawn out negotiations. The trade and finance regimes are not interested in taking into account environmental issues, and the one place where all of the sectoral issues of trade liberalization, development, the environment, human health, human rights and global finance are supposed to come together – WSSD - proved to be a disappointment in this regard. The irony is that trade liberalization should not be an end in itself, but rather a means to an end. Presumably, the goal is sustainable development, and trade liberalization should be judged by the extent to which it contributes to that goal. However, the political world is likely to continue to view environment as marginal to the larger economic agenda around which powerful domestic special interests coalesce. The conservation community will continue to fight an uphill battle to get the trade regimes to take account of environmental concerns, and the fight will largely be on their turf. Johannesburg sent very telling signal of the direction of things to come regarding the potential consistency and coherence between the sustainable development and economic liberalization agendas.

2. Foreign Direct Investment

Two of the distinguishing features of the globalizing world are the speed at which both money and ideas can circulate around the world. Foreign direct investment (FDI) flows to developing countries are over \$250 billion per year, or five times greater than ODA flows. Most of these flows go to a handful the economies of the major emerging markets: the top 12 countries in the early and mid 1990s, which collectively accounted for $\frac{3}{4}$ of FDI inflows, were China, Mexico, Brazil, Malaysia, Indonesia, Thailand, Argentina, India, Russia, Turkey, Chile and Hungary.⁵ Several of these are also mega-diverse countries, which should immediately put them on IUCN's

⁴ Globalization has been conveniently, if not precisely, described as “the inexorable integration of markets, nation-states and technology to a degree never witnessed before – in a way that is enabling individuals, corporations and nation-states to reach around the world farther, faster, deeper and cheaper than ever before, and in a way that is also producing a powerful backlash from those brutalized or left behind by this new system.” Thomas L. Friedman. *The Lexus and the Olive Tree*. (New York: Farrar, Straus, Giroux, 1999), p. 7.

⁵ Hilary F. French. *Investing in the Future: Harnessing Private Capital Flows for Environmentally Sustainable Development*. Worldwatch Institute, 1998.

radar screen. However, IUCN also needs to be concerned about the other ¼ of the FDI flows which are outside these 12 countries. Most of the FDI flows to emerging markets is in the manufacturing and services sectors, whereas a proportionally higher percentage of FDI flows to least developed countries is in primary resource extraction – sectors with a much more immediate impact on biodiversity.

These impacts of investment flows to developing countries are not new in terms of the conservation and development interface. What is new is the second element of globalization – the increased speed with which information can be transmitted around the world. One tangible result of this development has been the empowerment of local communities in their struggles against industrial-scale natural resource exploitation. That conflict is as old as industrialization, but local communities are increasingly recognized as legitimate and empowered stakeholders who cannot be as easily ignored by political or corporate elites as they once were. In a world that combines global corporate branding, the internet and shareholder demands for corporate accountability and sensitivities to corporate behavior (at least in most industrialized countries) global corporations tread on communities at their peril.⁶ The conflicts between the resource extraction industries and local communities will thus likely intensify, not because there will be more potential conflicts, but because communities are becoming empowered to be a party to the conflict.

Implications for IUCN: This creates an opportunity for IUCN to fill an emerging role as a mediator and honest broker between the primary resource extraction industries, local communities and conservation interests in FDI recipient countries.⁷ The ability to undertake this role is part of the unique, global value-added of IUCN. The conservation and livelihoods benefits could be substantial. The challenge, of course, is to find a way to fund this kind of work for IUCN, since it is not easily packaged to fit the bilateral donor model of a project.

3. Speculative Capital Flows

The third issue to look at in the globalizing world is the potential impact of speculative capital on conservation. Unlike FDI, the impacts of these capital flows are indirect. Over a trillion dollars a day sloshes around in global financial markets, in the form of currency transactions and portfolio equity investments. Current woes in global equity markets aside, there has been little development in the global financial institutional architecture which would lead one to believe that the volatility witnessed in the 1990s will subside. The emerging market economies, those that also receive the lion's share of FDI, are particularly susceptible to capital market volatility, as seen with the Mexican peso crisis, the Asian contagion in 1997, Russia's crisis in 1998 and, more recently, the Argentine crisis. In each case, the macroeconomic crisis has led to increased pressure on natural resources, either in the form of industrial scale exploitation of natural resources to generate hard currency reserves to service foreign debt (e.g. Russia) and/or in the form of small scale subsistence exploitation by the economically marginalized (e.g. Philippines.) (Indonesia is a good example of both.)

Implications for IUCN: Assuming that capital market volatility will not be tamed any time soon, one can anticipate that there will be recurrent and unpredictable pressures on natural resources and biodiversity in the emerging market economies. Ideally, IUCN and the rest of the

⁶ Shell's operations in Ogoniland in Nigeria are a classic case, but there are a growing number of examples. Note however that the levers of corporate accountability are far less effective for companies operating in developing countries that finance their operations from domestic capital markets.

⁷ Ultimately, this role could be expanded to conflicts in industrialized countries as well. The same issues and problems and opportunities pertain there, but it is just that much more difficult for IUCN to fund Northern operations.

conservation community should be there before the crunch comes in order to already have working models on the ground to present alternatives to unsustainable exploitation and be in a political position to engage with macro economic decision makers in these countries. However, funding for conservation activities in emerging markets from our traditional ODA sources is increasingly difficult, and will likely become more difficult as donor attention concentrates on poverty alleviation and therefore on least developed countries. We could try to develop domestic sources of funding in these countries, but these would be the first sources to dry up in a financial crisis. A second strategy would be to focus on developing the IUCN membership in emerging market countries, and building their capacity both politically and technically so that they can stand on their own two feet and engage on the front lines.

B. Civil Society Comes of Age

Civil society has evolved significantly over the last ten years, empowered to a large extent by the internet.⁸ Much of this evolution is empowered by, but also in opposition to, globalization. Civil society movements in the North have been galvanized by two interrelated aspects of globalization. The first is the increasing intrusion of the economic liberalization agenda into people's everyday lives, whether it be the debate about the impact of NAFTA North American jobs, or the type of glass bottle on European dinner tables being shaped by bureaucrats in Bruxelles through the process of declaring local recycling laws to be non-tariff barriers to trade in mineral water. The second galvanizing force has been the anti-American backlash as globalization is often experienced as American economic and cultural dominance. The result has been a proliferation of civil society movements and agendas, with an increasingly sophisticated understanding of the impacts of macroeconomic and corporate decision making, coupled with frustration at their seeming inability to influence those decisions.

Most of the critiques of the "anti-globalization" protestors in Seattle, as well as Washington, Prague, Quebec City and Genoa, argued that the movement was utterly incoherence, chaotic and disorganized and therefore worthy of dismissal. The first supposition is correct; the second isn't, and that is precisely the point. The "anti-globalization" agenda is chaotic; it explicitly embraces diversity of both means and ends. In this sense, it is truly post-modern - it rejects the notion that there is a single truth or vision to which all should aspire. This is the source of the movement's fundamental critique of the so-called "Washington consensus." The latter posits that there is a set of universal, neo-liberal macro-economic policy prescriptions that, if rigorously followed, will lead to the single, universal goal of economic growth. This diversity is perhaps the movement's greatest strength, but it is also the greatest challenge to IUCN.

Implications for IUCN: Given the increased differentiation within civil society, IUCN will have to do a better job of selling itself and its mission in the marketplace of ideas. The environment in general has slipped down in the political radar screen in part because the conservation community has not been particularly savvy in capturing popular or political attention relative to all of these other agendas over the last few years. But competition is not the answer; cooperation is. IUCN will have to build its capacity to engage with a wider range of partners in order to further its own agenda. In addition to other civil society actors, relationships with the private sector in particular need attention.

C. The Long-term Focus: UNEP's GEO-3 Scenarios

⁸ Note that this section of the analysis is written from a largely Northern perspective.

What does all of this mean for IUCN in the long term? A convenient way to approach that is to look at the four future scenarios developed by UNEP in their Global Environmental Outlook 3 Report.⁹

GEO-3 Future Scenarios:

MARKETS FIRST: Most of the world adopts the values and expectations prevailing in today's industrialized countries. The wealth of nations and the optimal play of market forces dominate social and political agendas. Trust is placed in further globalization and liberalization to enhance corporate wealth, create new enterprises and livelihoods, and so help people and communities to afford to insure against — or pay to fix — social and environmental problems.

POLICY FIRST: Decisive initiatives are taken by governments in an attempt to reach specific social and environmental goals. A coordinated pro-environment and anti-poverty drive balances the momentum for economic development at any cost. Environmental and social costs and gains are factored into policy measures, regulatory frameworks and planning processes.

SECURITY FIRST: This scenario assumes a world of striking disparities where inequality and conflict prevail. Socio-economic and environmental stresses give rise to waves of protest and counteraction. As such troubles become increasingly prevalent, the more powerful and wealthy groups focus on self-protection, creating enclaves akin to the present day 'gated communities'. Such islands of advantage provide a degree of enhanced security and economic benefits for dependent communities in their immediate surroundings but they exclude the disadvantaged mass of outsiders.

SUSTAINABILITY FIRST: A new environment and development paradigm emerges in response to the challenge of sustainability, supported by new, more equitable values and institutions. A more visionary state of affairs prevails, where radical shifts in the way people interact with one another and with the world around them stimulate and support sustainable policy measures and accountable corporate behavior. A consensus is reached on what needs to be done to satisfy basic needs and realize personal goals without beggaring others or spoiling the outlook for posterity.

The development and environmental implications of the four scenarios are starkly different, especially as the forecast period moves outward from today. Many of the adverse impacts to be felt over the next 30 years are already built into the system as a result of past decisions.

Summarizing some of the variable considered in the GEO-3 report presents a very worrying picture for the core business of IUCN, especially if one assumes that the most likely pathway for the world is some combination of the Markets First and Security First Scenarios. Under both of these scenarios, uncontrolled exploitation of natural resources is projected to increase, especially outside North America and Europe, together with the expansion of associated infrastructure development. The rapid loss of natural habitats will have severe impacts on biodiversity and indigenous peoples, in addition to the worsening impacts of largely unmitigated climate change. Coastal ecosystems in particular are singled out for increased degradation from overexploitation, pollution and infrastructure development.

The impacts on people are hardly encouraging either. The number of people living with severe water stress is expected to increase under all scenarios, but most especially under the Security First Scenario. Similarly food security is expected to decrease significantly under the Security First scenario for those living outside the elite enclaves, and to stabilize under the Markets First scenario as land is re-allocated for cash crop production. Biodiversity loss will continue in the short term under all scenarios, and fragmentation will increase rapidly under the Security First scenario. The Market Scenario may provide some protections in terms of both the protected areas estate for the elites and due to increased investment in agricultural technologies and productivity. Increasing poverty, especially under the Security First scenario, itself becomes an increasing important driver of biodiversity loss and ecosystem degradation.

Long Term Implications for IUCN: It would appear that there will be an increasing need for IUCN's services under the Security and Markets First scenarios, as degradation of the natural resource base would accelerate, though our policy influence and mission would be largely

⁹ UNEP. *Global Environmental Outlook 3*. Earthscan, 2002.

marginalized. Assuming that the donor dollars continue to flow, there will be plenty of project for IUCN, though far less policy work, under the Markets First scenario. The Security First scenario is perhaps the most worrying, since it is likely that donor dollars will shift from proactive natural resource management projects to reactive humanitarian assistance projects or security projects designed to keep refugees in place, without addressing the underlying causes of environmental degradation and conflict. While IUCN might be a preferred provider of environmental assistance in difficult governance situations, it is uncertain that there would be any willingness among donors to invest in natural resource management or that the chaotic governance infrastructure in many places would allow for effective project delivery. The Sustainability First scenario would represent the realization of IUCN's core mission over time. IUCN's role there would fundamentally shift from being an implementor to being a facilitator of action by others. The Policy First scenario would perhaps mean the largest potential growth scenario for IUCN, as it would generate huge demand for IUCN's services around our core strategies of knowledge, empowerment and governance.

D. A few reflections below the Global Level:

Dropping the level of analysis below the global level for a moment, and scaling back to a shorter time horizon, a few key trends emerge over the last ten years of particular relevance to the IUCN Programme. First of all, at the local level, we have developed significant experience with *community based natural resource management strategies*. Unlike Rio, we now tend to view the poor as part of the solution to sustainable natural resource management, rather than as part of the problem. This has led the conservation and development communities to develop a whole basket of strategies around empowerment, tenure reform, gender equity, etc. through projects such as the Zambezi Wetlands projects, and the Mountain Areas Conservancy Project in Pakistan. Second, numerous *regional policy and technical processes*, as opposed to global ones, have also emerged as effective mechanisms to deal with transboundary issues through an ecologically defined space, rather than through a politically defined space. Examples with significant IUCN involvement include the Mekong River Commission, Nile Basin Initiative in East Africa, CEFDHAC forest work in Central Africa, and the Meso-American Biodiversity Corridor.

Implications for IUCN: Looking ahead in the short term, the focus on community based natural resource management should remain central to the IUCN Programme, as it provides an organizing principal to connect our conservation work to the trendy poverty alleviation agenda through the articulation of a sustainable livelihoods approach. Regional processes are also likely to remain a potent arena in the future and offer a potential growth area for IUCN to provide both policy and technical advice. IUCN has a strong comparative advantage to engage in these processes where we have a wide network of country offices within a given region.

16 THE SHIFTING DONOR AGENDA:

HOW ARE WE GOING TO KEEP FEEDING OURSELVES?

Discussion Question #2: How are donor priorities in terms of both a) programmatic interests and b) delivery mechanisms likely to evolve in the coming years and how will that impact on IUCN?

A. The Poverty Alleviation Focus

The donor agenda has shifted over the last few years towards an increased interest in poverty alleviation. In theory, this is all well and good, but this shift has meant in practice that donors are focusing on “basic human needs” issues of healthcare, food security, basic education, and women and children’s issues.¹⁰ Conservation and environmental issues are increasingly dropping off the agenda. Senior officials in donor agencies may still underscore the importance of environment, but at the programmatic level, where project decisions are made, most donor officials still tend to view environment as a sector and, in response to signals to prioritize poverty alleviation, tend to dismiss environment. While we may argue that rural poverty cannot be adequately addressed in the long term unless the natural resource base is conserved and well managed, IUCN is increasingly forced to justify its project interventions in terms of the poverty alleviation benefits. This trend is likely to continue for the foreseeable future.

Connecting the dots between Doha, Monterrey, Kananaskis and Johannesburg, the development agenda appears to be becoming increasingly mainstreamed in global policy debates, but based on an increasingly narrow conception. Doha launched the so-called development round of trade liberalization, but within the context of the WTO, development is simplistically conceived of as increase wealth in developing countries measured in GNP growth, without a sophisticated understanding of the distributional aspects of that growth, and thus of the poverty alleviation benefits of trade liberalization.¹¹ Monterrey did produce commitments to real increases in ODA,¹² after a decade of declining ODA levels, but one can speculate that this is a one-off increase as part of the OECD governments’ response to 9/11. The discussions of NEPAD in Kananaskis were somewhat worrying as it was finally revealed to the G8 countries that NEPAD offers a 1970’s model of development based on large scale infrastructure projects and minimal environmental concerns. The principal negotiation there was about how much of the Monterrey increment would be targeted specifically at Africa, not about the nature of the development model being put forward or accepted.

The discussions at Johannesburg were also worrying, forcing the IUCN delegation at one point to put out a press release asking what happened to the environmental pillar of sustainable development. The Summit tried to conceptualize sustainable development as being comprised of three interdependent sets of issues: poverty alleviation, natural resource conservation and sustainable use, and sustainable production and consumption. However, the debate has cynically focused on only the first of these issues. Many of the developing countries went along with this deal because they thought it was a way to focus the agenda on “their” issue of development, as opposed to environment. And the OECD countries went along with this deal because, in UN terms at least, poverty is only a problem in the South, which means that the issues that would impact on Northern lifestyles – natural resource management and production and consumption patterns – would be conveniently left off the negotiating table. Instead, the only question for the northern countries to answer in Johannesburg was how deeply they were going to dig into their

¹⁰ The Millennium Development Goals, adopted by the UN General Assembly in December 2000 commit the international community to reduce by half by 2015 the proportion of people living on less than one dollar per day, who suffer from hunger, and who do not have access to clean drinking water. Maternal mortality is to be reduced by ¾ and under age five child mortality by 2/3. Universal primary education is to be achieved by 2015, and AIDs, malaria and other infectious diseases are to be brought under control. UN General Assembly, A/res/55/2) The World Bank has estimated that achieving the Millennium Development Goals will require doubling current ODA levels from roughly US\$ 50 billion per year to 100 billion per year.

¹¹ The Doha round is also supposed to address subsidies. Global aggregate subsidies to the agricultural sector amount to about US\$360 billion per year, while the energy sector is a close second at roughly US\$300 billion per year. A 7.5% reduction in each of these global subsidies would generate the estimated US\$50 billion needed to achieve the Millennium Development Goals.

¹² The EU pledged to achieve an average national level of ODA of .39% of GDP by 2006, which, if met, will represent a \$7 billion increase in 2006 over current levels and a \$20 billion cumulative increase over the period 2000-2006. The US pledged to increase its ODA by \$5 billion over three years, leading to a 50% increase over current levels by 2005.

pockets to pay for poverty reduction. The sad truth was that their answer was: we already gave at Monterrey. With the exception of financial commitments from the Europeans for sanitation and renewable energy, there was little new on the table. The poverty alleviation focus will remain, and many of the donors may latch on to this as a way of further concentrating their aid portfolios along social and economic development lines to the exclusion of environmental and natural resources interventions. Ultimately, this is a short sighted and self-defeating strategy.

Implications for IUCN: In order to respond to these concerns, IUCN can 1.) make a tactical choice to re-package our project portfolio to present projects as having significant poverty alleviation benefits and/or governance benefits (another increasingly popular theme in the donor community) or 2.) take a strategic decision to re-orient the Programme and actually shift the focus away from our traditional conservation heartland type projects, or 3.) take a strategic decision to engage with the donor community and challenge the prevailing development model. These are not necessarily mutually exclusive options, and the first is already happening. The logical entry points for these latter discussions would be to engage with the donor community around the emerging poverty reduction strategies at the national level. At both the policy level and the field operations level, IUCN will likely need to devote far greater time and attention to these processes.¹³ Of course, IUCN could also take a tactical decision to sit tight and wait it out, in anticipation of the next trend in donor priorities. Through the 3 I-C Fund, IUCN has already initiated several new initiatives such as on conservation and sustainable livelihoods which will address some of the issues outlined above.

B. The Rightward Shift in European Governments

A second issue to examine is the shifting short term political landscape in Europe. Since the majority of our project and framework funding comes from European governments, the rise of right of center governments in Europe is also a cause for concern in terms of its impact on IUCN's funding base. The Danes notwithstanding, it is unlikely that the total pot of development assistance from the Europeans will decline over the next few years, given the fact that the EU's commitments in Monterrey were for an increase in *aggregate* EU funding.¹⁴ But how that aid is delivered and what it is spent on will likely shift in the new political landscape. Three potential changes concern further tying aid, favoring field project over policy work, and focusing on poverty to the exclusion of environment

Implications for IUCN:

- The EU pledged at Monterrey that its aid to least developed countries would become increasingly untied. Nevertheless, it is likely that aid to other countries will be increasingly tied. This presents a challenge for IUCN. While we are well positioned in theory to work with our European members to jointly deliver projects, we do not have a very good track record in this regard.
- There will probably be more of an emphasis on concrete project implementation where donor agencies can "plant the flag" and show concrete, site-specific deliverables to their Parliaments. Conversely, policy, capacity building and networking projects will likely be de-emphasized. For IUCN, this implies that our regional and countries offices may have a relatively easier time attracting funding for field projects, while HQ may have a more difficult

¹³ For a discussion of potential approaches, see: OECD DAC. "DAC Guidelines on Integrating the 'Rio Conventions' in Development Co-operation." DCD/DAC(2002)19, 17 May 2002.

¹⁴ By 2000, five countries achieved the target of .7% GDP for their ODA: Denmark (1.06%); Netherlands (.84); Norway (.80); Sweden (.80); and Luxembourg (.71). The EU countries collectively contribute about \$25 billion, about half of the world's ODA. The five largest ODA donors in 2000 were Japan (\$13.51 b); US (9.95); Germany (5.03); UK (4.50); and France (4.10).

time attracting framework agreement and core funds, as well as funds for policy work and networking.

- The focus on poverty alleviation projects as well as infrastructure projects, to the exclusion of environmental projects, will likely intensify. This could have a negative impact on the overall IUCN portfolio.

C. The Apparent Donor Shift to a Sectoral Approach

A third issue for consideration is that fact that a number of our European donors are indicating that they are shifting over to a sectoral approach to aid delivery, as opposed to the traditional project by project approach.¹⁵ To the extent that this shift really occurs, it probably presents a growth opportunity for IUCN. The trends towards a sectoral approach appears to be a bureaucratic strategy of the European donors to deal with their own recentralization processes and downsize their own staff. Instead of having a single project officer running five field projects within one sector, a programme officer could run five sectors. At the field level, ODA will still be delivered through a series of projects with the donor essentially outsourcing the sectoral portfolio management to a single sectoral recipient instead of five project recipients. This has the long term disadvantage of reducing the donor's capacity for project management and institutional learning, but it has the short term bureaucratic advantage of reducing donor agency staffing levels.

Implications for IUCN: Should this trend continue, IUCN can strategically position itself as an effective sectoral portfolio recipient, manager and implementor. We are already doing this in a number of places. The one risk is that donors will find it easier to disburse funds in large quantities to multilateral institutions to pool and manage sector portfolios. In a number of places around the world, IUCN can position itself to compete with UNDP for example, or we can position ourselves as the project level implementor for multilateral institutions. The increase in our funding base from multilateral institutions may actually indicate that this is already underway. In any case, the hypothesis is that a shift in donor preferences to a sectoral approach to aid delivery is actually a growth opportunity for IUCN regional and country offices, if we position ourselves cleverly.

D. Competition from Government Agencies for Project Delivery?

A fourth issue to consider is whether IUCN is becoming a victim of our own success. The phenomenal expansion of IUCN's field project portfolio in the 1980s and 1990s was largely possible due to the confluence of three factors: donors were increasingly willing to fund environmental interventions; recipient governments had relatively poor capacity to implement these projects; and IUCN was able to fill the resulting capacity gap. At the present juncture, a number of our developing country government members have developed greater project delivery capacity and are questioning why donors should give projects to IUCN when they could give them directly to government agencies. While this is not a new concern for IUCN, many of the donor agencies appear to be more willing to accept this argument from recipient governments.

Implications for IUCN: To the extent that this trend plays out, there are important implications for IUCN's field operations. IUCN may need to more carefully distinguish between

¹⁵ This trend towards a sectoral approach does not appear to be occurring in North America. The President of CIDA has been pushing sector-wide approaches for some time, but has so far been unable to convince the Minister above him or the troops below him, and he appears unlikely to do so in the near term. In the US, it appears that USAID will continue along a project model with significantly tied aid. Increases in funding for multilateral institutions from the US also appear unlikely under the current administration.

countries where government agencies have adequate capacity and a favorable civil society climate to implement conservation projects on their own. In those cases, IUCN's secretariat presence will have to shift to being a facilitator, convenor and provider of quality technical and policy advice. In those countries where government capacity and civil society are still weak, IUCN can function more effectively as a project implementor, in addition to these other roles.

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WHAT MAKES US SO SPECIAL?

Discussion Question #3: How is IUCN's niche evolving and how can IUCN adapt to ensure complementarity with our members rather than competition?

IUCN is a competent conservation project implementor, but we are not the best in the business globally. We stack up favorably in some regions and less so in others. Secretariat operations are also constrained by our ability to raise project restricted funds from the bilateral donors, which means that we will tend to work in developing and least developed countries, as opposed to middle-income countries. Our members such as WWF, TNC and CI, which fundraise directly from the public and therefore have the luxury of unrestricted dollars to invest, have far more flexibility to choose where they will work based on biodiversity concerns alone. Nevertheless, our greatest comparative advantage in terms of project delivery derives from our hybrid membership structure. Because of our ability to work closely with governments, and their relative comfort with us, we have a comparative advantage to work in politically difficult circumstances and in countries with relatively undeveloped civil society movements.

IUCN's global value added lies not in its project delivery capacity, but in its convening power and its advocacy potential. IUCN has a clear advantage relative to any other NGO in the intergovernmental processes by virtue of our unique membership. That membership affords us unparalleled access to governments both nationally and internationally and also instills significant credibility because of the discipline imposed by our accountability to our membership. To be effective, the substance of our advocacy work rests in our ability to link science and policy and in our ability to link policy and practice. However, several commentators have noted that our capacity to do both has diminished as a result of, or in parallel with, the regionalization and decentralization process.

Implications for IUCN: This assessment provides some indication of the *how*, but not the *what* of our advocacy work. If we are to be truly effective, IUCN will have to engage with a much wider audience. We tend to spend too much time preaching to the conservation choir about biodiversity and not engaging with the broader geopolitical agendas of the day. At the moment, the world is captured by the themes of security and economic growth to the exclusion of environment and natural resource management. While development is on the global agenda (as defined by the G'8 at least) there is a very short term understanding of what development is, as if it was somehow disconnected from time and place and not dependant on a secure natural resource base. This is both a threat to our own long term agenda and an opportunity for IUCN to engage more substantively with the existing power structures and challenge the prevailing agenda. The current short term, classical concerns with security, economic growth, and development are all doomed to fail in the long term so long as the world fails to grapple with the underlying causes of social dislocation and environmental degradation – in other words,

the sustainable development agenda. IUCN is perhaps uniquely positioned to build alliances with our members and speak on behalf of the conservation movement as a whole and thus add value not only to our own work, but that of our members as well. This implies a far greater facilitation and advocacy role for the secretariat than has heretofore been the case. *The World Conservation Strategy* in 1980 helped to put conservation and sustainable natural resource management on the political agenda and demonstrate that it was integral to development. Today, we need to take this to the next level and demonstrate how our core agenda is integral to security and economic wellbeing.

Of course, the biggest immediate challenge to making any of this happen is funding. As much as the donors and our major partners praise IUCN for its convening power and policy influence, donors largely fund IUCN through field projects. And those field projects carry small overheads which marginally cover management costs for delivering the projects themselves, let alone synthesizing lessons, sharing them across the Union, and turning them into the intellectual basis for sound policy advice. Framework agreements do provide some support for IUCN's global value added, but if we are to exploit the ever-unrealized potential of the Union, we will have to do a better job of challenging the donors to support what they want us to uniquely provide.

ANNEX 1: SYNTHESIS OF PERFORMANCE ISSUES FROM 1991-2002

The External Reviews of 1991 – 2000

1. The issues and recommendations raised in the **External Review of 1991** included¹⁶the need to – (pg 23)

- Find effective operational approaches to linking nature and conservations objectives with development aspirations.
- Improve IUCN's capacity for economic and social analysis, including gender.
- Improve project planning and programming approaches (pg 4) - formulate better project identification and project evaluation procedures
- Strengthen the membership base
- Revitalize the commissions and expand other scientific networks
- Formulate clear policy of regionalization of IUCN offices – address 'ad hoc' nature of opening offices, guard against fragmentation, move to bilateral regional arrangements, move to programme funding and programme activities.
- Overcome image problems – move away from an Anglophone, northern HQ, recruit staff from more of the regional cultures of IUCN
- Strengthen IUCN's weak financial basis – expand core and unrestricted funding base and move away from relying on project support., and find corporate sources of support.

- Concerns raised regarding the benefits apparent to the membership – little difference between attention paid to members who pay dues, and partners who do not.

2. **The 1994-1996 Review** highlighted that while some progress had been made on these issues, notably the expansion of the membership and the continued decentralization of programmes (pg 5), there was still a need for a major shift in attitude, function and role of the 'centre' in supporting a decentralized Secretariat. (pg 17)

In addition the following issues are highlighted (Page 27)

- Weak links between the regional programmes and the technical programmes pursued at HQ
- Excessive fragmentation of HQ units and programmes.
- Programme – more focus needed, more bottom up programming, learning and evaluation functions needed.
- In some regions, lack of focus and coherent regional work programme.
- Inadequate links between policy and field activities.
- Weak learning processes.
- A continuing insecure financial structure, and the need for a clearly articulated fund raising strategy.
- The need for more improved cost control systems in work programming, budgeting, governance and overall management costs.
- Inadequate gender balance among staff at middle and higher level positions at HQ.
- A need to better coordinate the work of the Commissions with regional programmes.

¹⁶ Report of the External Review of IUCN 1991-1993, pages 13-22

- The need to clarify the interests of members – funding, involvement in programme, etc. and to ensure that the expectations of members are not set at unrealistic levels.

3. The 1999 Review again reviewed progress in addressing many of these issues. They noted that some, but not sufficient, progress had been made in addressing most of the issues listed above, and that continuing issues of concern were – northern bias and gender imbalance among middle and senior level staff at HQ, and a failure to improve the major weaknesses in IUCN's financial situation. (page 11)

The 1999 Review raised major concerns including -

- the inadequate focus and framework of the overall IUCN Programme focus (pg 15), failure to adequately address lack of capacity for economic and social analysis in the Programme (pg 20)
- management – the need for vision, leadership, handling growth, effective business planning and quality assurance, and equal opportunity policies. (pg 37)
- regionalization and decentralization – again the need for the centre to redefine itself to support regionalization and decentralization, the fragmentation of the Secretariat at the centre, poor coordination and links between global programming and regional programmes, the need to redefine power relationships between the regions and the centre, uneven regional performance, inadequate management arrangements to support the Union's regional programmes, lack of mentoring and development of management capacity in the majority of IUCN regions where that capacity is lacking. (pg 23-24)
- governance – the need to strengthen regional governance bodies (pg 29)
- the Commissions – the need to strengthen regional membership and focus of the Commissions.
- Maximizing knowledge and learning – improving mentoring, accessing and building knowledge, monitoring and evaluation, learning lessons at all levels of the Union.
- Membership - concerns about the profile of the membership, and the need to review the structure and funding of membership services.

4. The Compass Study found –

- there was no clear strategy for regionalization setting out roles, responsibilities and accountabilities for all parts of the Union (pg 8)
- there was considerable variation in operational practices region to region (pg 9)
- fragmentation of programmes, processes and behaviours as a result of regionalization (pg 16)
- insufficient organization investment at the centre in communications and fundraising (pg 16)
- reporting formats and monitoring cycles do not meet operational needs, not strategic or cumulative. (pg 16)
- possible conflict of interest of regional members who play mixed roles of adviser, joint implementor (in some cases) and governor. (pg 23)
- recommendations included – criteria for establishing a region, specifying the stages of development and the resources required, defining the role of senior management in completing regionalization, setting a milestone plan for completing regionalization. (pg 10)

5. The Strategic Reviews of 2001

The Strategic Reviews focused on the specific performance and operation of individual offices

and as such did not look at overall institution wide issues pertaining to R&D, however looking across the findings of the Strategic Reviews many of the overall assertions of the broader Reviews are validated by findings such as -

- Lack of clear mandate, purpose and rationale of some regional offices
- Lack of clarity between and among some regional offices with overlapping statutory boundaries, and weak inter office coordination
- Weak leadership and vision
- Inadequate management skills and systems
- Poor or weak integration with global programmes and Commissions
- Weak policy development skills and capacities, and little assistance from HQ on this
- Limited capacities for project and programme planning
- The need for improved services to membership and constituency development
- The need to assess the appropriateness of the membership to the Mission of IUCN
- The need to involve members more in programme delivery
- The need for improvement in skills and capacities to interact effectively with donors
- Weak human resources capacity
- Lack of financial oversight and concerns about financial viability and diversification of funding sources.
- The need for increased monitoring and evaluation, and ongoing training.

6. The Bangkok meeting of Regional Directors

Although the Bangkok meeting was not a review or evaluation, Regional Directors did identify issues that needed to be addressed for the Secretariat to function effectively as a regionalized and decentralized organization. These included the following -

- Financial management, including - the need to address financial management issues that are hampering the effectiveness of a decentralized secretariat, budgetary recognition of core costs of regional and country offices, and the need to review fund raising strategies, systems, opportunities, mechanisms.
- The need to clarify roles and responsibilities of various units in the Secretariat – including – the role of IUCN in northern countries, outposted offices, the division of responsibility between HQ, regions and country offices, the role of HQ in a decentralized union, the role of Corporate Strategies in supporting regional and country offices, and ensure coherence of the parts of the Union (Sect, Commissions, regions, members)
- Managing IUCN's niche and image - explore the niche that IUCN regions and country offices can identify, addressing corporate image – market core competencies, value added, maintaining IUCN's stature and reputation.
- Clear engagement strategy needed for new country and regional offices
- Strategy needed for priority areas where the Sect should be present, criteria needed for future planning and adjustment of offices.
- Examine the impact that a project focus has had on the image of IUCN.
- Guidance needed on how to best engage global and programme programmes more effectively
- Examine the impact of decentralization on the focus and strategy of the programme, and assess the extent to which the lack of strategy has affected the quality of delivery in the Programme.
- Improve knowledge synthesis and innovation, develop mechanisms, strategies to better synthesis lessons and experience across the Union.

- Management concerns included concern about efficiency of management services
- Operational issues included the need for improved HR functions and systems as a priority - clear HR procedures and office operations, a commitment to invest in staff, and to address equity issues in pay benefits and incentives.

ANNEX 2

THE RESPECTIVE ROLES OF HEADQUARTERS AND REGIONAL OFFICES

Secretariat at Headquarters will focus on:	Secretariat in Regional & Country Offices will focus on
<ul style="list-style-type: none"> a) The direction, under the Director General, of the world-wide operations and governance of the Union, ensuring that the decentralised units of the Secretariat operate in an integrated way, and implement the policies defined by the World Conservation Congress and Council; b) Central policy development, in scientific, technical and managerial fields, drawing especially upon the expertise of the Commissions and other voluntary networks; c) Supporting the Commissions and other voluntary networks in their work at global level, and as vital professional resources for the Union; d) Servicing and supporting the World Conservation Congress, Council and its Committees; e) Convening workshops on matters of global concern f) Maintaining central scientific and technical expertise, and deploying this in support of Regional Offices, Commissions and IUCN members and partner organisations; g) Preparing the overall budget of the Union, allocating finance, and undertaking management and finance audits of all IUCN offices; h) Overall public relations and communication on behalf of the Union at the global level; i) Participating on behalf of the Union (or arranging representation of it) in global fora; j) Communicating regularly with the world-wide membership 	<ul style="list-style-type: none"> a) Developing proposals for programme activities, in consultation with members, and communicating these proposals to Headquarters; b) Supervising the execution of regional programmes, in partnership with members, and assisting members in the fulfilment of their own missions; c) Convening Regional Forums, meetings of Regional Chapters and workshops and assisting Regional Councillors; d) Assisting regional activities of Commissions and other voluntary networks; e) Maintaining communication with IUCN members, consulting them on issues raised by IUCN Headquarters, and ensuring that those of their concerns and requests that cannot be handled regionally are passed on to other parts of IUCN; f) Seeking funds to support these and other activities; g) Evaluating and conveying results and experiences to IUCN Headquarters, as a contribution to the global activities of the Union; h) Advising States, Government agencies and NGOs interested in becoming members of IUCN on the benefits and obligations, and assisting Headquarters in processing applications for membership in the Union; i) In general animating the network of members and partners, and the Commission structures within a region, in support of the objectives and Mission of IUCN

Source: 1994 Strategy of IUCN as adopted following the 19th Session of the IUCN General Assembly