



Rainforest Foundation
Norway



20 years
IN SOLIDARITY
FOR CHANGE

State of Funding for Tenure Rights

DONOR FUNDING FOR INDIGENOUS
PEOPLES, LOCAL COMMUNITIES, AND
AFRO-DESCENDANT PEOPLES
(2011–2024)

SEPTEMBER 2025



Acknowledgments

Report and underlying research prepared by Michael Owen, Sam Allnutt, and Jeffrey Hatcher, Indufor North America.

The following people provided valuable insights and inputs: David Kaimowitz (Tenure Facility), Deborah Sanchez (CLARIFI), Claire Taylor (Ford Foundation), Casey Box (FPC), Lorene Moran-Valenzuela (RRI), and Kevin Currey

Project Lead at RFN: Torbjørn Gjefsen

Project Lead at RRI: Bryson Ogden

Report Editor: Madiha Waris

Design: Ashley Young for Publications Professionals

Contents

Acknowledgments	2
Executive Summary	3
Introduction	4
Global Funding Trends for IP, LC, and ADP Tenure Rights	6
Regional Funding Trends	11
Trends in Funding Mechanisms and Pathways	15
Key Findings and Recommendations	19
Annex	21

Cover photo: A member of the Maasai tribe in Kenya. Photo by Asha Stuart.

Executive Summary

Findings

The second State of Funding for Tenure Rights report provides an updated analysis of international donor funding for Indigenous Peoples, Local Communities, and Afro-descendant Peoples (IPs, LCs, and ADPs) in tropical countries from 2011 to 2024. This year includes an expanded scope to all terrestrial ecosystems, recognizing the importance of tracking funding beyond forests.

Since the 2021 COP26 Forest Tenure Pledge, annual funding has increased by 46 percent compared to the previous four-year period, averaging \$728 million per year. The Pledge has been successful in mobilizing new resources for IP, LC, and ADP tenure rights funding, with over half of the global increase in funding since 2021 attributable to the Pledge signatories. The increase reflects mobilization of resources by both new and historical donors, with key donors such as Germany and the World Bank doubling their disbursements relative to the prior four-year period.

Despite this growth, funding for tenure rights remains below one percent of climate aid. Tenure rights funding has also declined gradually since a 2021 peak, potentially signaling waning momentum and a need for renewed commitments.

This report highlights a \$2.9B funding gap towards meeting the \$10 billion [Path to Scale target](#) if current trends continue. The closure of the United States Agency for International Development (USAID) in 2025, historically a major donor, leaves an estimated additional \$394 million shortfall over the next five years.

Since 2020, increased funding has led to a broadened and more balanced geographic scope, with more countries receiving support for the first time, and strong disbursement growth in Africa and Asia. However, signs of slowdown are emerging. The tightening international aid environment will have broad impacts, with some countries and regions likely to be affected more than others. Colombia is the country with the greatest absolute exposure to USAID cuts, with USAID providing nearly \$90 million in disbursements to IP, LC, and ADP tenure rights since 2020.

The report also examines how funding pathways have developed. The funding system has expanded in size and laid the groundwork for more direct support, but it has not yet undergone a fundamental shift in how resources are delivered. Bilateral and multilateral donors still rely heavily on intermediaries, and funding for IP, LC, and ADP women's organizations remains insufficient and unstable.

Recommendations

- Donors should renew their commitments through a new IP and LC Land Tenure Pledge at COP30, aiming to at least maintain the funding levels achieved after the COP26 Pledge. Our

analysis suggests that donors should target at least \$2.2 billion to adjust for inflation and expansion into other non-forested terrestrial ecosystems.

- To fill the gap left by USAID, other donors need to scale up their financial support to prevent an overall contraction in resources. Bilateral and multilateral donors institutions will need to carry forward USAID's political leadership in advancing localization agenda.
- Donors both within and outside the Pledge should look at how their funding can support the Intergovernmental Land Tenure Commitment promoted by FCLP, Brazil, Peru and Norway.
- Donors should support the establishment of the Tropical Forest Forever Facility and the operationalization of its requirement to allocate 20 percent of disbursements to IPs, LCs and ADPs, to make sure this becomes a mechanism for large-scale direct funding to rightsholders.
- Donors and intermediaries should work towards giving longer-term, flexible support so that funding to new projects, countries and regions can work towards longer-term objectives and processes, recognizing that achieving tenure rights takes time.

Introduction

Since 2021, Rainforest Foundation Norway (RFN) and the Rights and Resources Initiative (RRI) have provided regular analysis and overviews of key trends in international funding for Indigenous Peoples, local communities, and Afro-descendant Peoples (IP, LC, and ADP) tenure rights and forest management projects.¹ Last year's report showed promising upward trends in the scale of funding to strengthen IP, LC, and ADP rights to land and natural resources, primarily driven by the COP26 IP and LC Forest Tenure Pledge (the Pledge).² The Pledge, made up of Forest Tenure Funders Group (FTFG) pledge signatories, is on track to meet or exceed its \$1.7 billion commitment by the end of 2025.

However, the past year has presented new risks to rolling back this progress. The United States Agency for International Development (USAID), responsible for 12 percent of IP, LC, and ADP tenure rights funding since 2011, was shuttered. Rising global geopolitical tensions and broader rollbacks in international development aid threaten to deprioritize rights-based conservation and climate action.³

This tightening aid environment comes at a crucial moment for both climate action and IPs, LCs, and ADPs. COP30 in Belém in November 2025 is a key international moment to show and maintain progress towards the Paris Agreement objectives and the broader fight against the dual biodiversity and climate crises. The Brazilian COP Presidency has signaled high ambitions for Indigenous Peoples and other rightsholders at COP30 as a key partner in delivering progress on the Glasgow Forest Declaration to end deforestation and forest degradation by 2030.

Amidst rising risks, new concrete opportunities to increase support have emerged. The COP26 IP and LC Forest Tenure Pledge is expected to be renewed at COP30. The Forest & Climate Leaders' Partnership (FCLP), under the leadership of Brazil, Peru and Norway, is working toward a new intergovernmental land tenure commitment from tropical forest countries to strengthen land tenure recognition and governance.⁴ Brazil is championing the establishment of the Tropical Forest Forever Facility (TFFF) at COP30, aiming to mobilize over 3 billion in annual disbursements to tropical forested countries to conserve rainforests, with a specific provision that countries must allocate minimum 20 percent of these payments to IPs, LCs and ADPs.

The end of 2025 is shaping up to be a critical moment to mobilize support for IP, LC, and ADP tenure rights and 2030 targets. In this second edition of the *State of Funding* report, we revisit funding trends globally and regionally, evaluate progress against the Pledge, and examine how the funding landscape for IPs, LCs, and ADPs has developed since the 2024 *State of Funding* report

Methodology Updates: Expanding to All Terrestrial Ecosystems

For the first time, this analysis and the Path to Scale Dashboard will now explicitly include funding for IP, LC, and ADP tenure rights outside of tropical forest ecosystems.⁵ This extended scope captures financial support to the stewardship of grasslands, savannas, rangelands, peatlands and other inland wetlands, and mountain systems in tropical countries, landscapes that hold critical climate and biodiversity value and are managed by communities whose governance systems and cultural practices sustain them. Grasslands and rangelands, which cover nearly half of the Earth's land surface and store roughly one-third of terrestrial carbon, are maintained through pastoralist traditions that balance mobility, grazing, and ecosystem health.⁶

Expanding the ongoing monitoring and analysis to include activities in these ecosystems is intended to recognize the breadth of IP, LC, and ADP contributions to climate stability and biodiversity conservation, and allows us to assess donor support to IPs, LCs, and ADPs across both forested and non-forested landscapes in anticipation of a renewed COP30 Pledge that extends to non-forested ecosystems.

To allow comparison with previous years' reports, we have included an annex estimating donor-reported activities in forests. Because donors vary in how precisely they describe geography and ecosystems, we use an expansive "forests" baseline: any explicit mention of forests, forest ecosystems, or widely recognized forest geographies (e.g., the Amazon). Under this definition, at least 80 percent of funding explicitly references forests—and this share has been consistent from 2011-2024.

Five years after the publication of "Falling Short," we have rebased our constant-dollar series from 2020 to 2024 and re-expressed every transaction in constant 2024 USD using an OECD-aligned approach. Therefore, all figures presented in this report are adjusted to 2024 USD. We provide further methodological details in the annex including our process to annualize reported philanthropic data and other data correction specifics.

TABLE 1 | Intended uses of the Path to Scale Funding Dashboard

The Path to Scale Funding Dashboard is a tracking tool that opens access to all publicly available funding data on IP, LC, and ADP tenure rights projects since 2011. Up to this point publicly available data on funding flows have been complex, fragmented, and inaccessible. The dashboard makes data available through a user-friendly online platform, allowing donors and other stakeholders to analyze, filter, and export historical data, understand current funding flows, and identify key opportunities to scale up funding for IPs, LCs, and ADPs.

Donors	<ul style="list-style-type: none">• Identify gaps and opportunities in the IP, LC, and ADP funding landscape• Learn how peers are fulfilling pledges, localization commitments, and accelerating direct funding pathways• Find potential collaborators funding similar projects, themes, and/or geographies
Rightsholders and Allies	<ul style="list-style-type: none">• Hold donors accountable for follow-through on their public commitments• Inform strategy and project formulation• Find potential strategic partnerships locally and/or globally

Global Funding Trends for IP, LC, and ADP Tenure Rights

A new stabilized funding level or waning momentum?

Funding for IP, LC, and ADP tenure rights has increased sharply since 2021, but declines since the 2021 peak signal a need for renewed momentum. Since the Pledge (a 5-year commitment starting in 2021), annual funding has averaged \$728 million per year—a 46 percent increase since the preceding four-year period. The Pledge has succeeded in mobilizing new resources, with over half of the increase attributable to Pledge signatories from 2021 to 2024.⁷

In 2024, however, total disbursements dropped to \$642 million, down 23 percent since the first year of the Pledge. As many donors fund in multi-year cycles, it remains to be seen if this downward trend is durable or will bounce back.⁸

IP, LC, and ADP tenure rights continue to receive only a small share of climate-related philanthropy and official development assistance (ODA). This share has grown in recent years, but remains below one percent. Rainforest Foundation Norway’s 2021 *Falling Short* report found that, between 2011 and 2020, just 0.74 percent of the equivalent climate ODA was directed to “Indigenous Peoples and local communities’ tenure and forest management in tropical countries.”⁹ Revisiting this analysis, we find that the share has risen since the Pledge, reaching 0.91 percent between 2019 and 2023, meaning that funding to IPs, LCs, and ADPs is rising faster than broader increases in climate finance. Foundations, though smaller in overall scale, dedicate a significantly larger share of their climate-related funding to IPs, LCs, and ADPs—4.79 percent compared to 0.53 percent for multilateral donors and 0.98 percent for bilateral donors (Figure 2).

FIGURE 1 | Global Annual Disbursements to IP, LC, and ADP Tenure Rights, 2011-2024

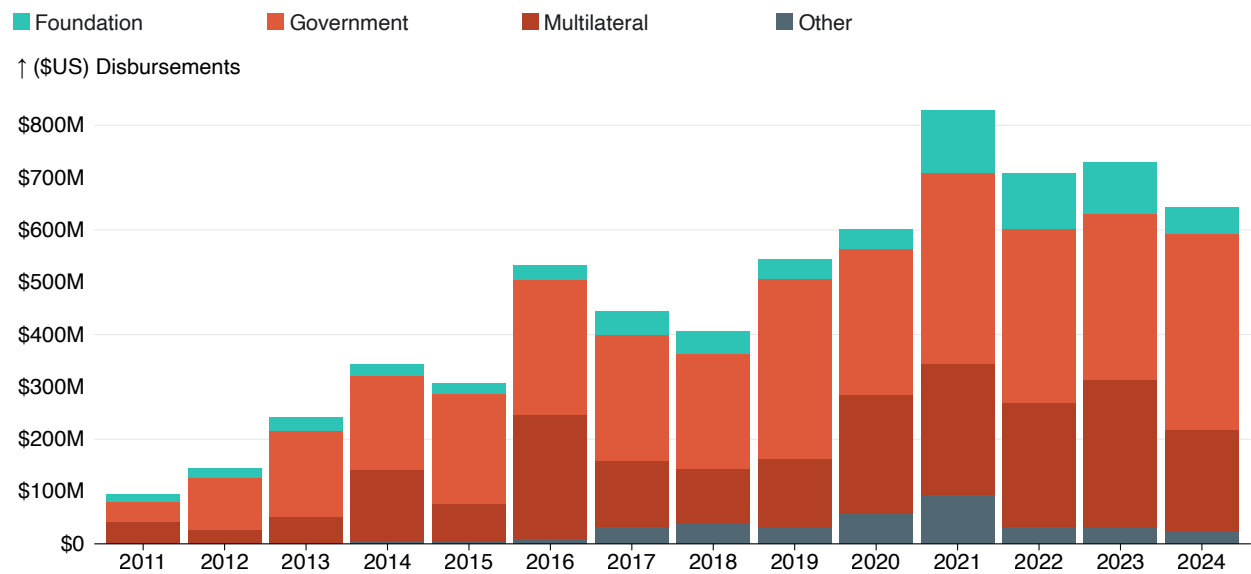
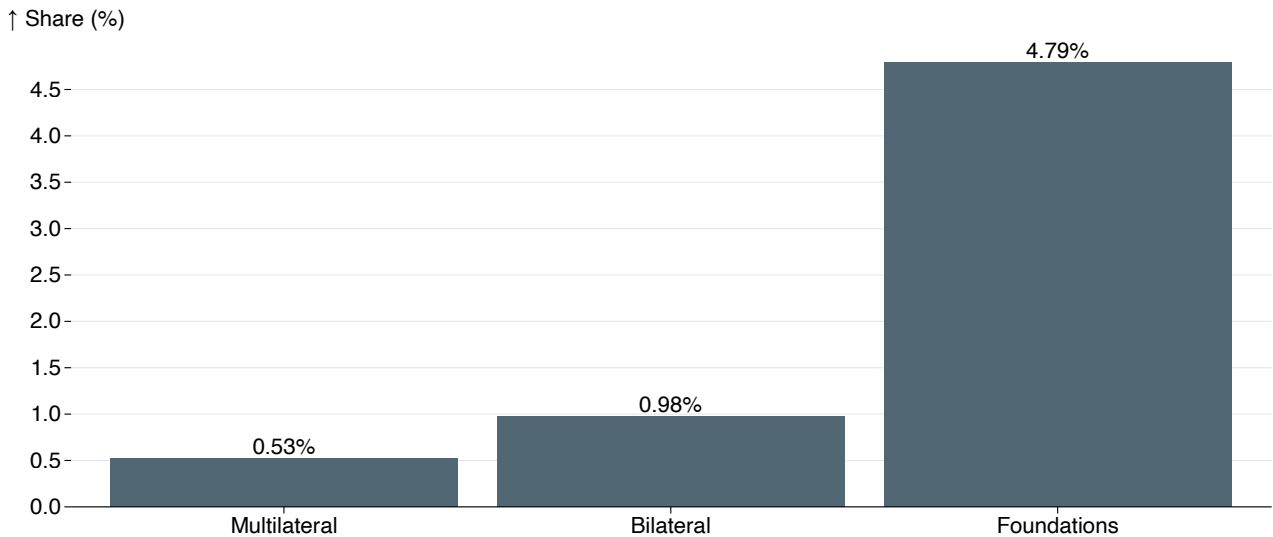


FIGURE 2 | IP, LC, and ADP Tenure Rights as a Share of Total Climate Finance

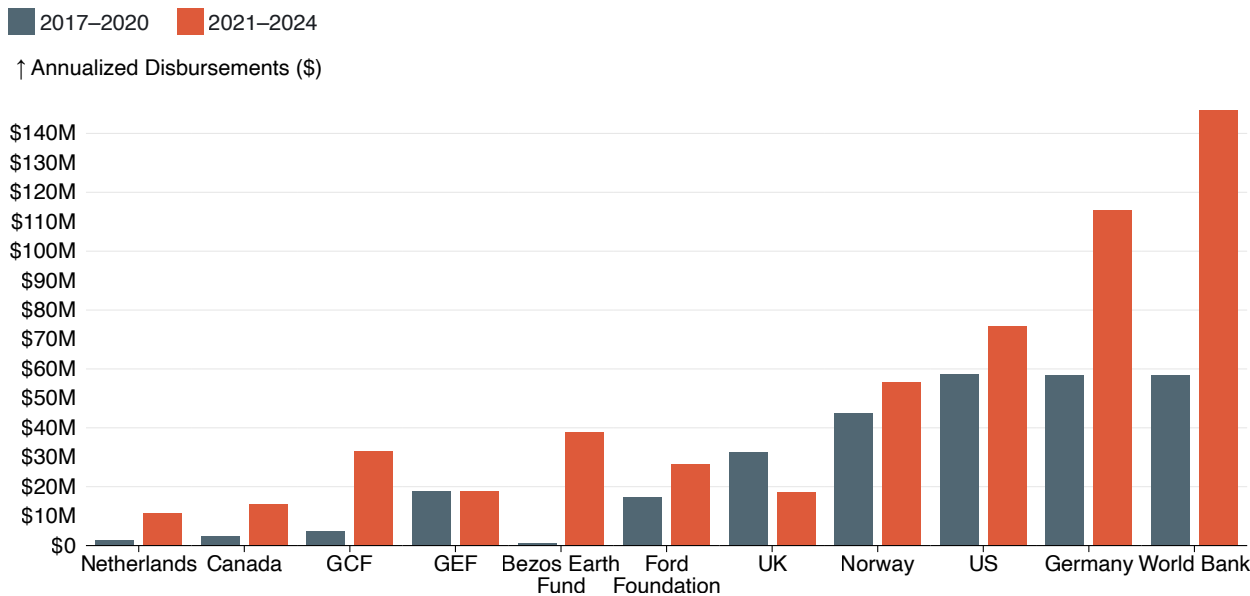


Note: Represents total share of climate finance from 2019 to 2023.

Sources: Total climate finance figures (denominators) are sourced from Indufor analysis of (1) Foundations: ClimateWorks Foundation. 2024. [Funding Trends 2024 – Climate Mitigation Philanthropy](#). [Figure 3 excluding funding to U.S. and Europe] (2) Bilateral and Multilateral ODA: OECD. 2024. Climate Finance Provided and Mobilized by Developed Countries in 2013-2022. Climate finance for multilateral and bilateral donors is only available through 2022, while foundation data is available through 2023. Accordingly, we compute bilateral and multilateral shares over 2019-2022, and foundation shares over 2019-2023.

Since 2021, several key donors have sharply increased their disbursements for IP, LC, and ADP tenure rights. The World Bank and Germany now provide about \$148 million and \$114 million per year, respectively (more than double their 2011–2020 averages). Together, they account for over 36 percent of IP, LC, and ADP tenure rights financing from 2021 to 2024. Multilateral climate mechanisms (GEF, GCF) and new private foundations (e.g., Bezos Earth Fund)¹⁰ each more than doubled their funding compared to pre-2021, while Canada, Norway, and the Ford Foundation have shown more modest but still significant growth.

FIGURE 3 | Annual Average Funding for IP, LC, and ADP Tenure, 2011-2020 Compared to 2021-2024

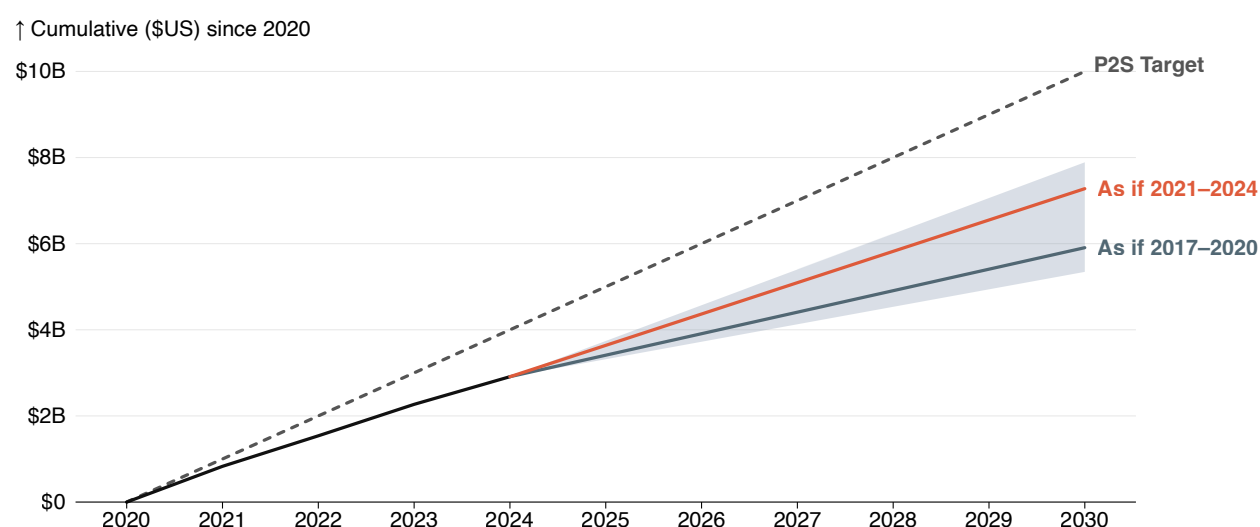


The trend of increasing funding is particularly strong among FTFG donors, showing the effect of this collective commitment on individual donor’s disbursements. Overall, FTFG members have increased their collective annual disbursement by 47 percent relative to 2017-2020, and 112 percent relative to 2011-2020. From 2021 to 2024, FTFG donors directly reported \$1.4 billion (current USD) in disbursements and expenditures. Although FTFG annual reports use a mixture of commitments and disbursements (among other methodological differences), **at current trajectory FTFG donors are on track to meet or exceed the original \$1.7B pledge of committed funding.**¹¹

Because many bilateral-funded projects are still mid-implementation, the headline figures reported by FTFG can obscure the delay before resources reach frontline organizations. Future reporting should therefore include not only the split between “committed” and “disbursed” funds but also update on ongoing project progress. This would give Indigenous and local partners a clearer basis to plan and to track real-world outcomes.

While donor attention and funding for IPs, LCs, and ADPs have scaled up significantly since 2020, donors are not on track to reach the Path to Scale targets. Starting in 2020, the Path to Scale—an informal initiative that aims to scale-up global ambition to legally recognize the land and resource rights of IPs, LCs, and ADPs—set a target of \$10 billion by 2030 to secure an additional 400 million hectares of tropical forest under the stewardship of IPs, LCs, and ADPs.¹² Maintaining the current pace of disbursements (annual average of 2021-2024) over the next five years, we project that without catalyzing additional investment, donors will fall short of this target by \$2.9 billion.¹³ Figure 4 shows that maintaining 2021’s peak annual rate would still leave a \$2.1 billion gap, while a return to pre-Pledge levels would expand the shortfall to \$4.7 billion.

FIGURE 4 | Progress Towards Path to Scale Target 2: Mobilize \$10B Cumulative



Note: Projection for 2025–2029 highlights two pathways: (1) As if funding continues at the rate of 2021-2024, or (2) if funding returns to 2017-2020 levels. Upper bound for the projection is as if funding at the highest series annual rate (2021), and lower bound is lowest annual series rate (2018). Assumes funding target continues through 2030.

Cuts in bilateral aid risk reversing progress and widening the funding gap towards the 2030 target. Ongoing cuts and shifts in international aid following the closure of USAID and reorientation of public budgets in Europe towards security threaten to reverse the progress in funding for IPs, LCs and ADPs described above. The cuts in US international aid (see box) are by far the most dramatic and material, but these impacts could be exacerbated by other donors retreating, such as recent decisions by the UK to scale back its aid budget, along with reductions announced by European donors such as Germany, Belgium, France, Switzerland, and the Netherlands.¹⁴

The full impact on funding for IPs, LCs, and ADPs remains unclear and will depend on broader global trends and the actions of other bilateral donors, but contractions in international aid represent a significant risk. Bilateral donors contributed 58 percent of funding for IP, LC, and ADP tenure rights in

2024. Overall, the OECD projects up to a \$35 billion decline in global ODA this year, with future outcomes uncertain.¹⁵

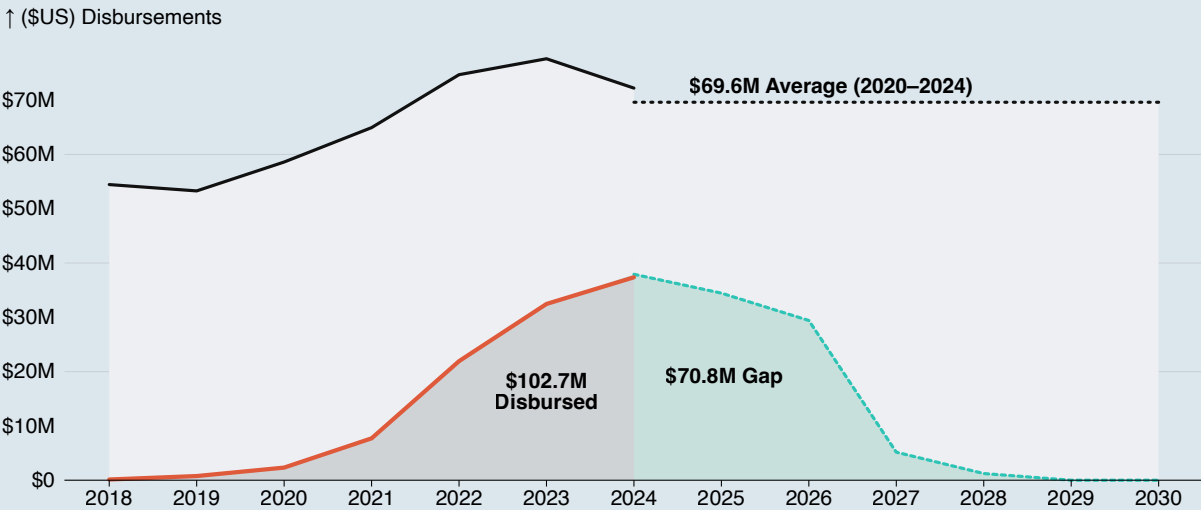
USAID – An Emerging Funding Gap

The retreat of USAID from international development aid represents one of the most significant shocks to the international aid system in decades, with acute impacts to funding for IPs, LCs, and ADPs. Beginning in January 2025, the U.S. government announced the shuttering of USAID, bringing more than six decades of international support to a close and leaving significant active funding commitments unfulfilled.¹⁶

Historically, USAID has been the largest bilateral donor to IP, LC, and ADP tenure rights (though annual disbursements by Germany have surpassed USAID’s in recent years). Since 2011, USAID has provided \$747 million in cumulative support—representing approximately 12 percent of the total global funding over that period.

USAID’s exit creates two gaps: 1) undisbursed commitments to active projects that were cancelled, which based on publicly reported budgets will impact disbursements through 2029, totaling \$70.8 million (current USD); and 2) the loss of future annual flows. Using the recent five-year average of \$69.6 million per year in USAID funding (2020-2024), this implies a cumulative shortfall of approximately \$394 million from 2025 to 2030, after crediting the \$24 million disbursed by USAID in 2025. This gap is equivalent to approximately four percent of the Path to Scale \$10B target.¹⁷

FIGURE 5 | Historical and Projected IP, LC, and ADP Tenure Rights Funding by USAID, 2018-2030



Note: Black solid line are actual disbursements by USAID, orange solid line are disbursements as part of cancelled projects, with blue dashed line indicating the remaining projected disbursements for those projects (adjusted for the relevant share). Black dotted line indicates the 2020 to 2024 annual disbursement average projected to 2030.

In addition to its role as a donor, USAID played a leading role (alongside Norway, Germany, and the UK) in shaping how tenure rights intersected with broader development and climate priorities. It was the first bilateral donor to adopt explicit “localization” targets in 2021, committing 25 percent of USAID funds to flow directly to local organizations by 2025, and 50 percent of programs to have local leadership by 2030. By 2024, all USAID funding had doubled its share of financing to local non-governmental or private sector partners, a shift mirrored in the share of projects that mention an Indigenous Peoples Organization (IPO).¹⁸

The exit of USAID leaves gaps that extend beyond the immediate loss of resources. To sustain progress, donors must:

- **Fill the financial gap:** To fill the gap left by USAID’s \$69.6 million annual disbursements, other bilateral donors will need to scale up their financial support, while multilateral funds and philanthropies must expand their portfolios to prevent an overall contraction in resources
- **Replace policy leadership:** USAID championed localization and the integration of land tenure into broader development, climate, and biodiversity agendas. With its absence, other bilaterals and multilateral institutions will need to carry forward this advocacy role to keep the localization agenda visible in global negotiations and financing frameworks. Path to Scale’s 2024 report, *Localizing Bilateral Finance for Community Rights*, offers specific recommendations for how bilateral institutions could strengthen localization—with many of them tailored to USAID’s role.¹⁹ In USAID’s absence, these recommendations now provide a roadmap that other bilateral and multilateral donors should adopt to ensure localization remains central in global funding and policy frameworks.

Regional Funding Trends

Donor funding to Africa and Asia has expanded, but slowing momentum and potential cuts risk reversing progress

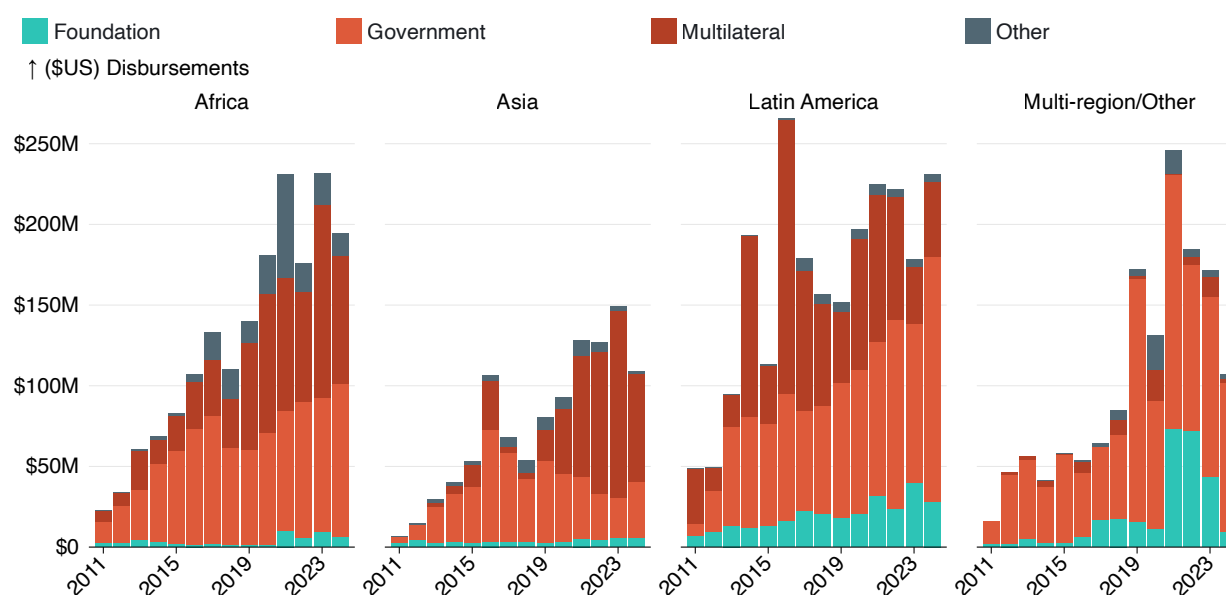
The post-Pledge period has brought progress toward a more balanced regional distribution of funding, particularly for Africa and Asia, but signs of slowdown are emerging. Historically, donor funding was largely concentrated in Latin America, but the Pledge catalyzed more rapid growth in other regions. While funding increases have leveled off in Latin America and not matched the growth rate of Africa or Asia, all regions have witnessed some level of growth over the last four years. In 2023 and 2024, the rate of growth in disbursements has leveled off across all three regions, reflected by the 23 percent decline in global funding since 2021.

In Africa, disbursements have stabilized at a higher level, averaging \$208 million annually from 2021–2024 (48 percent above the prior four-year period) driven largely by major World Bank and GEF projects. Asia, by contrast, saw steady growth from 2018 onward, only to experience a sharp 27

percent decline in 2024 as several large multilateral projects concluded or slowed down, pulling total funding back towards pre-Pledge levels.²⁰

Although foundations remain more heavily invested in Latin America than in Africa or Asia, the share of their total funding going to Africa grew significantly between 2021 and 2024.²¹

FIGURE 6 | IP, LC, and ADP Tenure Rights Disbursements by Continent, 2011-2024



Note: Because a large share of multi-region funding includes Latin America, Latin America's disbursements are likely undercounted in this graph.

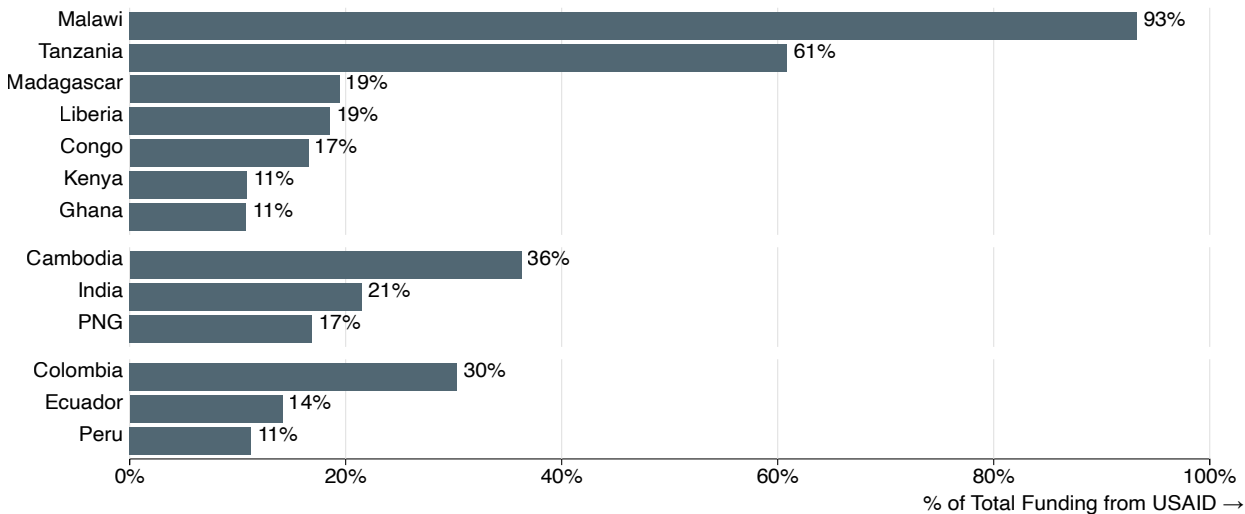
Funding has closely mirrored opportunities to protect collective land and forest rights—the 16 countries receiving the most funding account for nearly 60 percent of global tropical forest area.

Funding in these countries has historically been highly durable, with these 16 countries consistently receiving over \$10 million per year since they first surpassed that threshold. On the margins, the pledge has also expanded the number of countries receiving funding for IP, LC, and ADP tenure rights, with a total of 74 countries having received more than \$1 million in funding in a year from 2011 to 2024.

The tightening international aid environment will have broad impacts, but some countries and regions are likely to be affected more than others.

Figure 7 below shows the share of each country's total funding since 2020 that has come from USAID. Most countries that will be impacted are in Africa—nearly all of Malawi's \$11 million in IP, LC, and ADP funding since 2020 has come from USAID, and 61 percent of Tanzania's \$30 million. Colombia, however, is the country with the greatest absolute exposure to USAID cuts, with \$89 million from USAID since 2020 (30 percent of the country's total tenure rights funding).

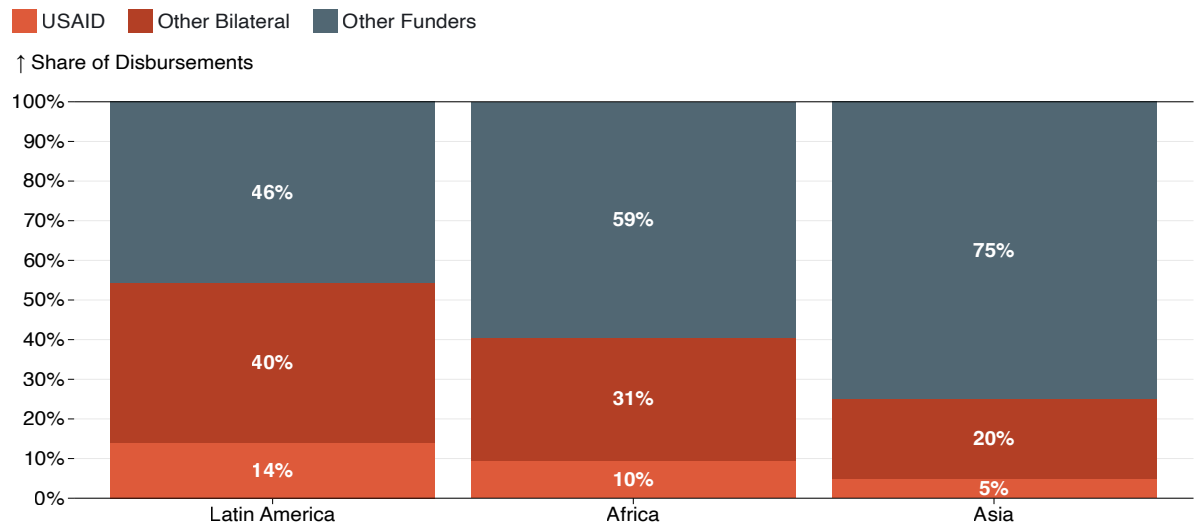
FIGURE 7 | Country Share of IP, LC, and ADP Tenure Rights Funding from USAID, 2020-2024



Note: Multi-country projects are evenly allocated unless otherwise stated by public data. Uses 2020 to 2024 to align with USAID projections.

By region, Figure 8 shows that Latin America is the most exposed to cuts from USAID, which accounted for 14 percent of its total funding from 2020-2024. It also received the highest share of its funding from other bilateral donors (40 percent), indicating greater exposure to future reductions in the broader international bilateral aid. Over the longer term, these cuts signal the risk of further constraints on multilateral funding if bilateral donors limit future replenishments.

FIGURE 8 | Regional Share of IP, LC, and ADP Tenure Rights Funding from USAID and Other Bilaterals, 2020-2024



Funding Gaps for IP, LC, and ADP Women's Organizations

Our data shows a meaningful increase in funding for IP, LC, and ADP tenure rights, but it remains unclear how, and to what extent, the women within these groups have directly benefited from the increased flows of funding. A lack of gender-disaggregated data across donor reporting makes it difficult to assess the scale of resources reaching women's grassroots organizations, who have long been excluded from equitable access to resources and decision-making at territorial, national, and international levels.

In an effort to address this gap, RRI, in collaboration with the [Women in Global South Alliance \(WiGSA\)](#), recently produced a study to analyze the level and characteristics of funding accessed by women's organizations in the WiGSA network from the bottom up. The study incorporated the voices and experiences of network members via a multilingual online survey, focus group, and three qualitative case studies. WiGSA's membership spans Africa, Asia, and Latin America, providing a global view of how funds reach IP, LC, and ADP women.

The authors found that:

- **Budgets of IP, LC, and ADP women's organizations are small and uneven.** Across the WiGSA network, the median annual budget grew from \$273,000 in 2023 to \$338,000 in 2024, yet nearly a third of organizations still operate on less than \$100,000 per year.
- **Needs far exceed resources.** In 2024, the median actual budget was \$338,000, while the median “fit-for-purpose” budget identified by organizations was \$717,500—a gap of more than 50 percent.
- **Core, flexible support is scarce.** More than half (53 percent) of organizations reported that none or less than 10 percent of their budget was core funding—leaving little room for long-term planning, hiring staff, or investing in organizational growth.
- **Financial reserves are limited.** Most organizations said they could only operate for 1–3 months without new funds, and 21 percent could not cover even a single month.
- **Funding channels reinforce dependence.** Half of all organizations identified international NGOs and networks as a principal funding source, followed by philanthropies and bilaterals. Only a handful cited feminist funds or UN agencies, and almost none reported significant support from national governments.

The analysis makes it clear that IP, LC, and ADP women's organizations face structural deficits in flexible and long-term support, leaving them in cycles of financial instability that undermine sustainability and autonomy. Yet case studies in the report also highlight their resilience, broad reach, and proven capacity to deliver impact when given trust-based, institutional funding. Looking forward, donors are urged to reconfigure funding architectures to be “fit for purpose”: prioritizing multi-year, flexible support, co-designing with women's organizations, addressing persistent racial and gender inequities, and shifting from control to partnership.

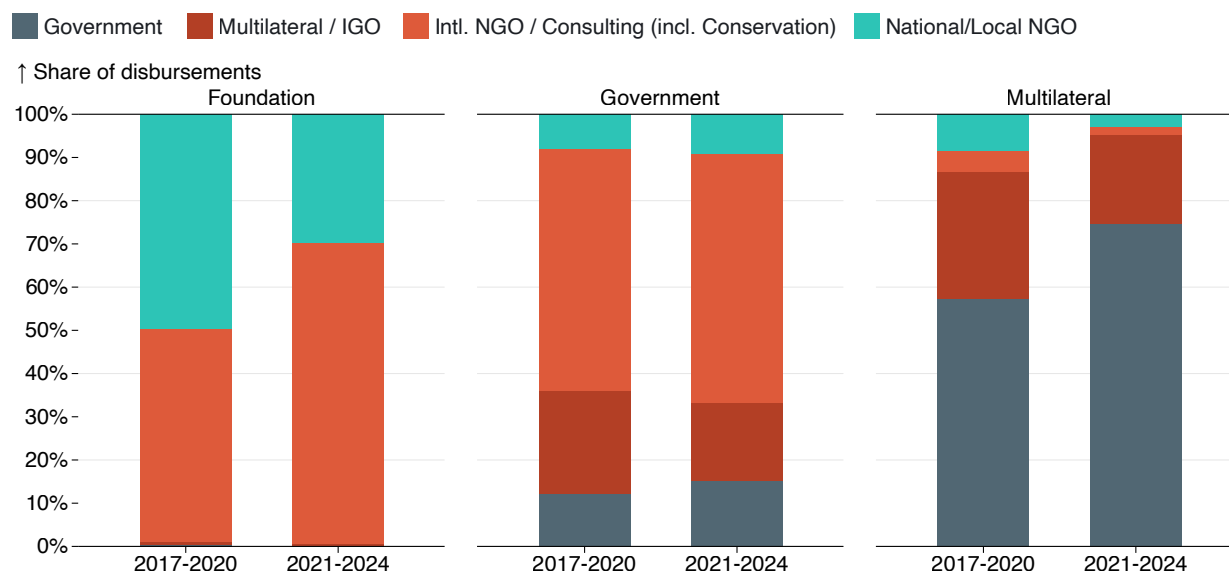
Trends in Funding Mechanisms and Pathways

Groundwork laid for direct support, but funding will need to scale across all pathways to meet global goals

While increasing overall levels of funding is critical to delivering on the Path to Scale targets, the way resources are delivered matters just as much as the amount. A growing body of evidence shows that funding practices—who receives funds, through what channels, and with what degree of local ownership—determine whether finance strengthens tenure rights and supports community-led conservation or instead reinforces existing bottlenecks and inequities.²² The current moment calls not only for more funding, but also for donors to re-engineer their practices to ensure finance is accessible, equitable, and fit for purpose.²³

Figure 9 shows the share of funding directed to four types of implementing organizations in the four-year period prior to and during the Pledge. This shows that foundations, during a period of rapid growth in overall funding levels after the Pledge, have directed a larger share of funding to larger international NGOs. New donors entering the space have relied on known institutions perceived as capable of disbursing large amounts of funding. Funding to national or local NGOs has not declined—the increasing share to international NGOs instead represents an expansion of total funding from private foundations.

FIGURE 9 | Evolving Share of Primary Implementing Organization by Donor Type, 2017-2020 Compared to 2021-2024



Multilateral donors directed more resources to national and local governments during this period, primarily through large-scale state-led titling and land reform efforts. Bilateral donors remained steady in their reliance on international NGOs and multilaterals as implementing partners.

Although there have been limited shifts in the global practices of bilaterals and multilaterals, their continued funding of structural reforms at national and regional scale (e.g., land titling, registries, and legal frameworks) sets the enabling environment for the durability of rights. These system-level investments will be particularly critical in the context of the forthcoming FCLP-led intergovernmental land tenure commitment, which will require coordinated government action alongside expanded community-driven finance (see Box below).

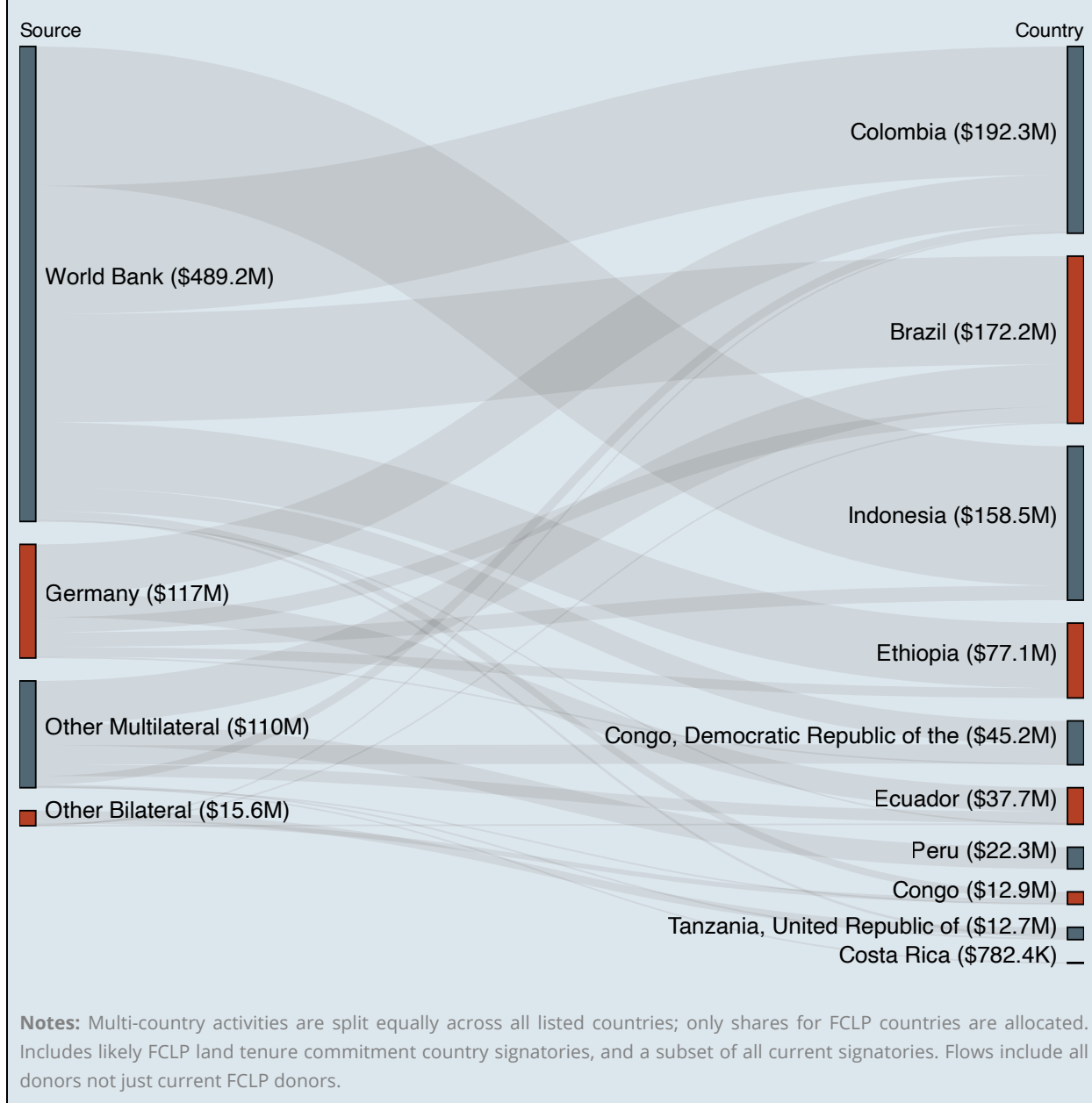
The FCLP Intergovernmental Land Tenure Commitment

At COP30, the FCLP is expected to announce a new Intergovernmental Land Tenure Commitment focused on advancing recognition and security of land and resource rights for IPs, LCs, and ADPs.²⁴ The effort, spearheaded by Brazil, Peru, and Norway, could mark an historic commitment by Global North and South governments to secure land rights at scale. Delivering this commitment will require system-level reforms related to land titling, registries, cadaster modernization, and legal frameworks. This means large-scale government-to-government finance will be needed, as multilateral development banks and government agencies have the mandate and capacity to set up these types of systems. At the same time, there are continued calls to scale up direct funding so that IP, LC, and ADP organizations can pursue their territorial priorities with more autonomy and flexibility.

It is important not to blur these roles. IP, LC, and ADP organizations should not be expected to shoulder the burden of running national titling programs or other large administrative reforms, which fall within the scope of governments and multilaterals (although IPs, LCs, and ADPs should be intimately involved in shaping these processes). At the same time, more direct resources are also needed to strengthen their territorial governance, support sustainable livelihoods, and advance locally defined development pathways—while governments and multilaterals deliver on the structural side. Moving forward, metrics monitoring donors in this space should focus on the absolute volume of direct funding reaching IPs, LCs, and ADPs, rather than just the share, so that grassroots and systemic investments are recognized as complementary rather than competing.

The current financing landscape for these systems-scale reforms remains highly concentrated. Figure 10 illustrates the distribution of funding to national and sub-national governments in FCLP signatory countries for IP, LC, and ADP tenure rights projects. Between 2011 and 2024, the World Bank provided 69 percent of all such funding to FCLP Global South governments, while Germany accounted for 16 percent. Combined, all other multilateral and bilateral donors contributed only 15 percent.²⁵ To meet FCLP commitments and strengthen enabling conditions for tenure rights at the national scale, a broader set of bilateral donors (and regional development banks) will need to engage directly with Global South governments to rebalance this ecosystem.²⁶

FIGURE 10 | Disbursements for Government-led IP, LC, and ADP Tenure Rights Projects, 2011-2024

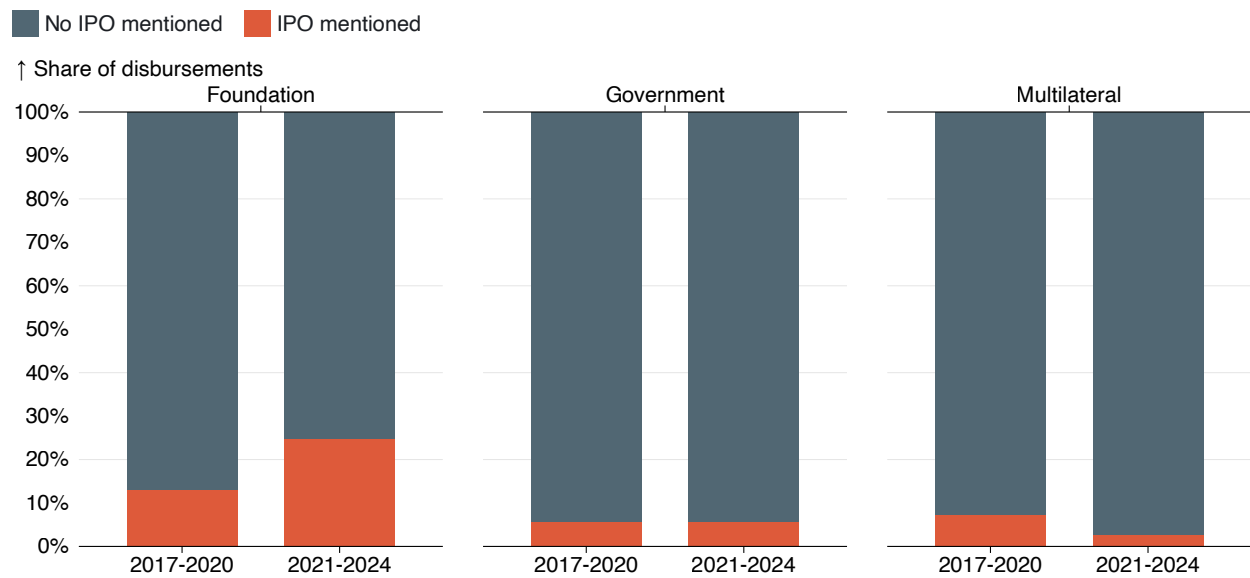


Even with continued reliance on international organizations and channels, the share of projects that directly name Indigenous-led organizations is increasing—particularly among foundations. Tracking direct funding to IP, LC and ADP organizations remains difficult due to incomplete public data and varying definitions over what constitutes direct funding. A proxy for the ‘directness’ of financial support is the share of disbursements tied to activities that explicitly mention

an Indigenous Peoples’ Organization (IPO).²⁷ This enables tracking funding ranging from direct support, fiscal sponsorship, to projects that are designed in an inclusive manner.

On this metric, foundations have approximately doubled their share from 13 percent in 2017-2020 to 25 percent in 2021-2024, while rapidly scaling up overall funding, leading to more than a 4x increase in funding mentioning an IPO in absolute terms. Bilateral and multilateral donors have remained between 3-7 percent across both periods, again with a rise between periods in absolute terms (Figure 11).

FIGURE 11 | Funding Mentioning an IPO by Reporting Organization Type, 2017-2020 Compared to 2021-2024



Foundations, among other donor types, not only directly fund IPOs, but have also provided early catalytic funding into IP, LC, and ADP-led and/or regranting mechanisms (e.g., Podáali Fund, the Nusantara Fund, Fondo Territorial Mesoamericano, CLARIFI) and supported proposal windows to help them mature.²⁸ These investments are only just beginning to emerge in disbursement data, but if successful, they will enable larger-scale, follow-on support in the coming years.

In addition, while foundations have also increased reliance on international NGOs and other intermediaries, they appear to be partnering and co-designing projects with IP, LC, and ADP organizations more frequently than in the past—suggesting improvements in locally-led design and inclusive priority-setting beyond direct finance.

Taken together, these trends point to a funding system that has expanded in size and laid the groundwork for more direct support, but has yet to undergo a fundamental shift in how

resources are delivered. The scale of funding is worth noting. Although over \$30 million has flowed into new IP, LC, and ADP-led funding mechanisms since the Pledge, multilateral and bilateral donors have channeled over \$1 billion in recent years to large-scale titling and tenure reforms.²⁹ While funding to both these pathways needs to be sustained and scaled up to ensure communities' tenure rights are secured and sustained, a particular focus on increasing IP, LC, and ADP-led funding is needed. The establishment of the TFFF and its 20 percent minimum allocation to IPs, LCs, and ADPs provides one opportunity to increase such funding,³⁰ but also shows the immediate need for sustained and increased investment in the groundwork required to make such funding genuinely direct.

Key Findings and Recommendations

Key Findings

- Since 2021, annual disbursements for IP, LC, and ADP tenure rights have averaged \$728 million per year, a 46 percent increase compared to the pre-Pledge period. However, funding peaked in 2021 and has declined every year since then, potentially signaling waning momentum.
- The COP26 IP and LC Forest Tenure Pledge was successful in mobilizing new resources for IP, LC, and ADP tenure rights funding, with over half of the global increase in funding since 2021 attributable to the Pledge signatories.
- While IP, LC, and ADP tenure rights funding has grown faster than overall climate finance, it remains less than one percent of climate-related ODA and philanthropy.
- Some major donors have doubled their funding for IP, LC, and ADP tenure rights since 2020, including The World Bank and Germany who now contribute over one-third of total annual disbursements. Several other multilaterals and some philanthropies have also doubled their contributions since 2020.
- Foundations dedicate a larger share of climate finance (4.79 percent) than bilateral and multilateral donors. Foundations have also increased the share of projects naming Indigenous Peoples' Organizations from 13 percent (2017–2020) to 25 percent (2021–2024), while bilateral and multilateral donors remain at 3–7 percent.
- National-scale titling and legal frameworks remain concentrated to World Bank and German funding, which together account for 85 percent of national, state, and local government-directed funding. Broader donor engagement is needed to support tenure progress and

forthcoming commitments, such as the anticipated Intergovernmental Land Tenure Commitment.³¹

- Without new investment, current trajectories leave a \$2.9 billion gap towards Path to Scale's \$10 billion target by 2030. Even at the 2021's peak disbursement rate, funding would still fall short by \$2.1 billion, while a regression to the 2017-2020 funding rate would leave a shortfall of \$4.7 billion.
- USAID's exit leaves a \$394 million cumulative shortfall toward 2030 and erases a champion of localization in aid delivery.
- Ultimately, the funding system has expanded in size and laid the groundwork for more direct support, but has yet to see a fundamental shift in how resources are delivered. Funding through international organizations and multilateral institutions still dominates, but more projects are showing signs of inclusiveness.

Recommendations

- Donors should renew their commitments through a new IP and LC Land Tenure Pledge at COP30, aiming to at least maintain the funding levels achieved after the COP26 Pledge. Our analysis suggests that donors should target at least \$2.2 billion to adjust for inflation and expansion into other non-forested terrestrial ecosystems.
- To fill the gap left by USAID, other donors need to scale up their financial support to prevent an overall contraction in resources. Bilateral and multilateral donors institutions will need to carry forward USAID's political leadership in advancing localization agenda.
- Donors both within and outside the Pledge should look at how their funding can support the Intergovernmental Land Tenure Commitment promoted by FCLP, Brazil, Peru and Norway.
- Donors should support the establishment of the Tropical Forest Forever Facility and the operationalization of its requirement to allocate 20 percent of disbursements to IPs, LCs and ADPs, to make sure this becomes a mechanism for large-scale direct funding to rightsholders.
- Donors and intermediaries should work towards giving longer-term, flexible support so that funding to new projects, countries and regions can work towards longer-term objectives and processes, recognizing that achieving tenure rights takes time.

Annex

Methodology

The Path to Scale dashboard builds on “[Falling Short](#)”, “[Funding with Purpose](#)”, and “[Forging Resilient Pathways](#)”, which have all attempted to quantify and describe trends in international donor funding to support IP, LC, and ADP tenure rights. The data is collected from publicly available sources including donor-reported microdata, grant databases, and the International Aid Transparency Initiative. We provide additional commentary where data gaps and areas for improvement in understanding exist. The full methodology, codebook, and reporting sources are available online [here](#).

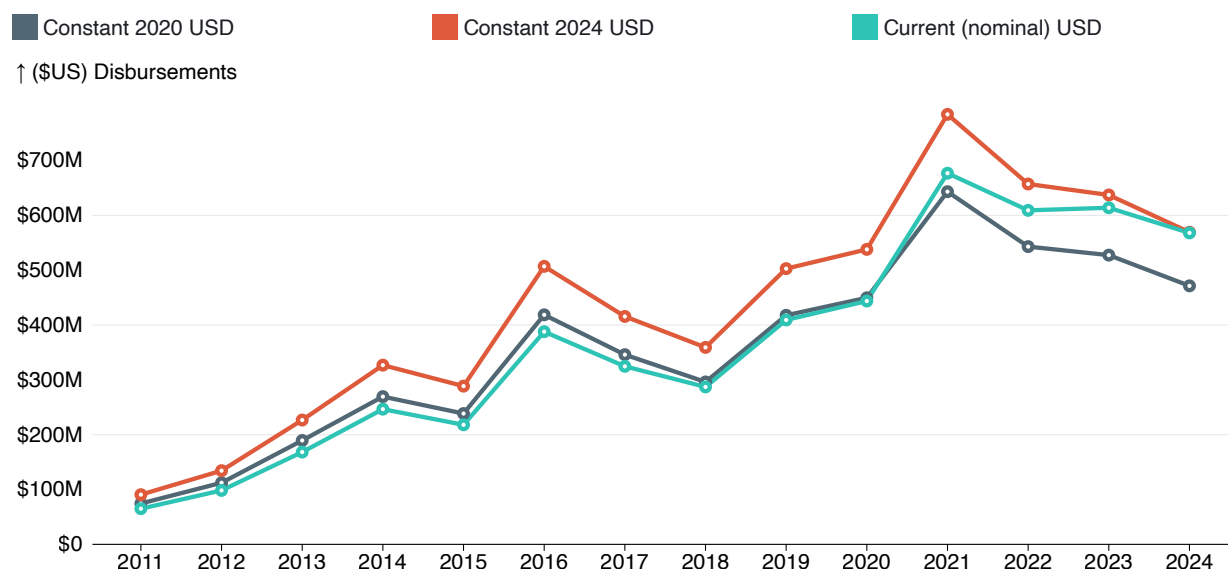
Our analysis employs a detailed, multi-step process to accurately review the dataset, which comprises over a million activities reported by donors. The unit of analysis is an ‘activity,’ aligning with IATI’s definition. Reporting organizations self-define activities, which may encompass multiple projects or workstreams under a single activity.

Initially we parse activity descriptions, titles, and associated documents for relevant keywords. Activities containing approved thematic and ecosystem keywords are then analyzed by a series of large language models (LLMs), which determine the semantic meaning of keywords in context. Following this automated review, our team manually inspects a subset of activities (over twenty-five thousand activity candidates)—all approved activities by the LLMs, and a sample that meets specific relevance criteria (i.e., activities by known donors or those containing significant keywords). For projects with disbursements exceeding \$5 million we review available budget documentation, mirroring the approach used in “Falling Short.” Information including project level notes, LLM review findings, and generated summaries are available at an activity level in the tracking tool.

We use a three-tiered process for supplemental data coding (i.e., including classifying implementing-organization types, expanding the ‘forest’ classification, refining geographic coding, and identifying activities that mention an Indigenous Peoples Organization). We begin with automated lookup tables using fuzzy matching to surface candidates; followed by an LLM that reviews each detection in context with a task-specific prompt; finally, our team manually validates the classifications. This workflow increases accuracy and consistency while reducing false positives.

The figure below benchmarks annual disbursements by price basis—current (nominal) USD, constant 2020 USD (the Falling Short benchmark), and constant 2024 USD (this report). Switching to the 2024 base raises totals by approximately 20 percent compared to the 2020 base, with the largest effects in earlier years. Going forward we will publish results on three bases: constant USD using the report year (e.g., 2024), the legacy constant-2020 benchmark, and current USD. All data and figures are available online in constant-2024 and nominal USD.

FIGURE 12 | Annual Disbursements for IP, LC, and ADP Tenure Rights Projects by price basis (nominal, constant 2020 USD, constant 2024 USD), 2011-2024



Definitions

Constant 2024 USD (this report): For each transaction, convert to USD at the annual-average FX rate of its transaction year, then restate in 2024 purchasing power using an OECD-aligned annual deflator; aggregate by the transaction’s calendar year.

“Falling Short” (constant Dec-2020 USD): Convert to USD using the same annual-average FX, then deflate each transaction to December 2020 prices (monthly CPI index); aggregate by calendar year.

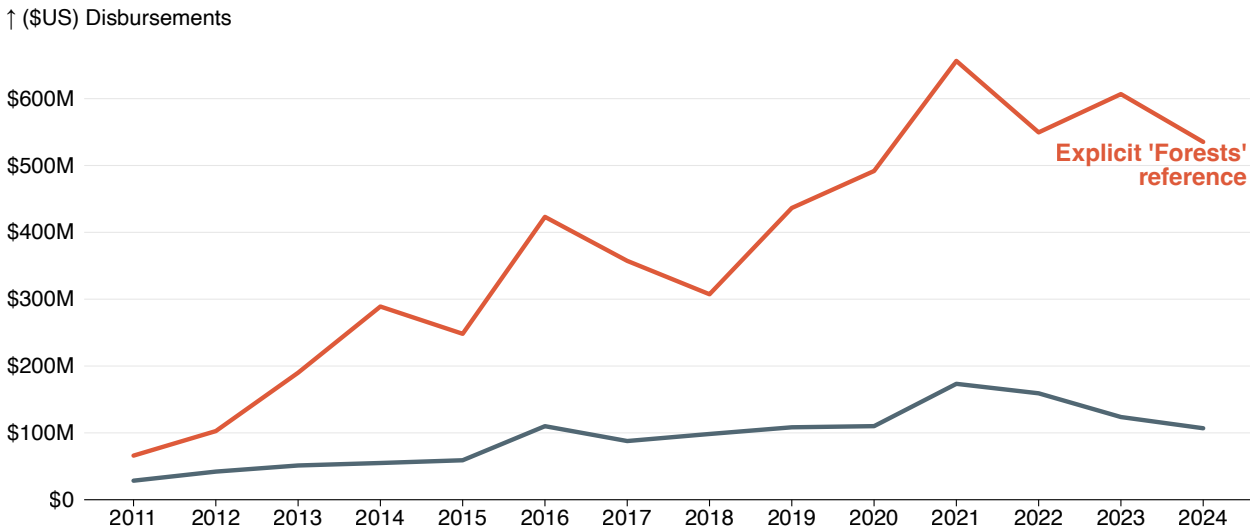
Expanded Ecosystems Baseline

For the first time, the State of Funding report includes funding for IP, LC, and ADP tenure rights outside of forest ecosystems. This broader scope captures the stewardship of grasslands and savannas, rangelands, peatlands and other inland wetlands, and mountain systems—landscapes that hold critical climate and biodiversity value, and that are managed by IPs, LCs, and ADPs whose governance systems and cultural practices sustain them.

Because donor reporting varies, we adopt an expansive definition of “forests” to preserve comparability across the baseline and expanded scope. Beyond forest-related keywords (including mechanisms and institutions), we incorporate references to specific forest basins and geographies

and other contextual signals. As above, we apply the same three-tier process—automated matching, LLM in-context review, and manual validation—to augment keyword-based classification.

FIGURE 13 | IP, LC, and ADP Tenure Rights to Forest and Other Terrestrial Ecosystems, 2011-2024



Since 2011, 80 percent of funding for IP, LC, and ADP tenure rights has gone to forest ecosystems. This share has been consistent over time, rarely deviating from a 78-82 percent share in each year.

Notes

¹ Rights and Resources Initiative & Rainforest Foundation Norway. State of Funding for Tenure Rights and Forest Guardianship Donor Funding for Indigenous Peoples, Local Communities, and Afro-Descendant Peoples in Tropical Forested Countries (2011–2023); RRI & Rainforest Foundation Norway. 2022. Funding with Purpose A Study to Inform Donor Support for Indigenous and Local Community Rights, Climate, and Conservation; Rainforest Foundation Norway. 2021. [Falling Short: Donor funding for Indigenous Peoples and local communities to secure tenure rights and manage forests in tropical countries \(2011-2020\)](#).

² UNFCCC. 2021. [COP26 IPLC Forest Tenure Joint Donor Statement](#).

³ OECD. 2025. [Cuts in official development assistance – OECD projections for 2025 and the near term](#).

⁴ The Forest & Climate Leaders' Partnership (FCLP). 2025. [Protecting Indigenous land is key to climate fight – leaders call for historic COP30 deal](#).

⁵ While prior versions have included landscape-scale projects that extended beyond forests, an explicit link to forests was required.

⁶ Grasslands and rangelands, which cover nearly half of the Earth's land surface and store roughly one-third of terrestrial carbon, are maintained through pastoralist traditions that balance mobility, grazing, and ecosystem health.

⁷ Due to data composition changes (e.g., expanding ecosystems, shifting to current 2024 USD) the attributable share to Pledge signatories varies from 2021-2024, but remains above 50 percent in all scenarios.

⁸ We have annualized our philanthropic funding flows based on average grant duration for donors that do not provide disbursement level data. This has the effect of normalizing recent years that experienced a rise in large, one time grants for multi-year projects from foundation donors.

⁹ Rainforest Foundation Norway. 2021. [Falling Short: Donor funding for Indigenous Peoples and local communities to secure tenure rights and manage forests in tropical countries \(2011-2020\)](#).

¹⁰ Notably, the Bezos Earth Fund was established in 2020.

¹¹ I.e., using nominal dollars, imputing a multilateral share for key bilateral donors, and walking forward multi-year projects. By mid-2025 FTFG donors have directly reported an approximately \$1.66 billion in expenditures and disbursements. For bilateral donors that have public activity budgets and timelines, we see that average project duration for active projects ranges from 3 to 10 years, and that most projects are approximately 50 percent complete based on projected budget totals.

¹² See the P2S website for targets <https://www.pathtoscale.org/targets>.

¹³ This is projected based on current trends from 2021 to 2024, as 2025 includes partial data we have used the average rate for 2025 to 2030. Target estimate is based on 2020 to the end of 2030, or \$909 million per year.

¹⁴ Organisation for Economic Co-operation and Development. 2025. [Cuts in official development assistance: OECD projections for 2025 and the near term](#).

¹⁵ OECD. 2025. [Cuts in official development assistance: OECD projections for 2025 and the near term](#).

¹⁶ Kates, J. et al. (KFF). 2025. [U.S. Foreign Aid Freeze & Dissolution of USAID: Timeline of Events](#).

¹⁷ Estimate assumes no further USAID disbursements beyond the \$24M reported in 2025; uses the 2020–2024 average to project future disbursement flows.

¹⁸ Still, progress started from a low base and remained well below Norway. From 2011-2024, about 17.5 percent of Norway's disbursements were under projects that included the mention of an IPO, versus 4.7 percent for USAID. See USAID. 2025. [Growing Momentum: USAID Localization Progress Report](#).

¹⁹ Path to Scale. 2024. [Localizing Bilateral Finance for Community Rights](#).

²⁰ This is particularly evident from a regional breakdown by donor type and country. Funding to Asia is more concentrated than other regions, with multilateral funding to Indonesia and the Philippines comprising two-thirds (39 percent to Indonesia and 26 percent to the Philippines) of all funding to Asia from 2021 to 2024.

²¹ This is partially reflected by new donors like the Bezos Earth Fund heavily investing in collective land rights and conservation work in Africa.

²² See, e.g., Path to Scale. 2024. [Localizing Bilateral Finance for Community Rights](#); Jose, J. K. 2025. Conservation funding at the local level. *Wildlife Letters*, August 2025, e70020. Wiley. <https://doi.org/10.1002/wll2.70020>; The Nature Conservancy. 2020. [Conservation financing for conservation programs with Indigenous Peoples and Local Communities](#).

²³ RRI and RFN. 2022. [Funding with Purpose: A Study to Inform Donor Support for Indigenous and Local Community Rights, Climate, and Conservation](#).

²⁴ FCLP. 2025. [Protecting Indigenous land is key to climate fight – leaders call for historic COP30 deal](#).

²⁵ Depending on the funding mechanism, contributions by some bilateral donors are reported as multilateral funding, for example projects funded by Norway, but channeled via the Amazon Fund. Therefore, the absolute contributions by some bilateral donors are higher than the 'other bilateral' category.

²⁶ This concentration reflects the nature of cadastre, titling, and regularization programs, where the World Bank Group has clear comparative and fiduciary advantages. Many bilaterals that co-finance the Bank advance legal and policy reforms through diplomatic channels and technical assistance rather than direct sovereign financing—for example, joining intergovernmental platforms, channeling TA via implementing partners or Bank-administered trust funds that work alongside line ministries, and using public diplomacy to move reforms.

²⁷ We refer to reporting organizations mentioning an IPO in the title, description, list of participating organizations, or other metadata.

²⁸ Publicly available funding data includes: Podáali – Indigenous Fund of the Brazilian Amazon (\$3.0M from Tenure Facility, \$0.4 million Ford): <https://thetenurefacility.org/article/supporting-and-growing-indigenous-led-funding-in-brazil-to-guarantee-territorial-rights/>; Nusantara Fund (\$3 million from Ford and Packard): <https://www.fordfoundation.org/news-and-stories/news-and-press/news/representing-millions-of-indigenous-peoples-and-local-communities-indonesian-organizations-join-movement-to-deliver-funds-directly-to-traditional-communities-worldwide/>; Fondo Territorial Mesoamericano (\$2 million from USAID): <https://rainforestfoundation.org/rainforest-foundation-us-wins-2-million-us-government-grant/>; Amazon for Life Fund – COICA (\$10.0M from IDB): <https://www.iadb.org/en/news/amazon-indigenous-organizations-strengthen-bioeconomy-capacities-idb-support>; CLARIFI – Community Land Rights & Conservation Finance Initiative (>\$14.0 million from Germany and Bezos Earth Fund): <https://www.clarifirights.org/>; FIRN – Rio Negro Indigenous Fund via FOIRN (>\$2.5 million from Norway) — <https://resultater.norad.no/avtale/BRA-23/0016>; IPAS — Indigenous Peoples of Asia Solidarity Fund (\$0.85 million from Ford): <https://www.fordfoundation.org/work/our-grants/awarded-grants/grants-database/indigenous-peoples-of-asia-solidarity-fund-ipas-fund-150593/>.

Other funds/IP-led mechanisms (lacking comprehensive public data, or under \$0.5 million): FIMA – Fondo Indígena Mujer Amazónica; Pawanka Fund; REPALEAC women's direct funding mechanism; AYNÍ Indigenous Women's Fund (FIMI); Indigenous Fund for Development with Identity; Babassu Fund (MIQCB); Rutî Indigenous Fund (CIR).

²⁹ Ibid.

³⁰ While the facility frames this allocation as “direct access,” the actual degree of directness—and the extent to which communities will exercise real control over resources—remains in flux and will depend on how implementation is designed and enforced.

³¹ NICFI. 2025. Norway is calling for global action on Indigenous rights in tropical forests. 1 July. <https://www.nicfi.no/2025/07/01/norway-is-calling-for-global-action-on-indigenous-rights-in-tropical-forests/>.