



Unlocking Global Gateway investments in nature and the green economy

Brussels, July 7-10



Nature-based tourism

Dr Anna Spenceley, Andrea Bacher & Marina Mugnano



Content

1. What is Nature Based Tourism?
2. Expert recommendations for NBT:
 - *Why to work on NBT*
 - *How to work on NBT*
3. NBT Financing
4. The Garamba Business Case

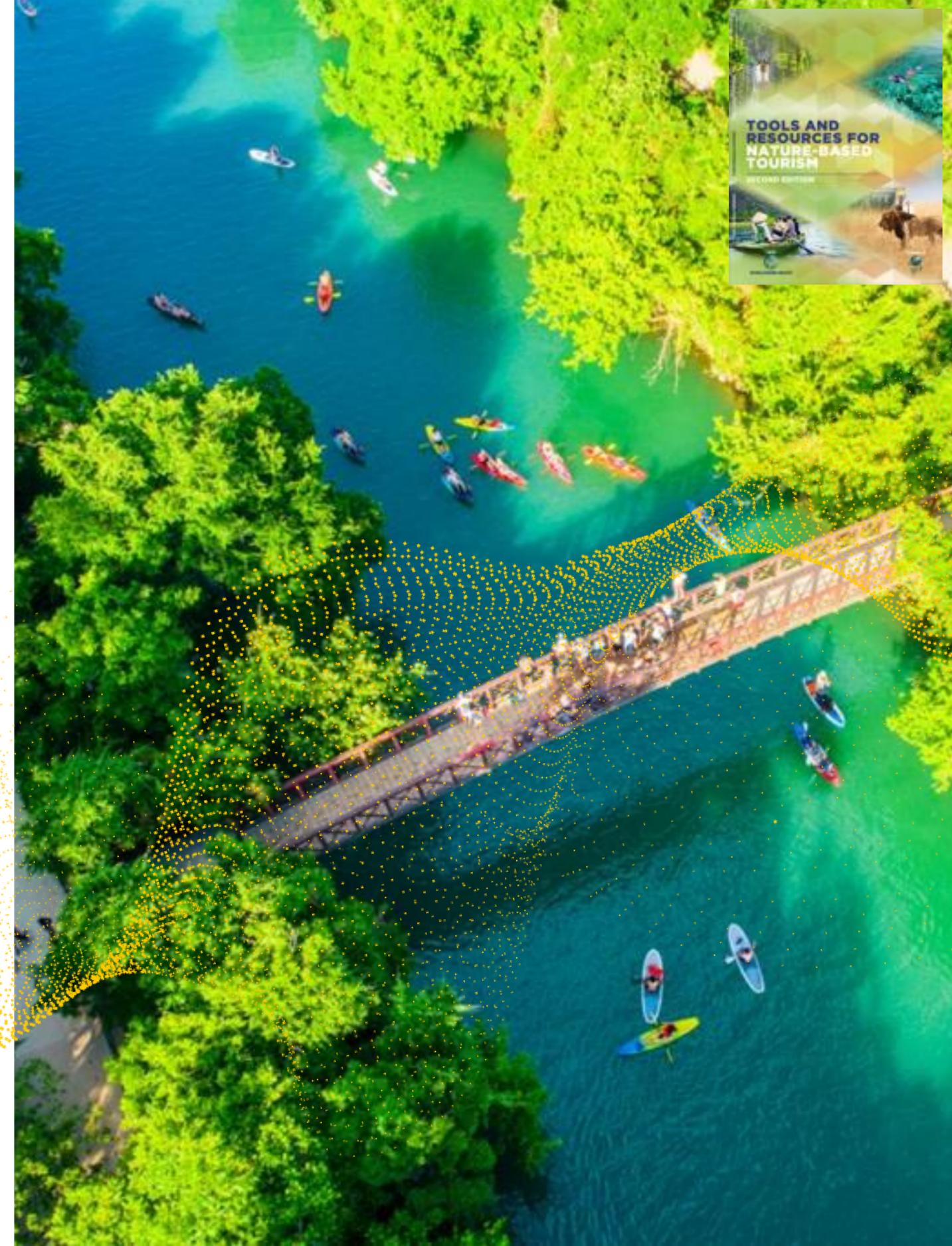


1. What is nature-based tourism?

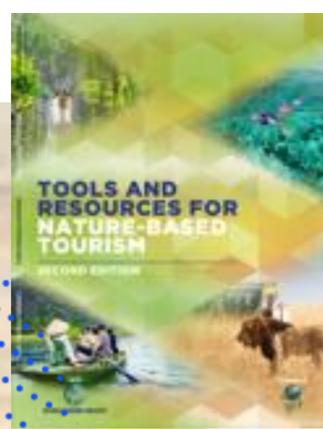
Forms of tourism that use natural resources in a wild or un-developed form.

Travel for the purpose of enjoying undeveloped natural areas or wildlife

NBT is predicted to generate US\$ 665 bn annually by 2030



Wildlife viewing



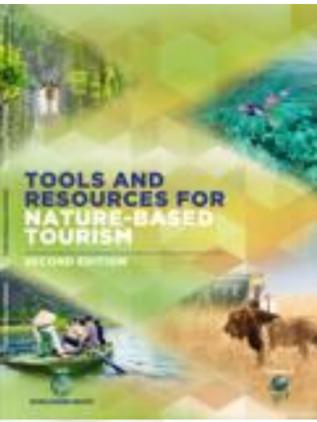
Landscapes and natural attractions



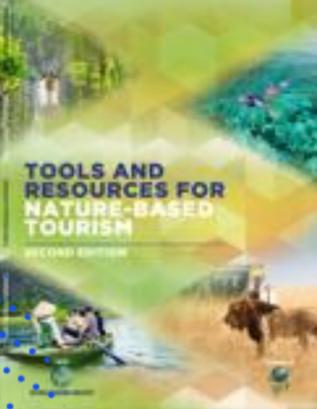
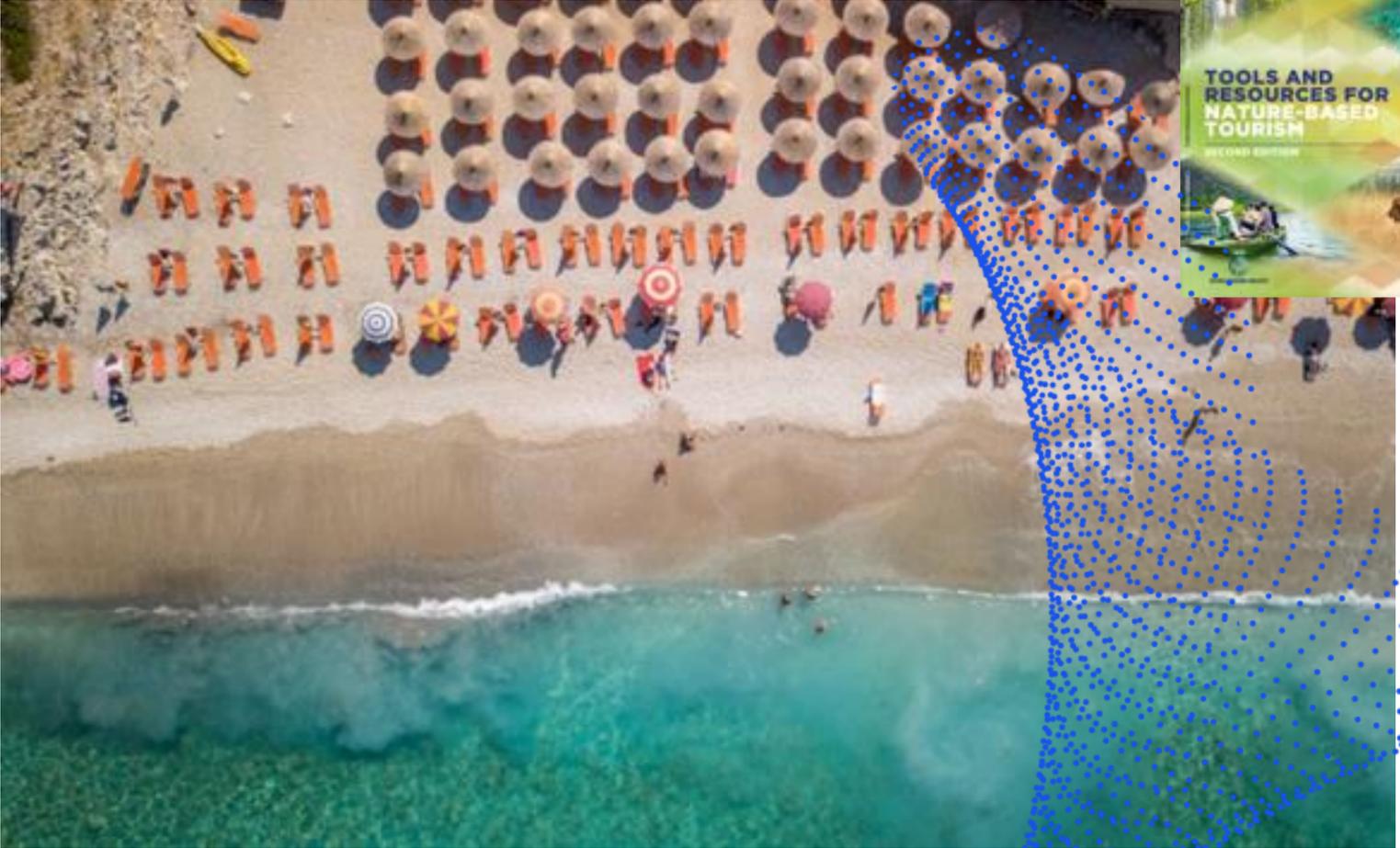
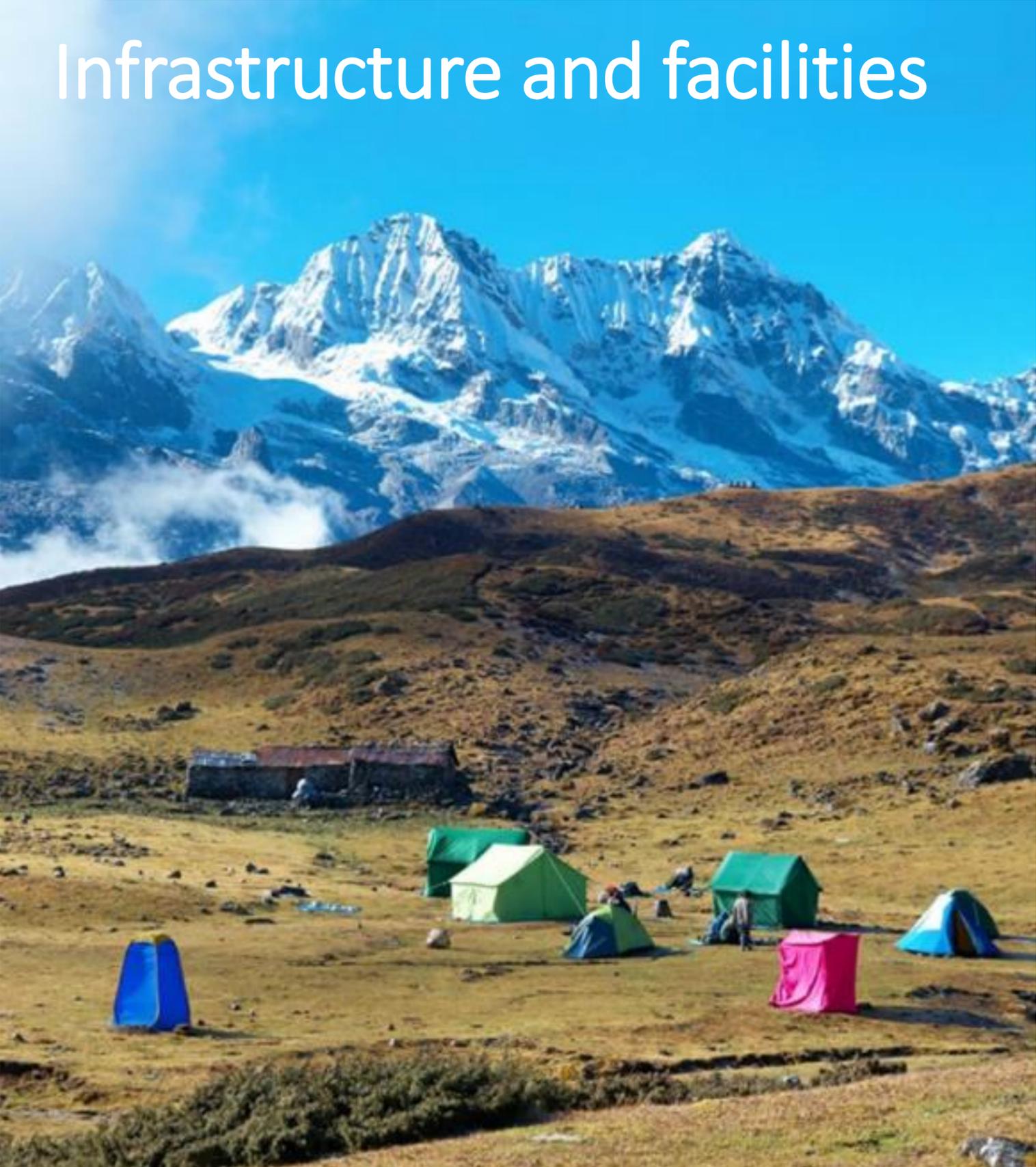
Nature and culture



Adventure



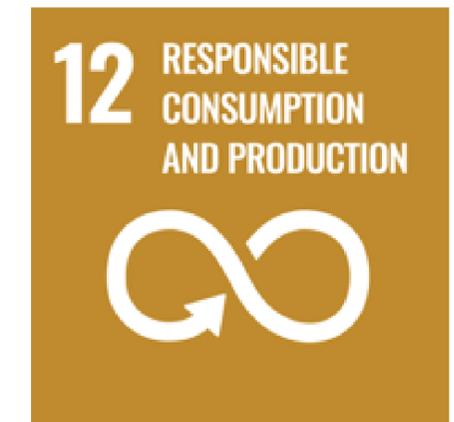
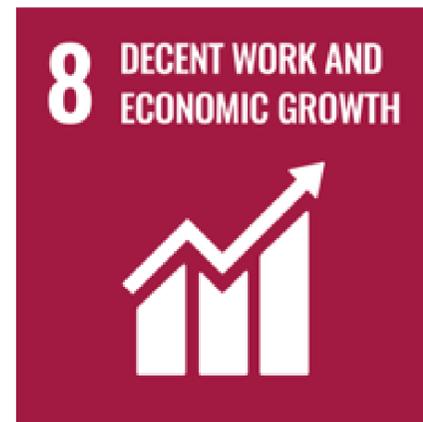
Infrastructure and facilities





<https://www.youtube.com/watch?v=OyyMtQp6lZY&t=97s>

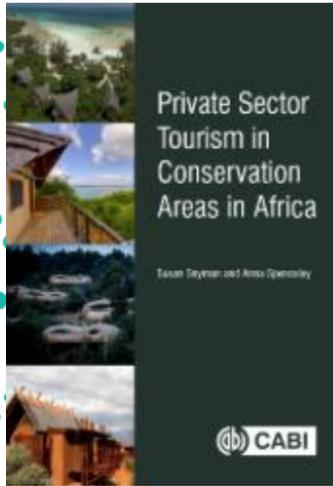
Nature-based tourism and the SDGS





Pafuri camp, South Africa

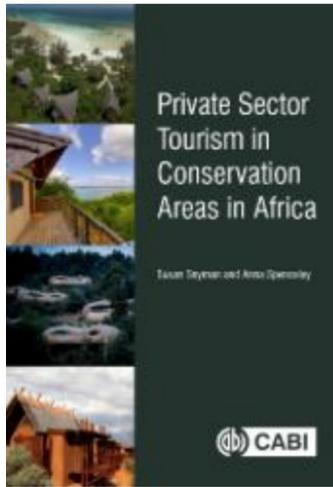
- Joint venture between community & Return Africa
- 52 permanent staff (94% from local Makuleke community)
- Salaries of USD98,000 wages + benefits annually
- Impact on poverty reduction





Xaus Lodge, South Africa

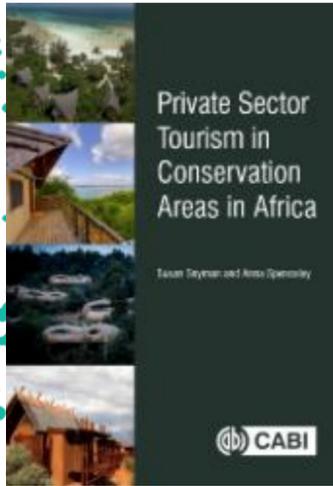
- Community-owned, managed by private sector – Transfrontier Parks Destinations
- 28 permanent staff (93% local)
- Staff salaries of USD 883,900 between 2008-2017
- Melissa Mienies: from cleaner to first female guide in Kgalagadi from community





Mombo Camp, Botswana

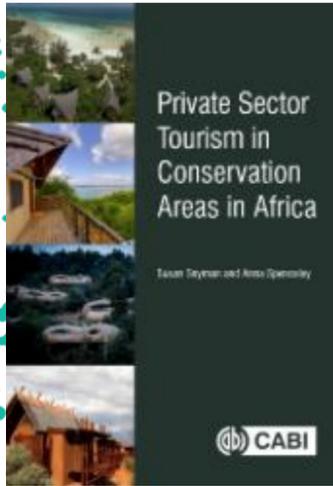
- Switch from diesel to 100% solar
- Capital investment of USD 860 k
- 93% reduction in carbon emissions (from 287 to 22 tonnes p/a)





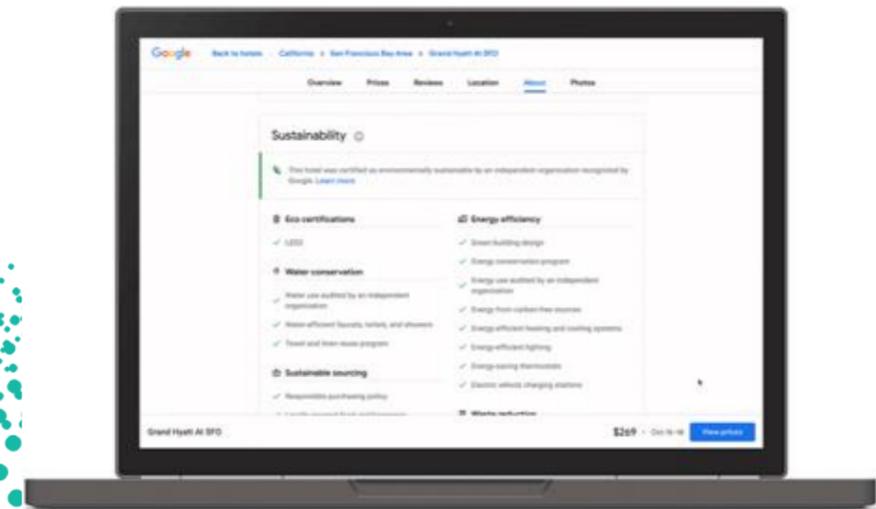
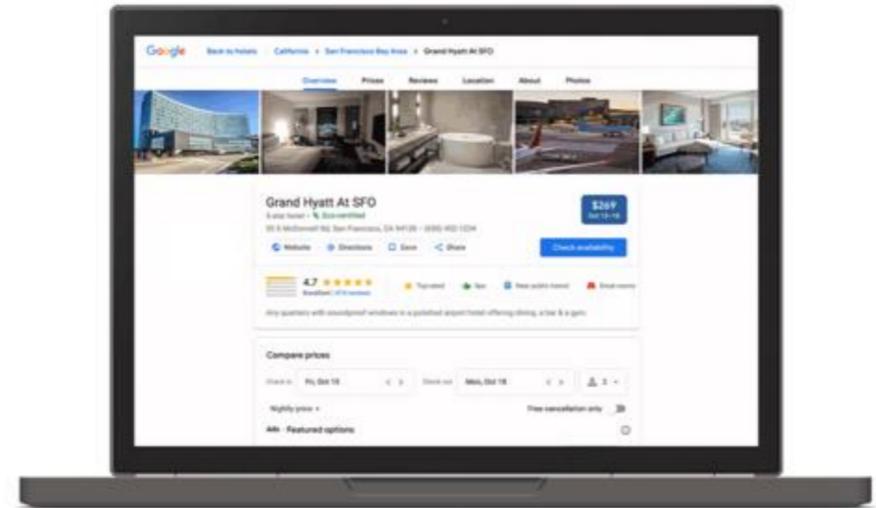
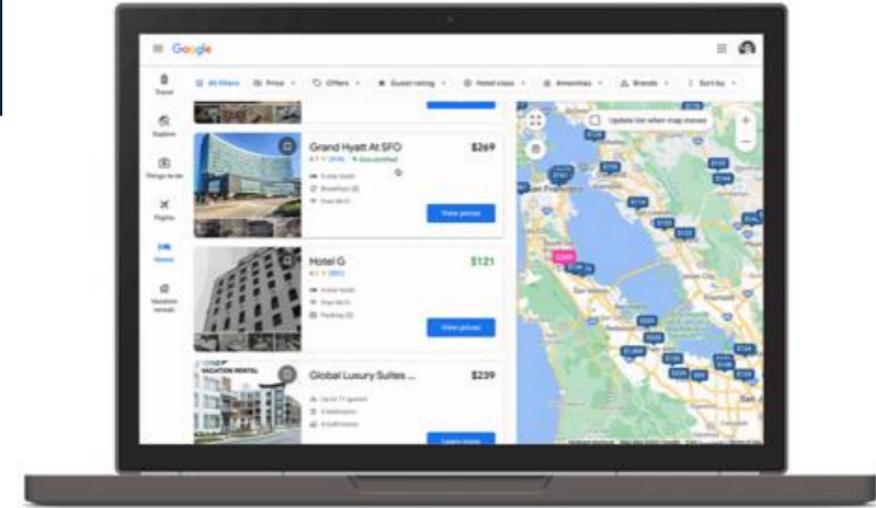
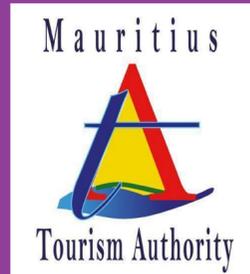
Nikwichi Lodge, Mozambique

- Created 120,000 ha conservation areas with 16 communities
- Regulate land use & stop hunting





Improved market access for sustainable operations



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2. Expert recommendations for NBT

Strengthening of regional nature-based tourism value chains



"Making nature healthy again is key to our physical and mental wellbeing and is an ally in the fight against climate change and disease outbreaks. It is at the heart of our growth strategy, the European Green Deal, and is part of a European recovery that gives more back to the planet than it takes away."

Ursula Von der Leyen, President of the European Commission



Funded by
the European Union

STRENGTHENING OF REGIONAL, NATURE-BASED TOURISM VALUE CHAINS

Deliverable 1:

Expert recommendations on *why* to work on nature-based tourism: An overview



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the European Union

STRENGTHENING OF REGIONAL, NATURE-BASED TOURISM VALUE CHAINS

Deliverable 2:

Expert recommendations on *how* to work on nature-based tourism:
Concrete actions

i Expert recommendations on **WHY** to work on nature-based tourism

No.	Section title
1	What is the importance of regenerative nature-based tourism to my country?
2	How is NBT relevant to European Commission priorities and global policies?
3	What actions can be taken to support regenerative nature-based tourism?
3.1	Actions to develop regenerative NBT in emerging high-potential destinations
3.2	Regenerative and greening actions for over-developed tourism destinations
3.3	Value chain actions in NBT destinations to strengthen local and international linkages
3.4	Actions and assessment of options for the use of financial instruments for regenerative NBT value chains
4	What steps can we take to design and implement successful NBT actions?
5	Annexes

How is NBT relevant to EC priorities?



EN

- Home
- About us
- Our priorities
- News and media
- Topics
- Resources
- Europe and you



A new plan for Europe's sustainable prosperity and competitiveness

Europe as a continent of economic growth, enterprise and innovation by ensuring competitiveness, prosperity and fairness.



Sustaining our quality of life: Food security, water and nature

Building a competitive and resilient agriculture and food system, safeguarding biodiversity, and preparing for a changing climate.



A global Europe: Leveraging our power and partnerships

Focusing on our wider neighbourhood to tackle global challenges and promote peace, partnerships, and economic stability.

How is NBT relevant to EC priorities?

The Global Gateway stands for sustainable and trusted connections that work for people and the planet. It helps to tackle the most pressing global challenges, from fighting climate change, to improving health systems, and boosting competitiveness and security of global supply chains.

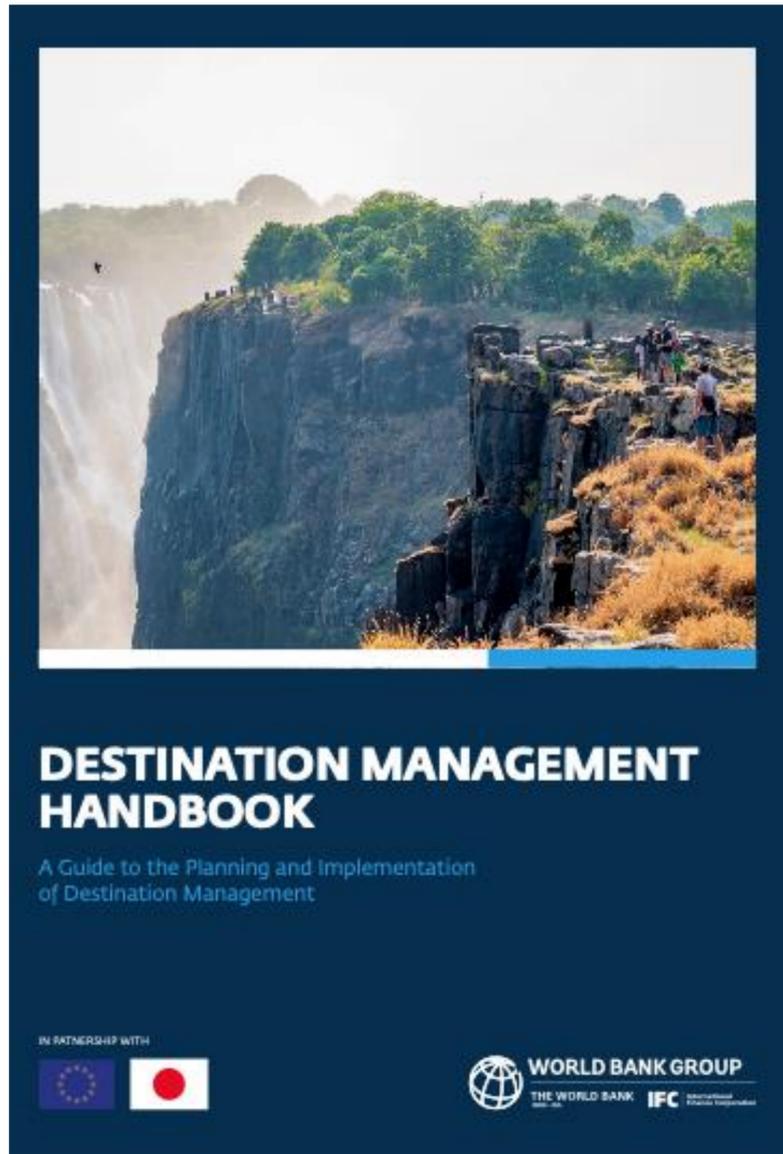
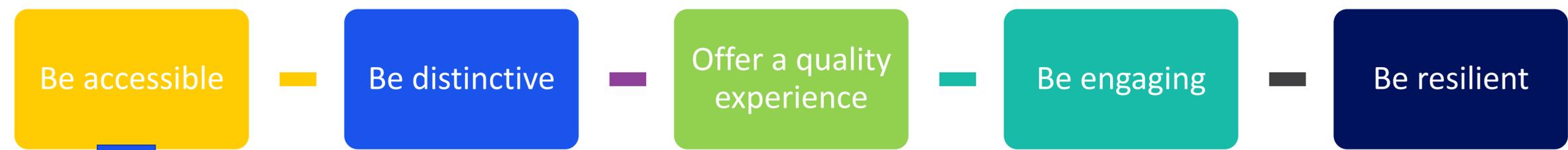
[EU-Africa Global Gateway Investment Package](#) (€150 billion) supports accelerating the green and digital transition, sustainable growth and decent job creation, strengthening health systems and improving education and training.

[EU-Latin America and the Caribbean Global Gateway Investment Agenda](#) (TEI €45 billion) revolves around pillars of fair green transition, inclusive digital transformation, human development and health resilience and vaccines.

[EU-Asia and the Pacific packages](#) focusing on sustainable infrastructure projects and digital innovation.



Example: What actions can be taken to support regenerative NBT?



		Action Options
1. Be accessible	Quick wins	<ul style="list-style-type: none"> Improve destination visibility through digital content and open data for tour operators and platforms Launch information campaigns on how to reach the destination and what to expect (transport, accommodation, booking systems) Simplify and digitize licensing and permitting requirements for small tourism operators
	Intermediate measures	<ul style="list-style-type: none"> Streamline visa and border-crossing processes (e.g., regional visas like the KAZA UNIVISA) Introduce “one-stop-shop” tourism business portals for licensing, registration, and investment (e.g., under Tourism Authorities) Offer micro-grants or revolving funds to support basic guest services (accommodation, food)
	Strategic investments	<ul style="list-style-type: none"> Invest in basic access infrastructure (roads, airstrips, water crossings) Establish traversing/access agreements in cross-border areas (e.g., Transfrontier Conservation Area [TFCA] corridors) Build enabling investment environments by aligning national tourism strategies with Micro Small Medium Enterprises (MSME) needs (e.g., omnibus licenses, tiered regulatory models, etc.)

ii Expert recommendations on **HOW** to work on nature-based tourism

No.	Section title
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3.4	Actions and assessment of options for the use of financial instruments for regenerative NBT value chains
4	What steps can we take to design and implement successful NBT actions?
5	Examples of NBT specific objectives, expected results, performance indicators, M&E
6	Glossary
7	Annexes

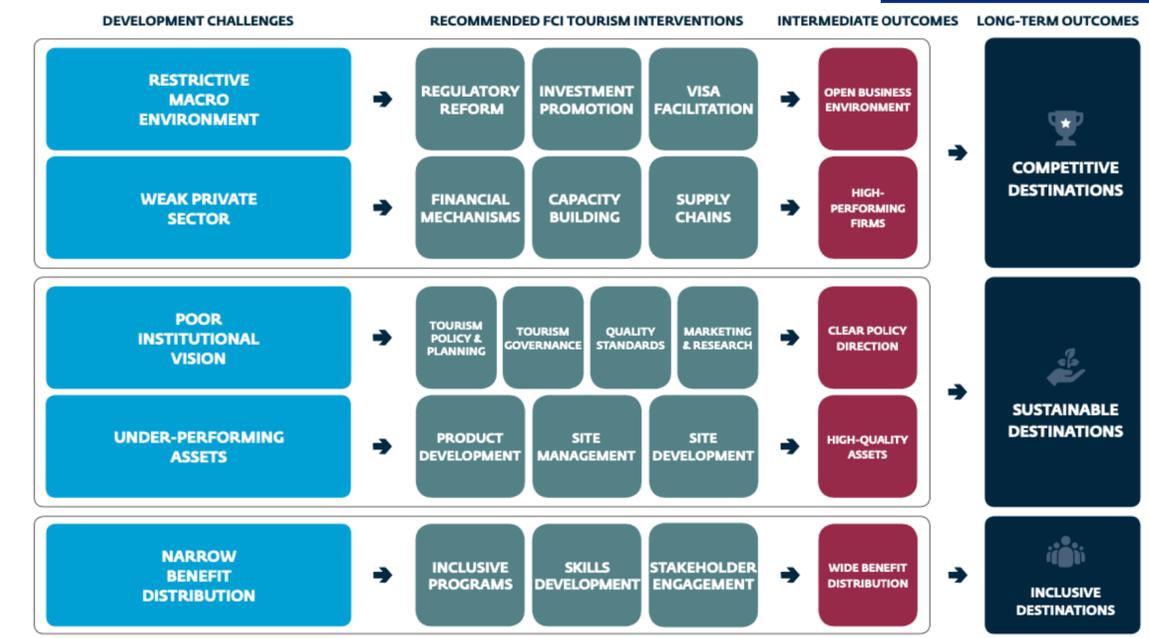
Concrete actions and examples

Box 2: Development and conservation financing benefits of NBT²³

Poverty reduction: Tourism was responsible for decreased poverty rates in **Costa Rica** (-10%) and **Thailand** (-30%) in villages within or close to protected areas. In both countries these protected areas systems have also reduced deforestation and protected threatened species. In **China**, nature-based tourism in protected areas was credited with raising 4,654 villages above the poverty line over a 20-year period.

Job creation: In 2009 there were 333 million annual visits to protected areas in **China** (mostly domestic visits), generating almost US\$3 billion in spending and creating 1 million jobs. In **Tanzania**, tourism accounted for nearly 10% of the GDP in 2015 (equivalent to US\$4 billion) and provided well-paid jobs to over 400,000 people.

Protected area revenues: In 2005, entrance fees for Corbett National Park in **India** were doubled from US\$ 2 to US\$ 4 per night. Park revenues increased from US\$ 20,000 to US\$ 75,000, and 50 additional local youths were hired. The improved facilities and infrastructure that followed is then credited with leading to a threefold increase in tourism from 2005 to 2009 providing US\$ 1.5 million in park revenues.



Box 7: Routes and circuits – combining nature with cultural attractions to promote destination exploration

The Gambia:⁵¹ Supported by the EU and established by the Gambia Tourism Board, the **Ninki Nanka Trail** links youth-led community-based tours and attractions. These include birdwatching, wildlife viewing (including hippos and baboons), African history and dance, kayaking and biking tours, all linked along the **River Gambia**. The trail was established after a comprehensive amount of market research and product piloting for years. An objective of the initiative is to support youth empowerment, and build resilience in rural populations that are vulnerable to migration in the country.



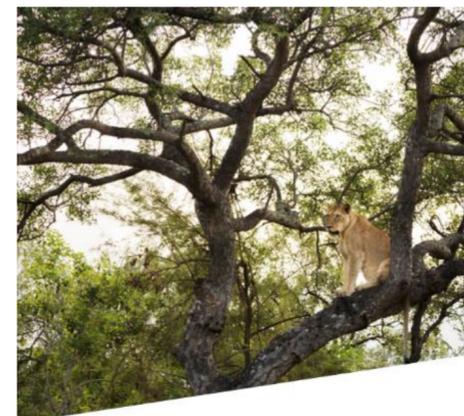
Box 28: Further resources relating to developing regenerative NBT value chains in destinations, and for enterprises

- [Tools and Resources for Nature-Based Tourism \(2022\) – World Bank](#)
- [Handbook for sustainable tourism practitioners: The essential toolbox \(2021\) – Edward Elgar](#)
- [Tourism and visitor management in protected areas \(2018\) – IUCN](#)
- [International Cultural Tourism charter : Managing tourism at places of heritage significance \(1999\) - International Council on Monuments and Sites \(ICOMOS\)](#)
- [Guidelines for an inclusive wildlife tourism economy in the Greater Kruger Protected Area \(2019\) – Kruger to Canyons Biosphere Region](#)
- [Toolbox of Nature Positive tourism resources \(2022\) – WTTC](#)
- [Nature Positive Travel & Tourism in Action \(2024\) - WTTC](#)
- [The Invisible Burden of tourism: Destinations at risk \(2019\) – The Travel Foundation, Cornell University; EplerWood International](#)
- [Destination management handbook: A guide to the planning and implementation of destination management \(2022\) – World Bank Group](#)
- [Sustainability - Your guide to more sustainable hospitality - Discover a more sustainable approach to tourism and hospitality \(1996-2025\) – Booking.com](#)
- [GSTC Standard for Tour operators – Standard for hotels - Standard for Destinations – Standard for attractions – Global Sustainable Tourism Council \(GSTC\)](#)
- [The role of certification in building a more sustainable travel industry \(2025\) – DG European Commission’s Environment Policy - Booking.com](#)

Protecting natural (& cultural) assets

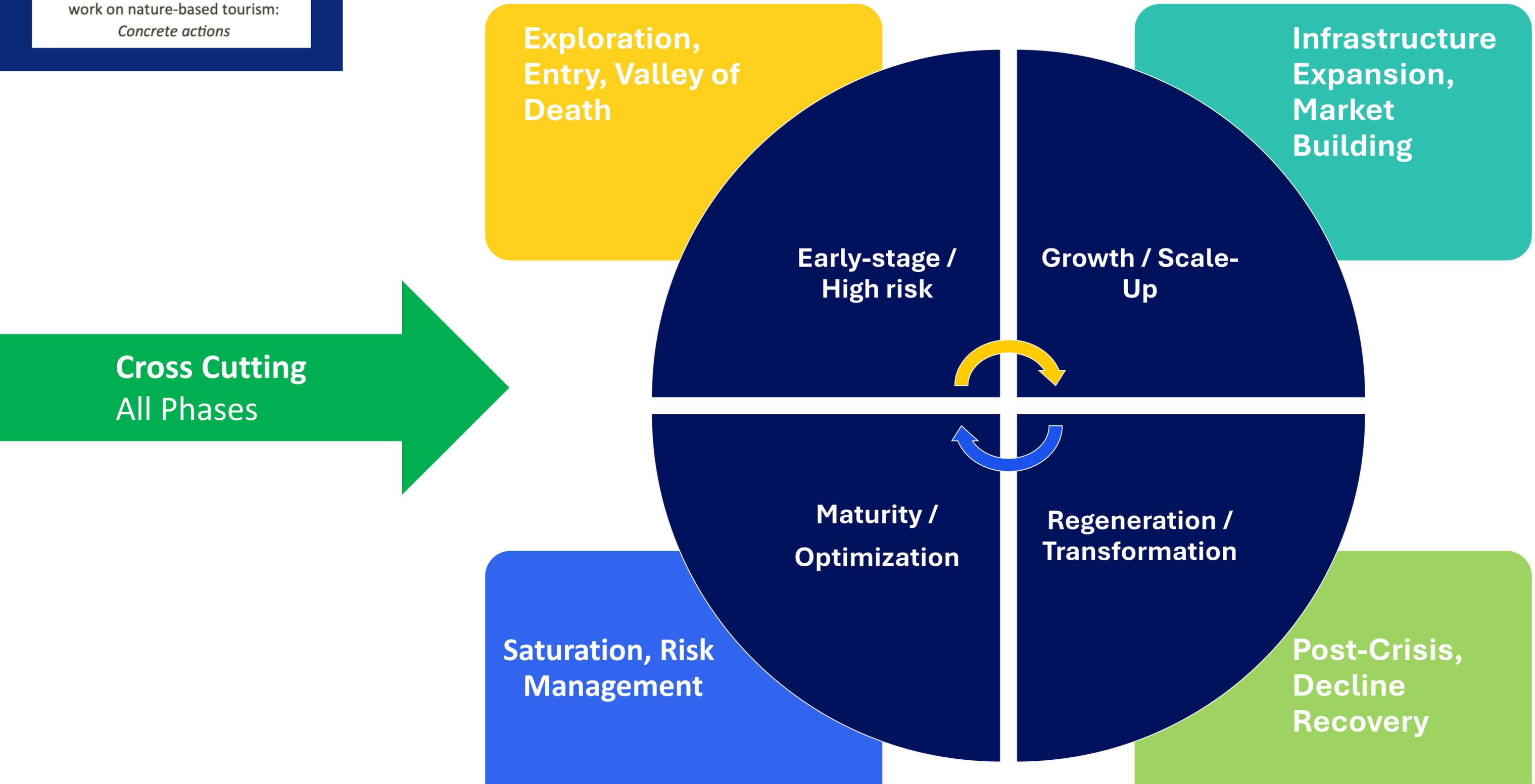
What actions can be taken to protect natural and cultural tourism assets in destinations? *Extracts from the GSTC Destination Standard*

Area of action	Destination Standard <u>Criteria</u>
<p>Supporting biodiversity conservation</p> <ul style="list-style-type: none"> ● Monitoring flora and fauna ● Wildlife management ● Habitat management ● Pollution prevention 	<p>D1 Protection of sensitive environments D2 Visitor management at natural sites A8 Managing visitor volumes and activities</p>
<p>Sustainable use of biodiversity</p> <ul style="list-style-type: none"> ● Bioprospecting ● Hunting ● Fishing 	<p>D3: Wildlife interactions D4 Species exploitation and animal welfare</p>
<p>Showcasing local culture</p> <ul style="list-style-type: none"> ● Linkages with local cultural tourism products ● Showcasing sites of cultural heritage significance ● Offering performance to showcase local cultural heritage 	<p>C1 Protection of cultural assets C2 Cultural artefacts C3 Intangible heritage</p>



GUIDELINES FOR AN INCLUSIVE WILDLIFE TOURISM ECONOMY IN THE GREATER KRUGER PROTECTED AREA

NBT investment cycle



Private sector linkages & tourism PPPs

PPP Type	Public Sector Role	Private Sector Role	Key Advantages
Build-Operate-Transfer (BOT)	Provides land, permits, and oversight	Finances, builds, operates, maintains and transfers infrastructure	Public sector gains ownership of assets after the private sector's operational period.
Build-Own-Operate (BOO)	Sets regulations and ensures compliance	Invests in, owns, and operates the venture	Full private sector control and risk, enabling efficient development
Design-Build-Finance-Operate (DBFO)	Establishes legal framework and policies	Manages design, finance, build, and operation of the project	Promotes innovation and efficiency with private sector managing all aspects
Concession Agreement	Awards long-term user-rights to <u>build and manage</u> tourism facility.	Responsibility for all investment and usually accountable for management of the facility. Operates tourism activities (may be sub-leased)	Combines conservation with revenue generation for both public and private sector. Agreement may include conditions reducing environmental impact (waste, water use etc). and benefiting local communities. Duration 10-40 years
Lease Agreement	Owns assets and ensures terms are followed. Provides maintenance services.	Operates the leased assets. Pays public sector fee to operate facility	Local communities may benefit from employment and sales of goods and services to operator, while public sector ensures sustainability. Duration typically more than 5 years
Management contract	Owns and is responsible for assets and ensures terms are followed. Pays operator a fixed management fee and/or performance-based fee	Manage and operate existing facility	Low risk for both private and public sector partners. Duration typically less than 5 years

Concession agreement: Singita Lebombo, in the Kruger National Park, South Africa- Build Operate Transfer



IMPACT: To make NBT activities greener, nature-positive and competitive, while reducing inequalities and externalities

Nr. jobs supported/sustained by the EU in NBT VC MSMEs

Nr. Key Landscape Areas (KLA) with improved conservation

SO1: To improve the long-term environmental and business performance of nature-positive MSMEs in the tourism sector

% NBT VCs MSMEs report improved capacities

% NBT VCs MSMEs third-party with certification as sustainable

Nr. financial instruments with eligibility for MSMEs within NBT VCs

Value of financial support secured by NBT VCs MSMEs (EUR)

SO2: To strengthen the enabling business environment for nature-positive MSMEs in the tourism sector (reduced inequalities and enhanced integration into global VCs)

Nr. nature-positive MSMEs in ground handler supply chains and itineraries

Nr. nature positive MSMEs in European Tour operator SCs and itineraries



Alliances for Science, Technology, Innovation and Digital



Partnerships for Migration and Mobility



Alliance for Sustainable Growth and Jobs



Green Alliances and Partnerships



Partnerships for Human Development, Peace and Prosperity



Gender Equality

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3. NBT Financing

Key Challenges for the private sector

**High Initial
Investment &
Uncertain
Returns**

**Risk Perception
& Awareness
Gaps**

**Complex
Stakeholder
Alignment**

**Regulatory
Barriers**

**Capacity
Constraints**

**Limited Track
Record**



Key Challenges / Barriers Facing Women Entrepreneurs in Accessing Finance

Despite lower default rates, women remain
“the most underestimated force for transformational change.” (EIB, 2023)

Limited
Collateral &
Credit Histories

Gender Bias in
Lending

Low(er)
Financial
Literacy

Under-
representation
in Financial
Sector

Lack of Gender-
Responsive
Products

Case Study

Eco.business Fund

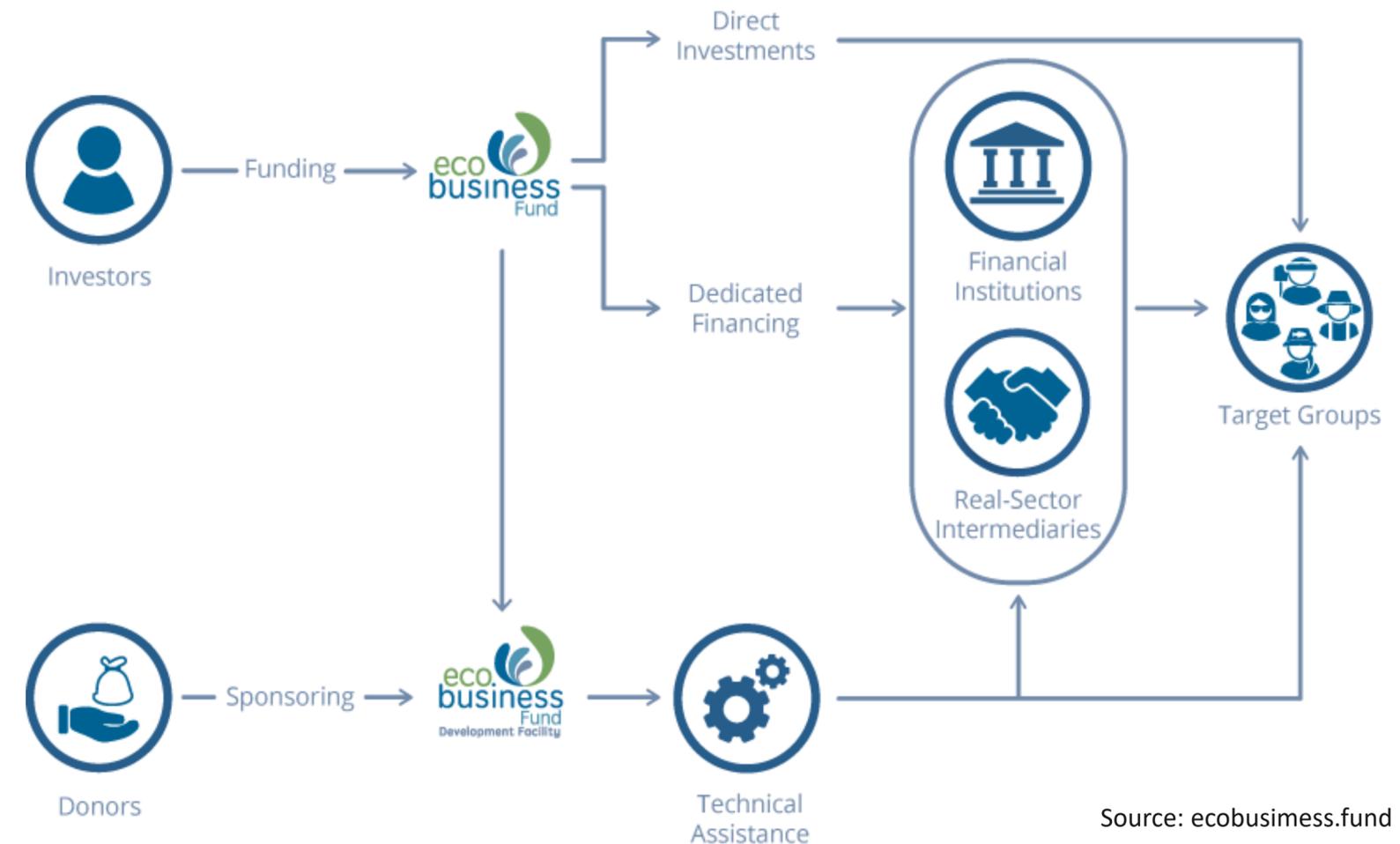
KfW, Conservation International, Finance in Motion

Sectors: Agriculture, fisheries, forestry, tourism (emerging)

Objectives: Biodiversity conservation, climate change mitigation & adaptation

Financing Model: Public capital as risk buffer to attract private investment; financing via FIs & intermediaries

Sustainability Bonds: to expand green investment potential



Source: ecobusiness.fund

Tourism Portfolio: 3% of total in 2023; seen as a model for future NBT investments.

South Africa Wildlife Conservation Bond for Rhinos (USD150M) World Bank Group

Objectives

Increase black rhino populations, support local economies, and strengthen ecosystem health

Type

Blended finance conservation bond



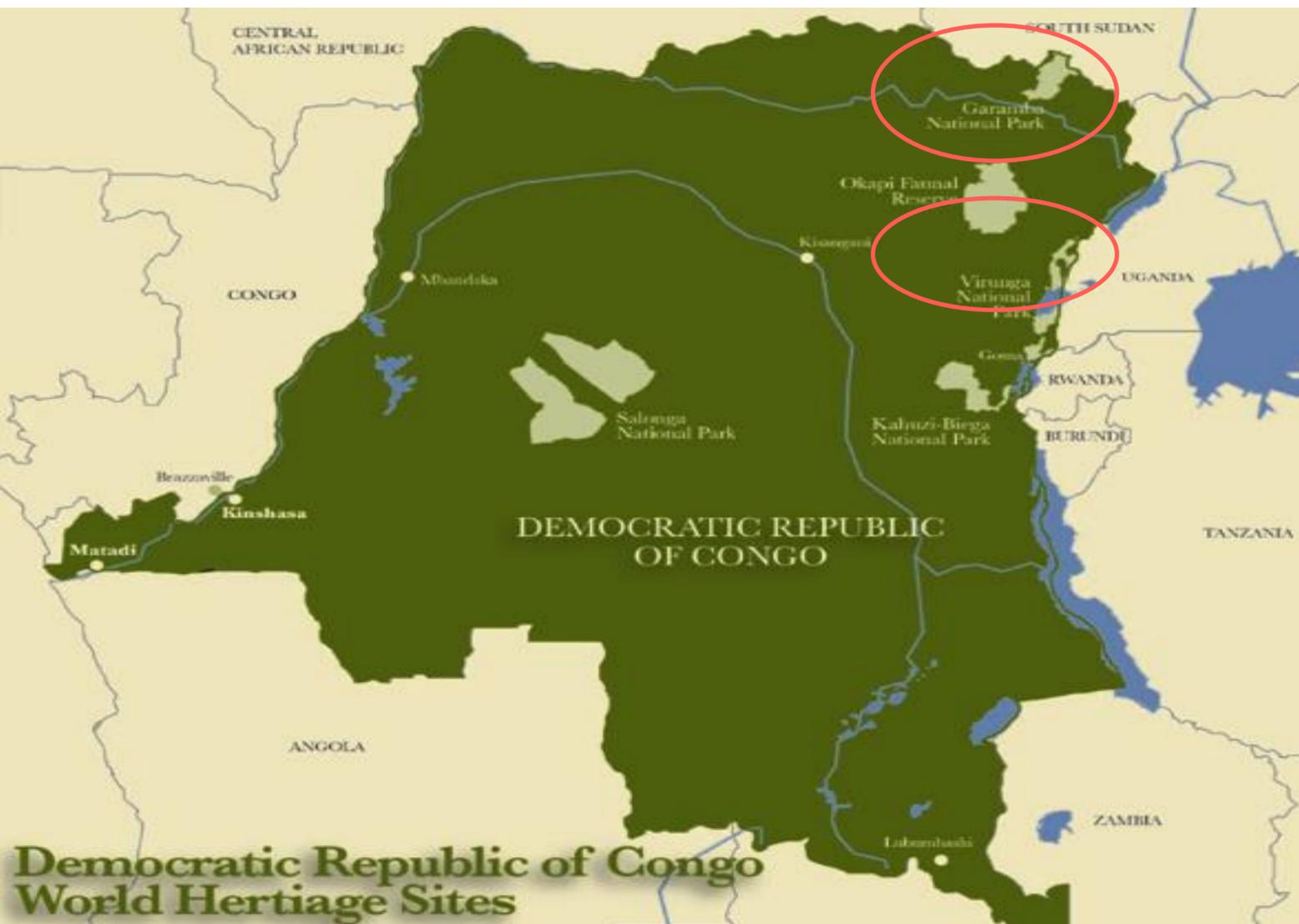
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4. Garamba Business Case

NBT Development in Garamba National Park, DRC & Building the Virunga–Garamba Green Corridor African Parks Network, ICCN, local communities, EU



Why? Growing NBT Momentum in Africa

- 678+ NBT SMEs actively seeking finance
- \$800M+ in active NBT projects (2017) + \$115M pipeline

Source: IFC/Dalberg and WB

Linkage to EU Strategy

- Aligned with **EU Gateway Investment Plan for DRC**
- Supports **conservation, sustainable livelihoods, and regional stability**
- Advances sustainable finance in underfunded biodiversity zone

Entry Barriers & Solution Options

- Political insecurity, lack of investor insurance, short concession horizon

Need for **early-stage capital, enabling infrastructure**

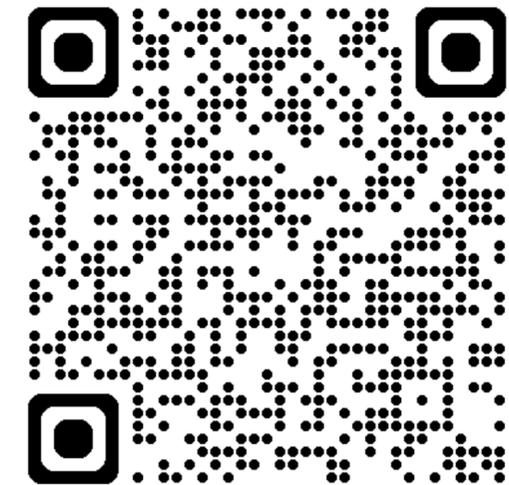
EU Tourism Platform

Photo by David Marcu

Single platform for the EU Tourism Transition Pathway

Discover actionable insights and strategies on the Transition Pathway Stakeholder Support Platform for EU Tourism ecosystem to drive sustainable growth and innovation in your tourism business.

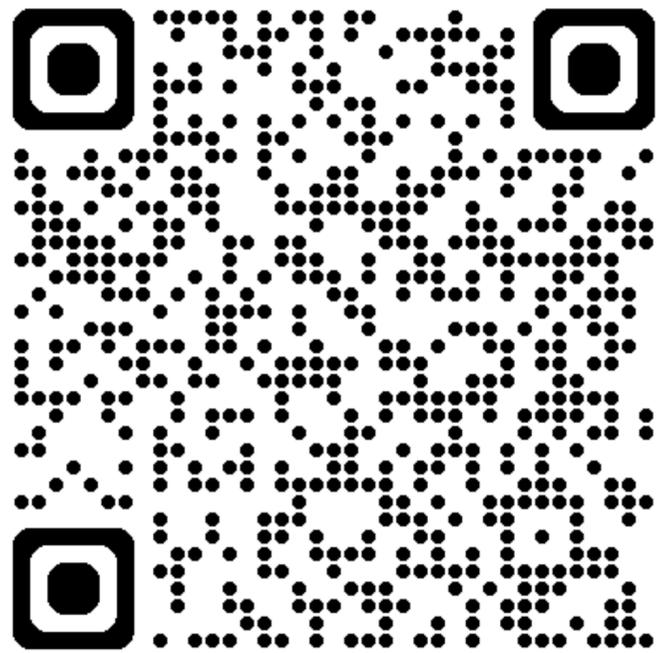
Join the pathway >



- Access updated information through resources (articles, studies, guidelines, reports....)
- Discover stakeholder pledges & best practices
- Explore events, courses, support and funding opportunities
- Connect with members from around the world using the interactive map

EU Strategy for Sustainable Tourism

Targeted Consultation:
15 August 2025



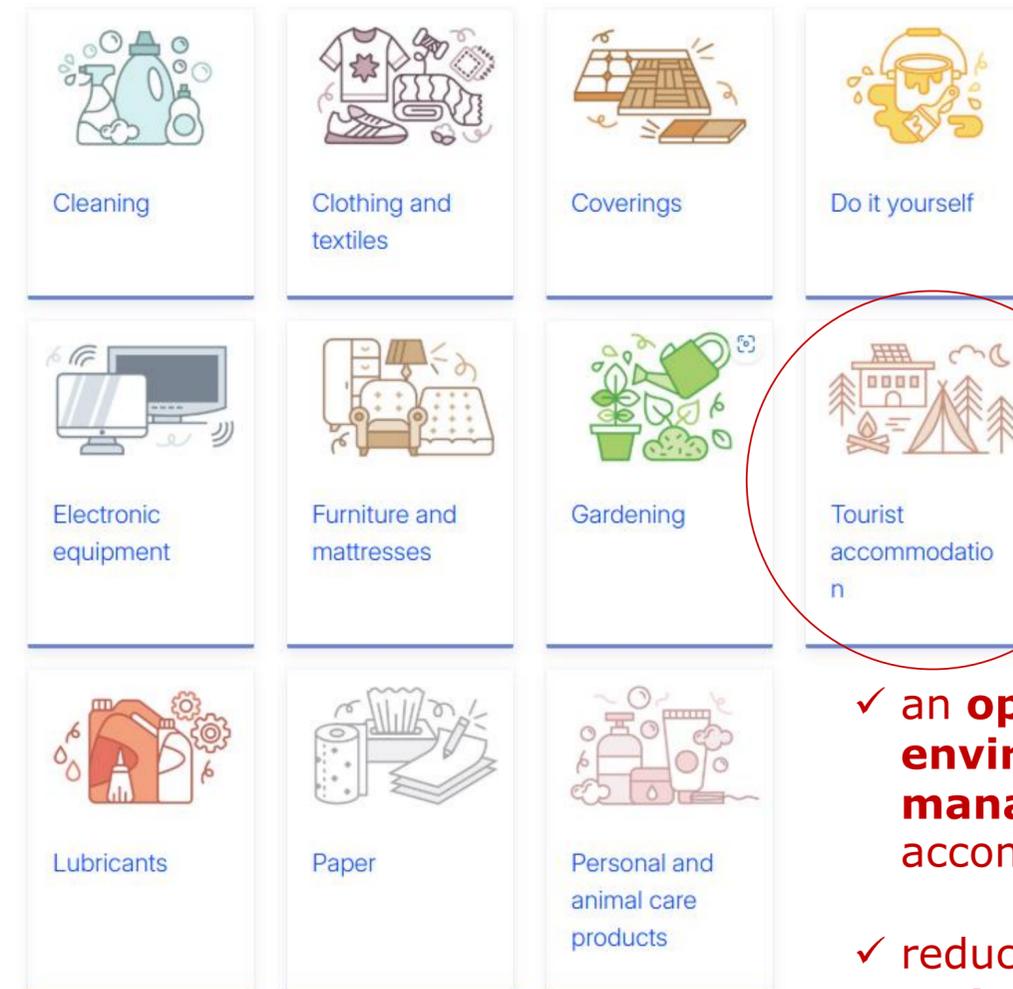
<https://ec.europa.eu/eusurvey/runner/TourismStrategy>

The EU Ecolabel



- **Official EU voluntary label for environmental excellence since 1992**
- Can be awarded to **high-quality and best in class products** (good and services) - in terms of **environmental performance - placed on the EU market**
- **Reliable and trustworthy ecolabel:** multi-criteria; life-cycle and scientific approach; open-transparent-multi-stakeholder criteria setting; **third party verified** (ISO 14024 Type 1)
- Awarded to 25 Product Groups, including **Tourist Accommodation Services**
- Managed by EC and Member States
- [Find more about the EU Ecolabel](#)

Discover the full range of EU Ecolabel product groups



- ✓ **an optimised environmental management** of the accommodation
- ✓ reduced: **energy and water consumption, CO2 emissions, use of chemicals & pesticides, waste** generation including food waste, **emissions** from transport

EU Ecolabel for Tourist Accommodation

- Possibility to apply for hotels, hostels, resorts, serviced apartments, campistes, bed&breakfasts, cottages, **located worldwide and marketing their services on the EEA market** (EU + Lichtenstein, Norway and Iceland).
- Find more about the [EU Ecolabel for Tourist Accommodation \(TA\)](#): Check out the [criteria](#) & the EU Ecolabel Tourist Accommodation [Catalogue](#)
- As a prerequisite, the Accommodation should comply with all the legislation in the country where it is located, including legal employment of staff.
- [Application and annual fees](#) depending on company size and country (discounts for micros, SMEs and developing countries)

Conscious travelers are today increasingly looking for accommodations that make efforts to reduce the environmental impact

Tourist accommodations are willing to take an active role in the green transition, becoming more competitive and resilient



➤ **EU Ecolabel for TA is a safe investment:**

- ✓ complies with new and forthcoming legislation on sustainability labels
- ✓ attracts travellers who recognise the EU Ecolabel logo
- ✓ financial savings related to reduced energy, water and waste

About Us

 SAFARIBOOKINGS

 SafariOffice.



Delivering the world's largest online marketplace for African safaris and the world's leading software for safari companies

- 6.000+ tour operators, agents, and DMC use our tools
- 5.500+ properties (lodges, camps, hotels) are connected
- 280.000+ traveler requests (35% EU travelers) (2024)
- 500.000+ booked nights (2024)
- 130.000+ verified reviews by travelers



What:

- **Bridge the gap** between locally run tourism businesses and international travelers, helping them access global demand directly.
- **Build digital capacity** to make small and medium tourism enterprises more efficient, competitive and create sustainable businesses.
- **Empower businesses (and industry partners)** with practical tools, real-time data, and training to improve operations and decision-making.



Example.

Then:

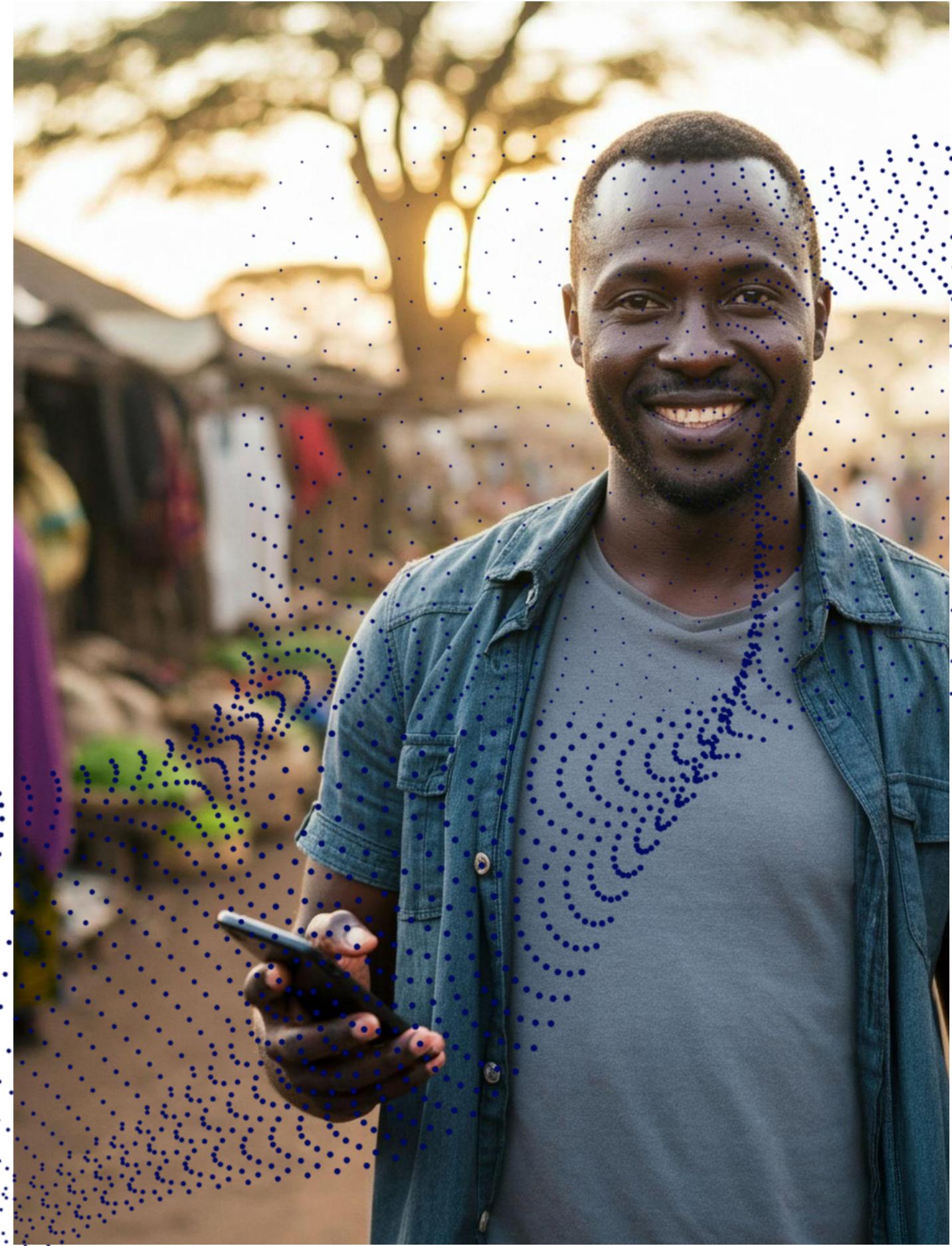
5 years ago, this tour operator relied on B2B agents for 90% of their bookings.

Now:

With digital tools and training, they attract and manage their own direct clients.

→ 78% of business is now B2C

→ Margins increased by 25.6%



Two more Examples.

Then:

Started as a one-person tour company just 10 years ago.

Now:

Runs a successful €8M/year operation.
→ Built initial visibility through SafariBookings
→ Scaled operations with SafariOffice
→ Now employs 120+ local staff and has opened 2 lodges

“

We scaled from 5 to 15 salespeople, and 10 folded our revenue.

Scaling a business in the safari industry is no small task, especially in such a competitive field. For us, compiling data and making data-driven decisions has always been a top priority. “While...

[Read Full Testimonial →](#)



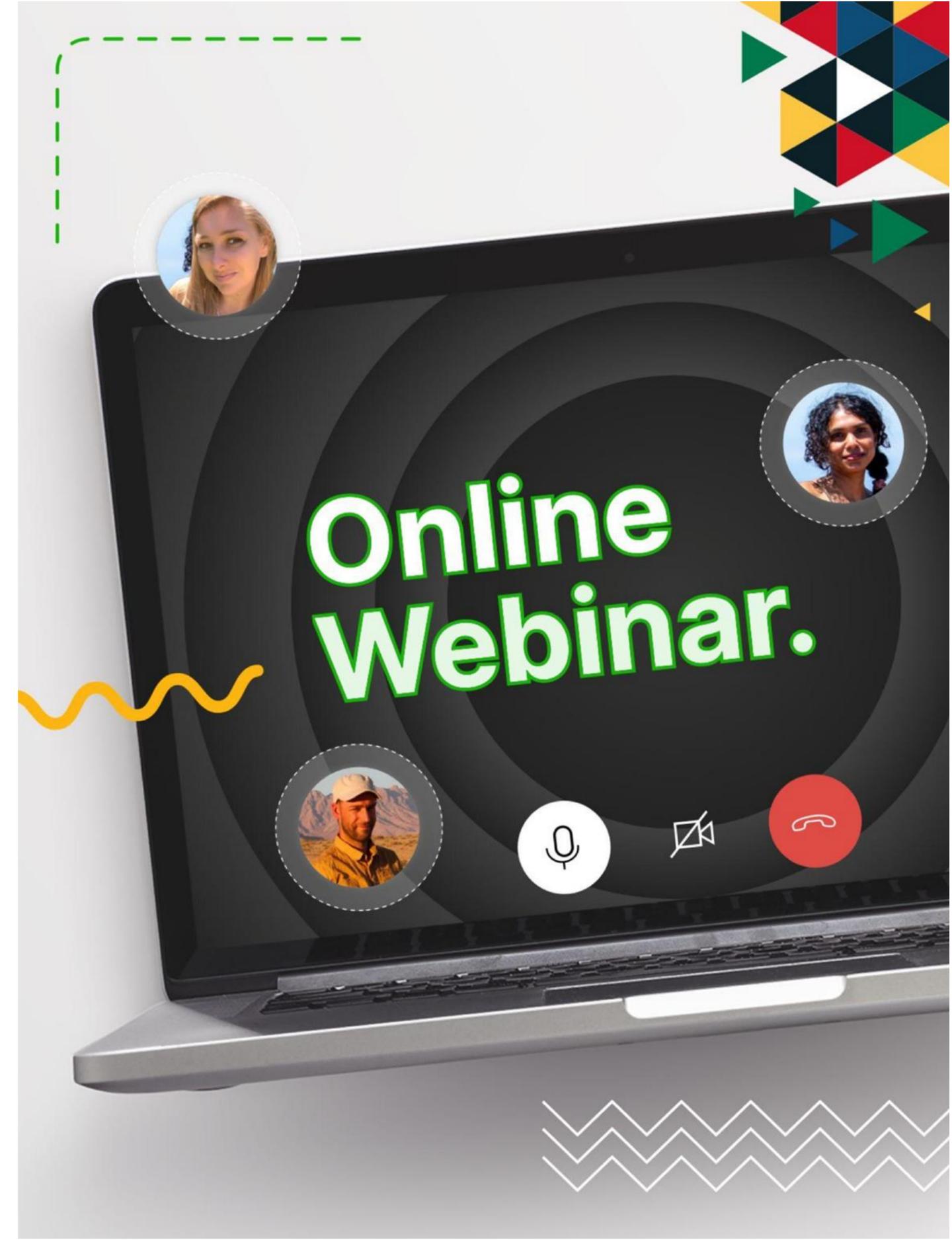
Safari Soles Tours

Bryson Robert, Owner

 Tanzania

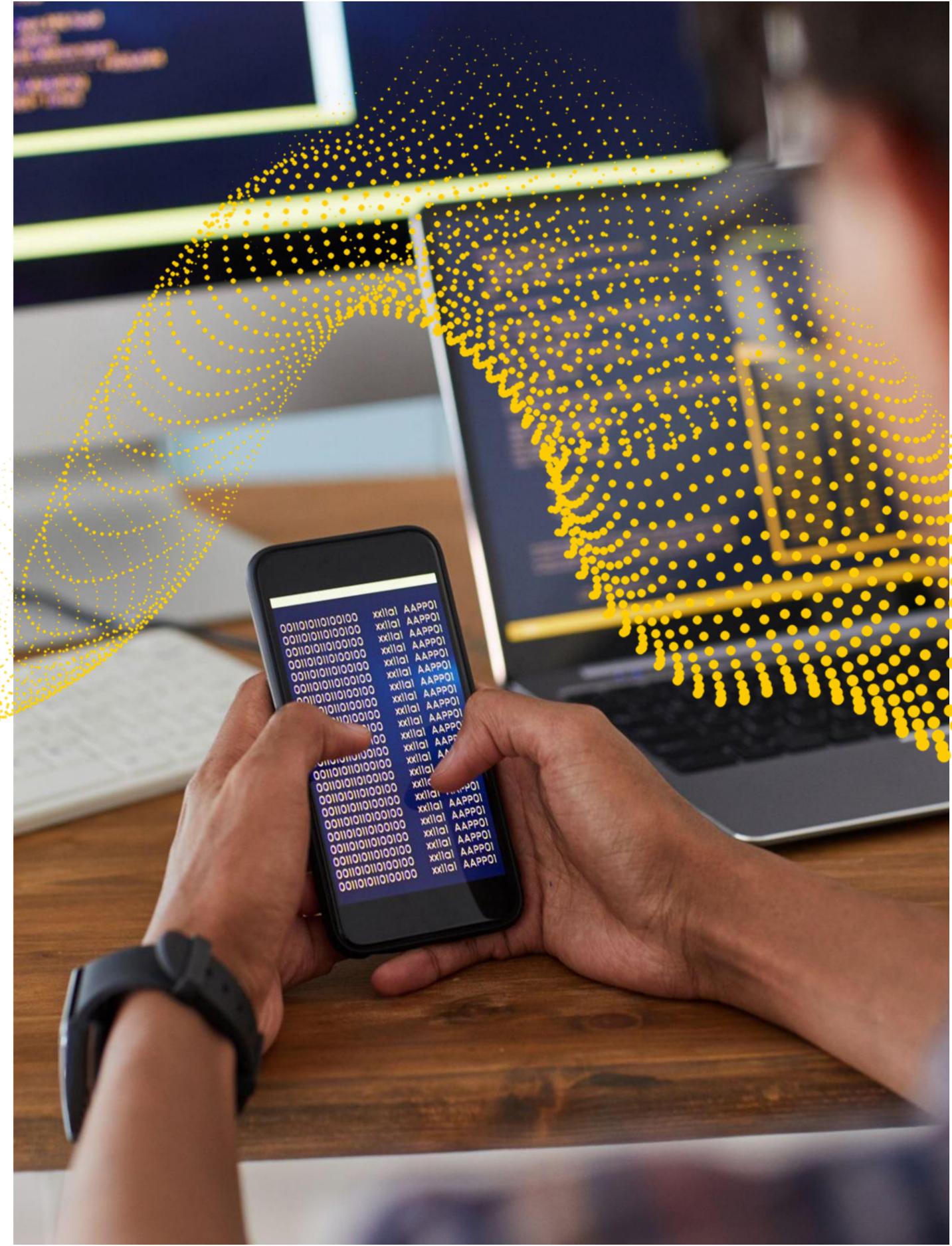
Knowledge.

Sharing knowledge and developing businesses with tools, content, data, and training.



Data Insight.

Using our data to learn and improve business potential, help industry partners and help (local) government.



Example.

**Mweka College of African
Wildlife Management**
*over 400 students trained in 2
years time using SafariOffice*

‘Running a tour business’

