Transformation, Transformation, Transformation
Acknowledging:

1. When the two of us are sitting on top.
2. When the white man is removed on top.
3. There is not enough space at the top.
4. Don't have enough strength to pull us up.
5. It's very difficult up there; you need experience.

How South Africa was built

("Equal opportunity")
Transformation

• How much, to what extent and when do to see change
• What would like to change
• What are the biggest barriers
• How would you like to resolve them and who should resolve them

• CHANGE
Through the Wildlife Economy Lab, our vision is to better establish an economy that contributes to the well-being of all South Africans

**Aspiration**

An inclusive, sustainable and responsive wildlife economy that grows at 10% p.a until at least 2030, while providing a foundation for social well-being and maintaining the ecological resource base.

**Objectives**

1. Economic growth
   - Average yearly sector GDP increase of ~10%
   - Create 100,000 new jobs

2. Transformation
   - 30% of wildlife businesses PDI owned
   - PDI ownership of >5 million Ha, and access to another >5 million Ha
   - 4,000 PDI owned SMMEs supported to engage in the wildlife economy

3. Sustainability
   - 5 million ha of non-protected areas contributing towards conservation target (AICHI)
   - 3.5% animal population net growth p.a.

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1 Trained or directly linked to the wildlife supply chain
The Wildlife Economy faces several challenges preventing growth and transformation happen at full potential

<table>
<thead>
<tr>
<th>Barriers to transformation</th>
<th>Risk of future growth stagnation</th>
<th>Unsupportive enabling environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ Insufficient access, ownership and inefficient utilization of land</td>
<td>▪ Insufficient government endorsement for hunting as a tourism activity</td>
<td>▪ Insufficient interdepartmental coordination and understanding of the benefits of the bio-economy</td>
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<td>▪ Lack of infrastructure development support for entrepreneurs</td>
<td>▪ Untapped black consumer potential</td>
<td>▪ Insufficient knowledgebase (research and access)</td>
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<td>▪ Lack of access to ‘startup’ game</td>
<td>▪ Insufficient societal value given to wildlife resources and understanding of the sustainable use concept</td>
<td>▪ Gaps in industry standards (and compliance)</td>
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<td>▪ Lack of organized governance amongst community and emerging entrepreneurs</td>
<td>▪ Insufficient awareness and capitalisation of the value of mixed wildlife/livestock interfaces</td>
<td>▪ Excessive and inefficient permitting</td>
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<td>▪ Lack of technical skills, oversight, business support and effective business and partnership models</td>
<td>▪ Insufficient mechanism addressing and containing risks and threats to the ecological resource base in further growing the biodiversity economy</td>
<td>▪ Unsupportive legislative regime</td>
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<tr>
<td>▪ Lack of access to finance and incentives for transformation</td>
<td>▪ Misalignment of SPLUMA and PDALFB (Land use)</td>
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<td></td>
<td>▪ NEMBA lacking in enabling provisions</td>
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<td></td>
<td>▪ Misalignment of provincial and/or national hunting legislation</td>
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<td></td>
<td>▪ Lack of sufficient collaboration platform for the industry</td>
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<td></td>
<td>▪ Lack of capacity (human and financial) to effectively manage and harness the potential of wildlife resources</td>
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<td></td>
<td>▪ Lack of a formal game meat industry</td>
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