Kenya Wildlife Conservancies Association
Living nature, Living people

Unlocking the Potential of Conservancies

Guiding and Prioritising Investments into Kenya's Conservancies

2024

Acknowledgements

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This report has been compiled by Sustain East Africa
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Acronyms

AWF	African Wildlife Foundation
CBO	Community Based Organization
CBNRM	Namibian Association of Community Based Natural Resource Management
GIS	Geographic Information Systems
GMMC	Greater Mara Management Company
HWC	Human Wildlife Conflict
IFAW	International Fund for Animal Welfare
KMGBF	Kunming-Montreal Global Biodiversity Framework
KWCA	Kenya Wildlife Conservancies Association
KWS	Kenya Wildlife Service
LA	Landscape Associations
LCA	Laikipia Conservancies Association
MMWCA	Maasai Mara Wildlife Conservancies Association
NGO	Non-Governmental Organization
NRT	Northern Rangelands Trust
OECM	Other Effective Area-based Conservation Measures
OPC	Ol Pejeta Conservancy
PA	Protected Area
PES	Payment for Ecosystem Services
PFP	Project Finance for Permanence
PIC	Plan Implementation Committee
PMCC	Pate Marine Community Conservancy
REDI	Representative, Effective, Durable and Inclusive
RLCA	Rift Lakes Conservancies Association
TA	Technical Assistance
TNC	The Nature Conservancy
TTWCA	Taita Taveta Wildlife Conservancies Association
USAID	United States Agency for International Development
WDPA	World Database Protected Areas

Key Definitions

To ensure a common understanding of terms and definitions, there are several words and phrases that are used throughout this report which we would like to define here.

Term	Definition
Effectively and equitably managed	Management which achieves sustained positive outcomes for biodiversity conservation through the adoption of appropriate management objectives and processes, ensuring all relevant actors are involved and able to fully participate in establishment, management, and governance of a PA.
Other effective area-based conservation measures (OECM)	An area which is not within a protected area but delivers long-term biodiversity conservation under equitable governance and management. OECMs can be governed by a variety of rights holders and actors including indigenous peoples and local communities, government agencies, as well as sectoral actors, private organizations, and individuals.
Protected Area (PA)	A protected area constitutes 'a clearly defined geographical space, recognized, dedicated and managed through legal or other effective means, to achieve long term conservation of nature with associated ecosystem services and cultural values'.
REDI	Representative, Effective, Durable and Inclusive
Well-connected	A well-connected conservation network is one where ecological processes and functions connect between different sites.
Wildlife Conservancy	An area of land set aside by an individual land-owner, body corporate, group of owners, or a community for purposes of wildlife conservation.

Table 1. Key definitions referred to in the report.

Executive Summary

This report communicates our current understanding of the status and potential of conservancies in Kenya, as to inform evidence-based needs and strategies pertaining to achieve Target 3 of 30X30. A situational analysis of key actors in Kenya's conservancy landscape is presented, to provide context to the role conservancies might play in achieving this goal.

In addition, the specific conditions required to accelerate conservancy growth in Kenya is discussed with reference to key enablers and the role they can play. An iterative process has been used to identify areas and activities to include in the final conservation and community plan, ensuring that investments contribute to conserving a conservancy network that is REDI.

Key Considerations for Sustainable Financing

Kenya aims to achieve Target 3 of the Kunming-Montreal Protocol (30x30), which involves improving conservancy management to at least an operational level, where they have good governance, are beginning to develop funding mechanisms, and have some resources to manage the conservancy and distribute benefits. Currently, only 1% of conservancies are well-managed and durably financed, with 7.9% at the operational stage. Over 90 new conservancies are proposed, potentially covering an additional 13.8 million hectares. If all existing and proposed conservancies reach an operational stage, they could cover 23.9% of Kenya's terrestrial land.

Baseline Outcomes

Kenya has seen a significant increase in the number of active conservancies, growing from 160 to 245, with these conservancies now covering 10.6 million hectares or 18.3% of the country. These conservancies are categorized as mature, operational, or emerging.

Conservancies in Kenya are classified into three types based on land tenure, legal entity, and management: private, group, and community. However, management capacity varies greatly, with less than 40 conservancies registered with the Kenya Wildlife Service (KWS) and even fewer having gazetted management plans, limiting their legal and management capabilities.

Conservancies rely on four main revenue streams: tourism, carbon, livestock, and donor support.

Tourism is the primary revenue generator, bringing in USD 26,693,257 annually, followed by carbon earnings (USD 4,631,676), livestock earnings (USD 2,597,189), and donor support (USD 6,966,677). However, there are significant disparities in revenue generation across different conservancies.

Based on Kenya's population distribution, conservancies likely have an impact on at least 1.3 million people who live in or near them, with an additional 1.2 million people near proposed or non-operational conservancies. Therefore, it is critical that conservancies are governed in an inclusive manner, and effectively managed to deliver ecological and social benefits.

Situational Analysis: understanding actors and enablers

Key Actors	Key Enablers
Conservancies Baseline Outcomes Deep-Dives Spatial Database Managers Forum	**Spatial Planning** Group Discussions Key Informants
Private Sector Baseline Outcomes Conservancy Finance Review Managers Forum Tourism Database	**Spatial Planning** County Plans Ecosystem Management Plans
Landscape Associations Managers Forum Organisational Assessment	**Human-Wildlife Conflict** Managers Forum Key Informants
Households Baseline Outcomes Deep-Dives	

Figure 1. Situational Analysis Outline

Key Actors

In this review, the current status of Kenya's conservancies is evaluated in relation to key stakeholders and their potential impacts. Conservancies are categorized into various growth stages, helping identify the necessary funding and technical support. The review addresses barriers and financing options to increase private sector engagement with conservancies. It also examines support from landscape associations. The review reveals that technical assistance is inadequate and financial resource allocation is inequitable.

At the household level, conservancies have the potential to provide diverse benefits, both direct (monetary) and indirect. Consequently, conservancies can significantly enhance the economic, social, environmental, and cultural well-being of local communities, while promoting sustainable development and conservation efforts.

Key Enablers

Despite conservancies' heavy reliance on landscape associations, the support provided is highly variable, with inadequate funding and technical assistance. This shortfall stems from a lack of transparent, needs-based assessments to guide resource allocation.

Effective spatial planning, which aligns ecosystem management with county spatial plans, is crucial for harmonizing regional conservation and local development goals. In theory, holistic land-use planning helps mitigate human-wildlife conflict by preventing uncontrolled land-use changes and encroachment. Many areas remain unadjudicated and unregistered, preventing communities from legally entering contractual agreements with private sector investors in tourism, carbon, and development. Efforts to enforce robust land tenure should focus on government resource allocation, conservancy support, and cost reduction.

Evidence-Based Recommendations

Securing a connected conservancy network requires sufficient support through technical assistance levers, a range of durable financing mechanisms, and a conducive policy environment. As such, we outline several strategies to address evidence-informed needs for sustained conservancy support according to growth stages.

For conservancies to become REDI (Representative, Effective, Durable and Inclusive):

A range of different financing mechanisms specific to conservancy status and actors are needed.

At the conservancy level, considerations include the capacity of the conservancy and local actors involved as well as the location/accessibility, infrastructure, and scope for revenue generation of the conservancy.

Furthermore, the attractiveness of conservancies to investors and potential for revenue diversification form important considerations and it remains important to take into account the complexity and scale of required investments.

Three main policy levers have been identified to produce a conducive environment in which conservancies flourish. These include 1) biodiversity fiscal incentives, 2) actions surrounding government prioritization, including the enablement of investments in conservation-compatible revenue streams, and 3) changes to existing policy and legislation.

Investing in Our Future

Considering the social and economic barriers hindering the expansion of Kenya's conservancy network, the development of viable strategies to address the required technical and financial assistance is crucial. Sustainable finance plays a fundamental role in this context by offering the essential support needed to unlock the potential of conservancies. This support is pivotal in helping Kenya achieve Target 3 (30x30) of the Kunming-Montreal Protocol, which aims to conserve 30% of terrestrial and marine areas by 2030.


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Introduction

At the 2022 COP15 summit in Montreal, the Kunming-Montreal Global Biodiversity Framework (KMGBF) was adopted. Comprising 23 action-oriented global targets for urgent action over the decade to 2030, its aim is to address the urgent need for biodiversity conservation and sustainable development.

One of the key targets in the framework is Target 3, also known as 30x30, which calls for the expansion and enhancement of protected and conserved measures.

Three main measures for management are described to achieve this aim:

- Protected areas
- Other Effective Area-based Conservation Measures (OECMs)
- Indigenous and traditional territories

Recognising the urgency of conservation efforts, Kenya committed to protecting 30% of its terrestrial ecosystems by 2030, aligning with the Kunming-Montreal Global Biodiversity Framework.

There are numerous different types of protected areas in Kenya divided broadly into three categories according to land ownership (Public, Community, Private).

Governance arrangements and management institutions of these areas vary considerably. They can, for instance, be managed by the Government, Private, Community institutions or co-management arrangements (e.g. partnerships between Government and Community such as Community Forest Associations).

In Kenya, community and private lands present the most viable opportunity to realize the 30x30 target, considering that there exists minimal public land to expand government-protected areas. Therefore, conservation must incorporate landscapes that include and work for indigenous people and local communities, their livelihoods, their rights, and their values. Conservancies meet this criteria and by providing significant further support to existing conservancies, as well as investing in the establishment of new conservancies, Kenya has the capability of meeting Target 3.

Achieving this would require significant financial support. Project Finance for Permanence (PFP) is that can help fund large-scale, long-term conservation and could play a fundamental role in unlocking the potential of conservancies in Kenya by providing the necessary financial support to achieve Target 3.

Defining the Conservation & Community Plan

This report outlines the development process of a Conservation and Community Plan and serves as a guide to prioritising investments into Kenya's conservancies in order to achieve 30x30 requirements.

Building on the findings from the KWCA State of Wildlife Conservancies in Kenya Report (2016)[1], this review presents an updated evidence base to understand progress, and guide future planning. The findings of the review highlight the achievements, as well as the challenges and costs incurred along with the technical assistance and funding required for a conservancy to achieve its anticipated growth trajectory.

This evidence base has enabled the evaluation and quantification of Kenya's "conservation financing gap" - the difference between the resources required for effective conservation and the funds currently available.

Furthermore, the Conservation and Community Plan proposes possible next steps and recommended support packages required to ensure continued conservancy development. Ultimately the plan aims to overcome the country's conservation challenges, and achieves global commitments to conservation goals, all while being driven by locally-led institutions and creating prospering local communities.

Situational Analysis	Evidence Informed Needs	PFP Support Packages
Key Actors	Conservancy Maturity	Technical Assistance Levers
Conservancies	Technical Assistance	Financing Mechanisms
Private Sector		
Landscape Associations	Finance	Policy Mechanisms
Households		
Key Enablers	Policy	

Figure 2. The development process of the Conservation and Community Plan.

1 State of Wildlife Conservancies in Kenya Report 2016

Section One: Context: Progressing Community-Led Conservation in Kenya

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1.1. The Kunming-Montreal Global Biodiversity Framework (KMGBF)

The Kunming-Montreal Global Biodiversity Framework (KMGBF) was adopted in 2022 during the COP15 summit in Montreal. Its aim is to address the urgent need for biodiversity conservation and sustainable development.

It comprises 23 action-oriented global targets for urgent action over the decade to 2030. The actions set out in each target need to be initiated immediately and completed by 2030. One of the key targets in the framework is Target 3, also known as 30x30. [2]

Kunming-Montreal Global Biodiversity Framework (KMGBF) Target 3

Ensure and enable that by 2030 at least 30% of terrestrial and inland water areas, and of marine and coastal areas, especially areas of particular importance for biodiversity and ecosystem functions and services, are effectively conserved and managed through ecologically representative, well-connected and equitably governed systems of protected areas and other effective area-based conservation measures, recognizing indigenous and traditional territories, where applicable, and integrated into wider landscapes, seascapes and the ocean, while ensuring that any sustainable use, where appropriate in such areas, is fully consistent with conservation outcomes, recognizing and respecting the rights of indigenous peoples and local communities, including over their traditional territories.

The 30x30 target calls for the expansion and enhancement of protected and conserved measures.

Three main measures for management are described to achieve this aim:

A. **Protected areas**: the Convention on Biological Diversity (CBD) defines a protected area as a geographically defined area which is designated or regulated and managed to achieve specific conservation objectives. The International Union for Conservation of Nature (IUCN) has developed a set of generalised protected area management categories to assist in the development and understanding of protected area systems across different national contexts and legal systems.

B. **Other Effective Area-based Conservation Measures (OECMs):** These are geographically defined areas other than a protected area, that are governed and managed in ways that achieve positive and sustained long-term outcomes for the in-situ conservation of biodiversity, with associated ecosystem functions and services and where applicable, cultural, spiritual, socio-economic, and other locally relevant values.

C. **Indigenous and traditional territories:** Indigenous peoples and local communities are often the owners, occupiers and/or managers of areas with unique and significant biodiversity. By recognizing these areas that have an intricate relationship with IPLCs, decisions by any actors must therefore respect their rights, particularly ensuring the principle of Free, Prior, and Informed Consent (FPIC).

Recognising the urgency of conservation efforts, Kenya committed to protecting 30% of its terrestrial ecosystems by 2030, aligning with the KMGBF.

2. Finance-and-Biodiversity-COP15.pdf (unepfi.org)

1.2. Project Finance for Permanence (PFP) - a Sustainable Finance Initiative

Project Finance for Permanence (PFP) could play a fundamental role in Kenya achieving the 30x30 goal by providing the necessary financial support to achieve target 3.

Project Finance for Permanence (PFP) is an innovative approach to permanent and full funding of conservation areas. It creates financial sustainability, supporting ambitious conservation goals and attracting major financial commitments from partners. The model has already been applied to conservation initiatives in Brazil, Canada, Columbia, Costa Rica, Peru and Bhutan.

A signature component of the PFP approach is a single closing that delivers pledged funds when conditions for permanence are met, which serves to motivate the parties and draw out new resources and commitments. PFP initiatives address an issue often seen in the conservation community: piecemeal or insufficient funding for the management of conservation areas.[3]

Figure 3. Outline of the PFP process.[4]

To achieve their full potential, conservation areas need to be well designed, well managed, politically supported and sustainably funded.

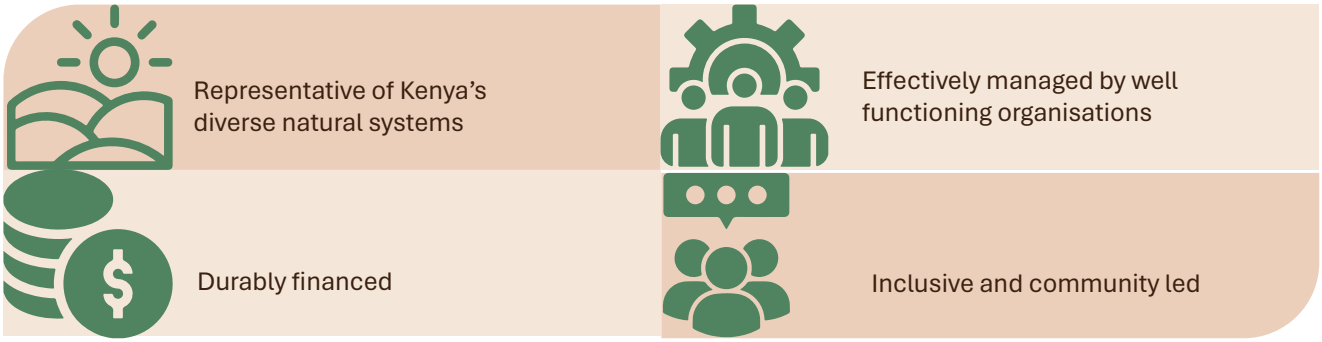
Project Finance for Permanence (PFP) and other forms of sustainable finance are a key part of the solution to these challenges and can provide a means for permanent and full funding of conservation areas.[5]

3. WWF_Peru PfP Prospectus_R8 ReaderSprds.pdf
4. The PFP_report_on_lessons_and_outcomes.pdf (worldwildlife.org)
5. The PFP_report_on_lessons_and_outcomes.pdf (worldwildlife.org)

1.3. An Iterative Prioritisation Method for 30x30

Target 3 calls for the expansion and enhancement of protected and conserved measures. To help Kenya reach its 30x30 commitments an iterative process has been applied to identify areas and activities to include in the final Conservation and Community Plan - identified in Figure 2.

All activities carried out under Target 3 must be done by recognizing and respecting the rights of Indigenous Peoples and local communities and via a process that will ensure the investments meet the 30x30 goals of conserving a network that is REDI.



1.4. Conservancies, Land-Use and Land Management across Kenya

What is a Protected Area?

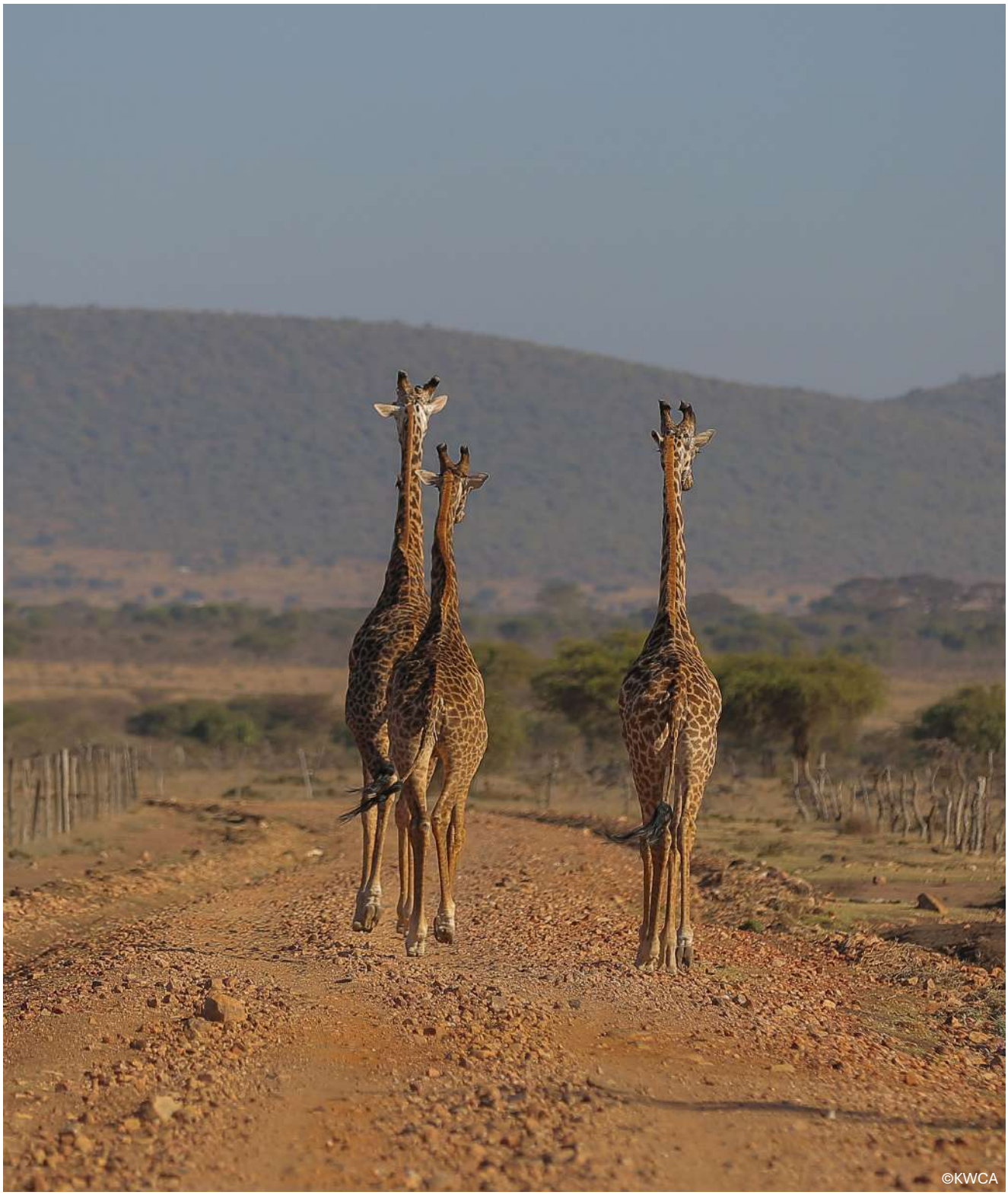
According to IUCN, a protected area constitutes 'a clearly defined geographical space, recognized, dedicated and managed through legal or other effective means, to achieve long term conservation of nature with associated ecosystem services and cultural values'.

Different Types of Protected Areas in Kenya

Protected areas in Kenya are divided broadly into three categories according to the land ownership:

- Public
- Community
- Private

Governance arrangements (i.e. management institutions) of these areas may vary and are either managed by the Government, Private, Community institutions or co-management arrangements (e.g. partnerships between Government and Community such as Community Forest Associations).



Public Land	Public Land Community/Private land
National Park: an area of land or sea dedicated to the protection and maintenance of biological diversity, and of natural and associated cultural resources, and managed through legal and other effective means. Managed by Kenya Wildlife Service (KWS).	**Wildlife Conservancy:** an area of land set aside by an individual Land-owner, body corporate, group of owners, or a community for purposes of wildlife conservation.
Marine Park: a protected marine area where no fishing, construction work, or any disturbance is allowed. Managed by KWS.	**Wildlife Sanctuary:** an area of land or water set aside for the conservation and protection of one or more specific species of wildlife.
National Reserve: an area of land declared to be a National Reserve. Managed by a County Government or KWS.	**Game Ranch:** An area of land where wildlife is kept under natural extensive conditions with the intention of engaging in wildlife conservation, recreation and trade (game- ranching classified as a wildlife user-right; but not a specific land use).
Marine Reserve: a marine protected area where subsistence fishing is permitted. Managed by KWS, Fisheries and co-managed with Beach Management Units	**Game Farm:** An area of land where wildlife is reared in an enclosed and controlled environment for wildlife conservation, trade, or recreation (game-farming classified as a wildlife user-right; but not a specific land use).
Wildlife Sanctuary: an area of land or water set aside for the protection and conservation of one or more specific species of wildlife. Managed by KWS or County Government.	**Private forest:** any forest owned privately by an individual, institution or body corporate
State Forest: all forests on un-alienated government land or land purchased by the Government. Managed by Kenya Forest Service, or KWS; can have co-management with Community Forest Association.	**Protected Wetland:** land with important habitat for wildlife declared as a protected area by the Cabinet Secretary in consultation with the National Land Commission, KWS and legal owner.
Local Authority Forest: a forest that is on land under the jurisdiction of a local authority. Managed by the County Government, can have co-management with a Community forest Association.	**Conservation Easement:** a voluntary conservation area established on private land through a legal agreement, for an agreed upon time period and to conserve wildlife and restrict activities that would adversely affect biodiversity and habitat
Sacred Forest: (e.g. Kaya) a grove or forest with religious or cultural significance to a forest Community. Managed by National Museums of Kenya with Community participation	**A Water Resource Users Association (WRUA)**: is an association of water users, riparian landowners and other stakeholders who have formally and voluntarily associated for the purposes of cooperatively sharing, managing and conserving common water resources. Is a WRUA registered by WRA.
	Beach Management Unit (BMU): management of terrestrial lakes, marine and coastal areas are devolved to communities. Registered under Kenya Fisheries
	Community Forest Association- CFAs are legally registered entities which will allow communities to enter co-management arrangements with central and local governments in order to manage forest resources.

Table 2. Overview and definitions of different types of protected areas in Kenya and their typical governance arrangements.

1.5. The Potential Role of Conservancies in 30x30

Community and private lands offer the best opportunity to achieve the 30x30 target, given the limited availability of public land for expanding government-protected areas. Conservation efforts must, therefore, integrate 'human' landscapes that support indigenous people and local communities, and respect their livelihoods, rights, and values.

Investing in the establishment of new conservancies and to provide support for existing conservancies, where local communities or land owners desire to create a representative and connected conserved area network, is paramount to enable the Country to meet the 30x30 requirements.

1.6. An Introduction to Conservancies in Kenya

1.6.1. What is a Conservancy?

Conservancies, as defined by the Wildlife Conservation and Management Act of 2013, are areas set aside by individuals, groups, or communities for wildlife conservation. The foundational belief is that with the right support, incentives, and policy frameworks, communities and landowners can become effective stewards of wildlife conservation.

However, the latest definition, which is more broad than the definition in the Wildlife Act, and now adopted by KWCA, is:

"A conservancy is an area of land governed and managed by a community, private, individual, institution or group of private landowners with the goal of conserving wildlife and other natural resources while creating community development and benefits for its members."

1.6.2. The Scope of Conservancies

The benefits derived from conservancies extends far beyond wildlife conservation, as illustrated in Figure 4 and have proven to be important catalysts of ecological, socio-economic, ecological and governance changes.

Over 65% of Kenya's wildlife live in community and private lands. Conservancies provide connected landscapes that complement national parks and reserves while enabling communities to benefit from wildlife management and in turn, be at the heart of championing conservation efforts.

Conservancies have broad goals. Conservancies integrate multiple functions including establishing governance institutions for effective land and resources crucial for wildlife and people and maintaining rangeland practices to uphold livestock management through strategies like grazing management and market development. They also focus on promoting community cohesion, improving community infrastructure such as water, health, and education. Conservancies facilitate human-wildlife conflict mitigation, assist in anti-poaching efforts, and provide migration corridors and habitats for wildlife.

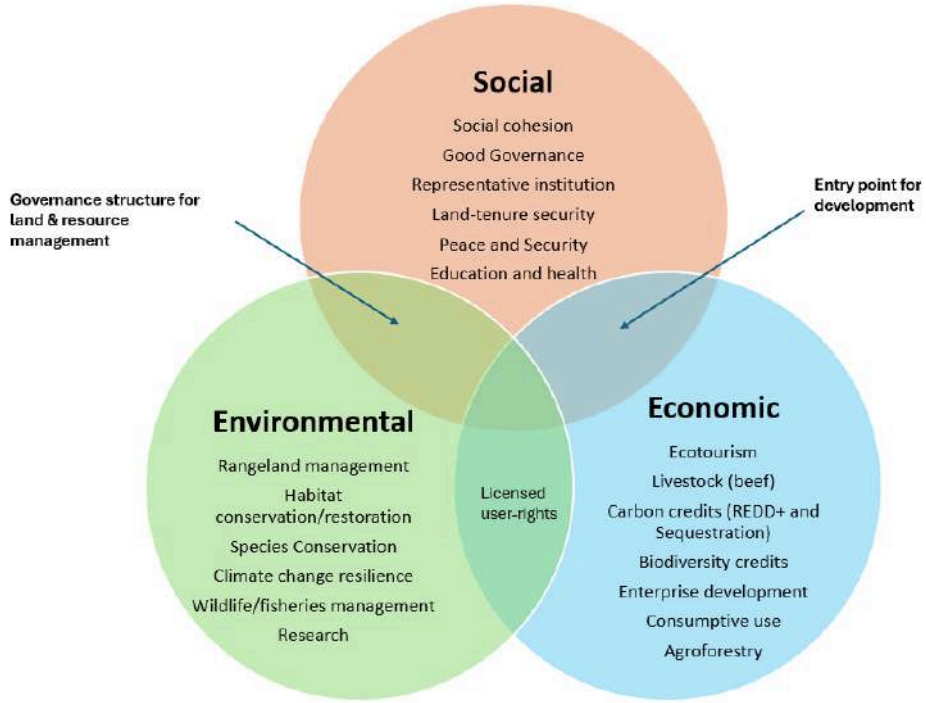


Figure 4. Benefits derived from Conservancies.[6]

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1.6.3. A Brief History of Conservancies in Kenya

The concept of conservancies in Kenya traces back to the early 1990s, marking a significant shift towards non-state protected areas on private and community lands. Over the years, community and private conservancies flourished, through innovative practices, by the Wildlife Conservation and Management Act of 2013 and with support from conservation organizations, development partners and tourism investors.

Conservancies continued to expand, with the establishment of the Kenya Wildlife Conservancies Association (KWCA) in 2013, and their recognition under the Wildlife Conservation and Management Act, 2013.

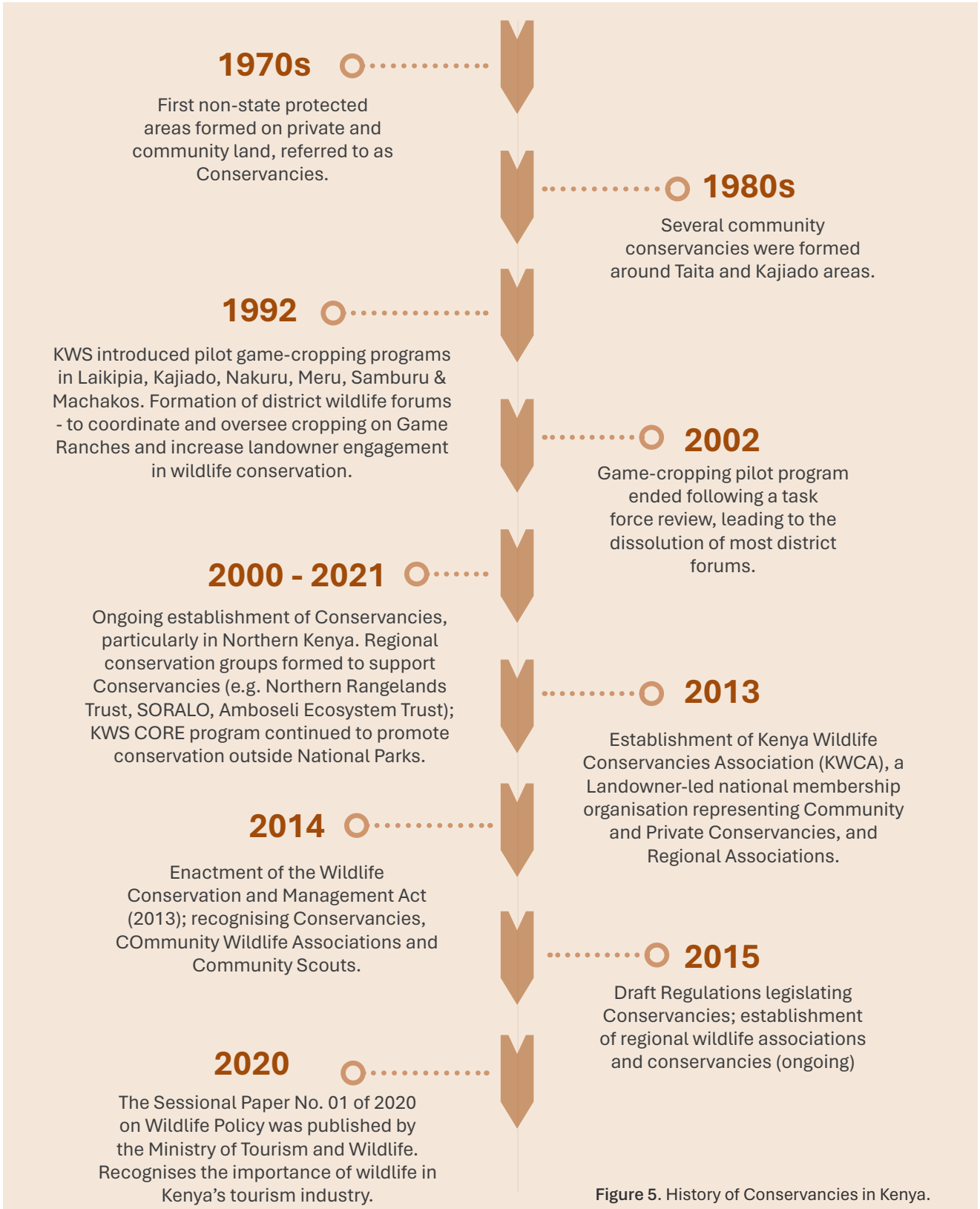


Figure 5. History of Conservancies in Kenya.

1.6.4. Types of Conservancies

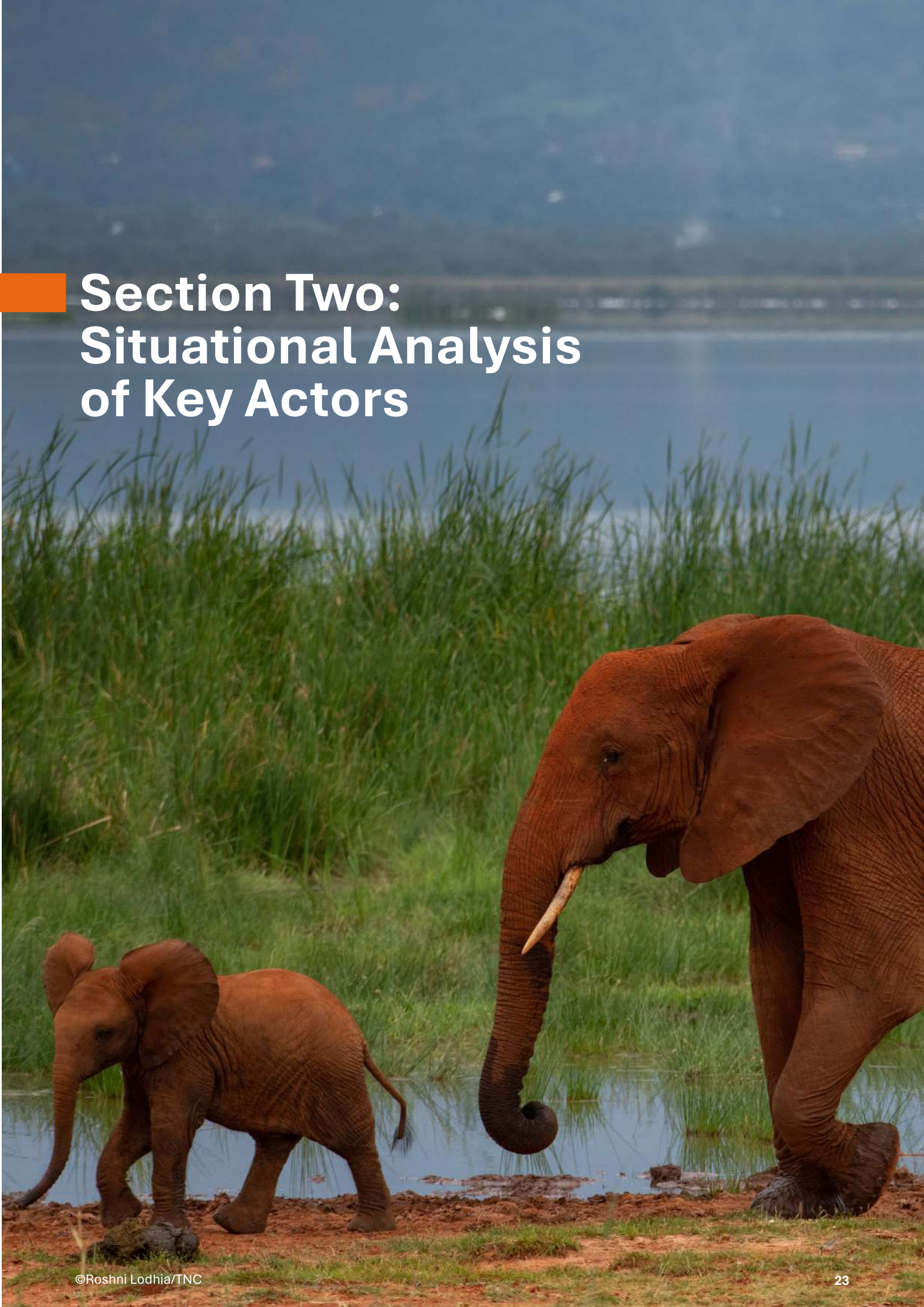
Types of conservancies are primarily recognized based on land ownership and land-use arrangements. In cases where conservancies may be situated on public land, where communities hold customary or traditional rights of access or resource use (e.g., marine areas, forest reserves, and national reserves), co-management arrangements with relevant government authorities apply. Figure 6 shows the definitions used for the different types of conservancies.

Private Conservancy	Set up on privately owned land, and governed and managed by individuals, non-profit organizations, or corporations. The conservancy sets its own governance structures, staff and financial sustainability strategies.
Group Conservancy	Adjacent private landowners pool their lands to establish a single conservancy. The group conservancy is often governed by registered land-holding companies co-owned by all landowners Management of the conservancy is mainly contracted to management firms or individuals. The governance structure is through democratically elected landowners, and benefits are often distributed equitably via a Trust.
Community Conservancy	Established by the community on community land. The conservancy democratically elect the governance structure and create sub-committees responsible for community priorities such as conservation, grazing, tourism, and finance. They determine benefit-sharing mechanisms and oversee conservancy management.
Co-managed conservancy	An arrangement between a government agency/authority and community or private person/persons to conserve specific public land.

Figure 6. Types of conservancies in Kenya.

Conservancies vary in their governance and management models. The governance typically involves a conservancy board, which is a central decision-making body consisting of democratically elected representatives that has equitable inclusion from various partners, settlement zones, ethnic groups, women and youth. Local decisions and management efforts are predominant, with other non-landowner stakeholders participating as partners in various ways, as demonstrated by this review.

Section Two: Situational Analysis of Key Actors



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Building on the KWCA State of Wildlife Conservancies in Kenya Report (2016)[7], this section provides an overview of the current status of the conservancy landscape in Kenya - including a situational analysis of the key actors intrinsically linked to a conservancy's potential impact.

Key Actor 1: Conservancies

A holistic situational analysis of conservancies was carried out via three different methods:

1. Updates to the spatial database for all land that was managed in a conservation-compatible way, including conservancy type, status and governance model.
2. The baseline survey - the aim of which was to understand the status and potential of conservancies in Kenya and to guide the prioritisation of potential Project Finance for Permanence investments into conservancy networks.
3. Deep dive interviews with Conservancy Managers, building on the baseline data, to build a substantial evidence base for the prioritization of needs as a conservancy moves through the different growth stages identified in Table 3.

Key Actor 2: Private Sector

A situational analysis of the private sector was carried out to critically assess the best financing opportunities, which are not only attainable for most conservancies but also scalable and required to significantly contribute to the overall financing gap needed to reach 30 x 30.

Key Actor 3: Landscape Associations (LAs)

The provision of support across the different LAs was analysed in accordance with conservancy feedback, along with the scope of their role - specifically in relation to the allocation of resources, mainly technical assistance and funding.

Key Actor 4: Households

A situational analysis of the benefits derived from conservancies at a household level to the communities living within or adjacent to conservancies. Both monetary and non monetary benefits were considered along with the potential impact if all conservancies were operating at an optimal level.

7 KWCA State of Wildlife Conservancies in Kenya Report (2016)

Key Actor 1: Conservancies

2.1. An Updated Conservancy Spatial Database

Spatial data of conservancies plays a crucial role in enhancing our understanding of conservancies, supports evidence based conservation and contributes to the long-term health of ecosystems and species. It informs decisions on land use planning, resource allocation and can guide the design of wildlife corridors.

As part of the situational analysis on conservancies the conservancy spatial database was updated with the most up-to-date information from KWCA and LAs across Kenya.

The LAs act as umbrella bodies for groups of conservancies, representing them at the national level, and sometimes providing various forms of assistance to individual conservancies.

This spatial database is 30x30 specific, and not all the areas that are now included may be classified as conservancies, as strictly defined by the Wildlife Act. Instead, the objective of this spatial database was to gather specific details for all land management that was managed in a conservation-compatible way.

Full details of the conservancy's spatial data was provided alongside this report as a spatial data-set, with a new version available on the Sustain East Africa Github repository.

2.1.1. Defining Conservancy Status

Conservancies in Kenya are at different stages of development and can be categorised as follows (see Table 3 for full definitions of each category):

- Dormant
- Uncertain
- Proposed
- Emerging
- Early Operational
- Mature Operational

2.1.2. The Importance of Conservancy Growth Stages

To understand the type of cost and timing of when it is needed, KWCA stratifies conservancies into different stages of their growth. This establishes the different funding and technical support required. The journey of a conservancy development, from an idea to fully functional, can take up to 15 years. During this time, long-term, patient, and flexible funding support, investment and technical assistance are needed. Those conservancies that aren't able to gain support with technical assistance and funding are expected to become stagnant in a lower growth stage.

Growth stages are determined by a set of criteria outlined in Table 3 and reflect a structured approach to developing conservancies, allowing communities to advance from initial concepts to fully operational and sustainable conservation entities.

The status of the conservancies acts as an archetype to understand conservancies' needs, financing mechanisms and technical assistance required.

Mature Operational - A New Growth Stage

Mature Operational is an additional growth stage that was included to overcome some of the vast variability identified via the baseline research in the 'operational' growth phase.

Including **'mature operational'** as the final stage of growth creates differentiation between those conservancies that are mostly self-sustaining with multiple, complimentary revenue streams, in addition to a fully established management team and those 'early operational' conservancies that are inhibited by clear gaps in management capacity and are working towards expanding their revenue streams to become self funding.

From the perspective of the 30x30, this split in definition is important for creating more tailored technical assistance packages and financing mechanisms that could be utilised by a mature conservancy - such as concessional debt and corporate management structures.

	Definition	Statistics
1) Potential Conservancy	An area of land where the community and landowners has identifies potential to be managed as a conservancy. Landowners are yet to be mobilised.	
2) Proposed Conservancy	Community or landowners have resolved to include conservation objectives around land management. A legal entity, governance and management actions are not established.	**97** Conservancies **2,886,400 ha** **5.0%** of Kenya
3) Emerging Conservancy	A conservancy with an established legal entity and nascent governance structure. Management may be partially developed but implementation of management actions remains ad hoc.	**70** Conservancies **5,430,700 ha** **9.4%** of Kenya
4) Early Operational Conservancy	A conservancy governed by a legally established entity, with an active board and management partially established. Some programs implemented through conservancy management plan.	**136** Conservancies **4,610,300 ha** 7.9% of Kenya
5) Mature Operational Conservancy	A conservancy governed by a legally established entity, governed by an active board and with management fully established, and programs implemented through a conservancy management plan and professional management team that is mostly self-funded through a diverse set of revenue streams.	**39** Conservancies **553,600 ha** **1%** of Kenya

Table 3. Definitions of conservancy categories, their current numbers and areal extent.

245 Functional Conservancies
10,611,461 ha
18.3% of Kenya

2.1.3. Status of Conservancies

Since the last significant update to the spatial database of conservancies in Kenya, in 2016, there has been a significant increase in the creation and development of conservancies in Kenya, demonstrating an increasing dedication to wildlife conservation and responsible land utilisation.

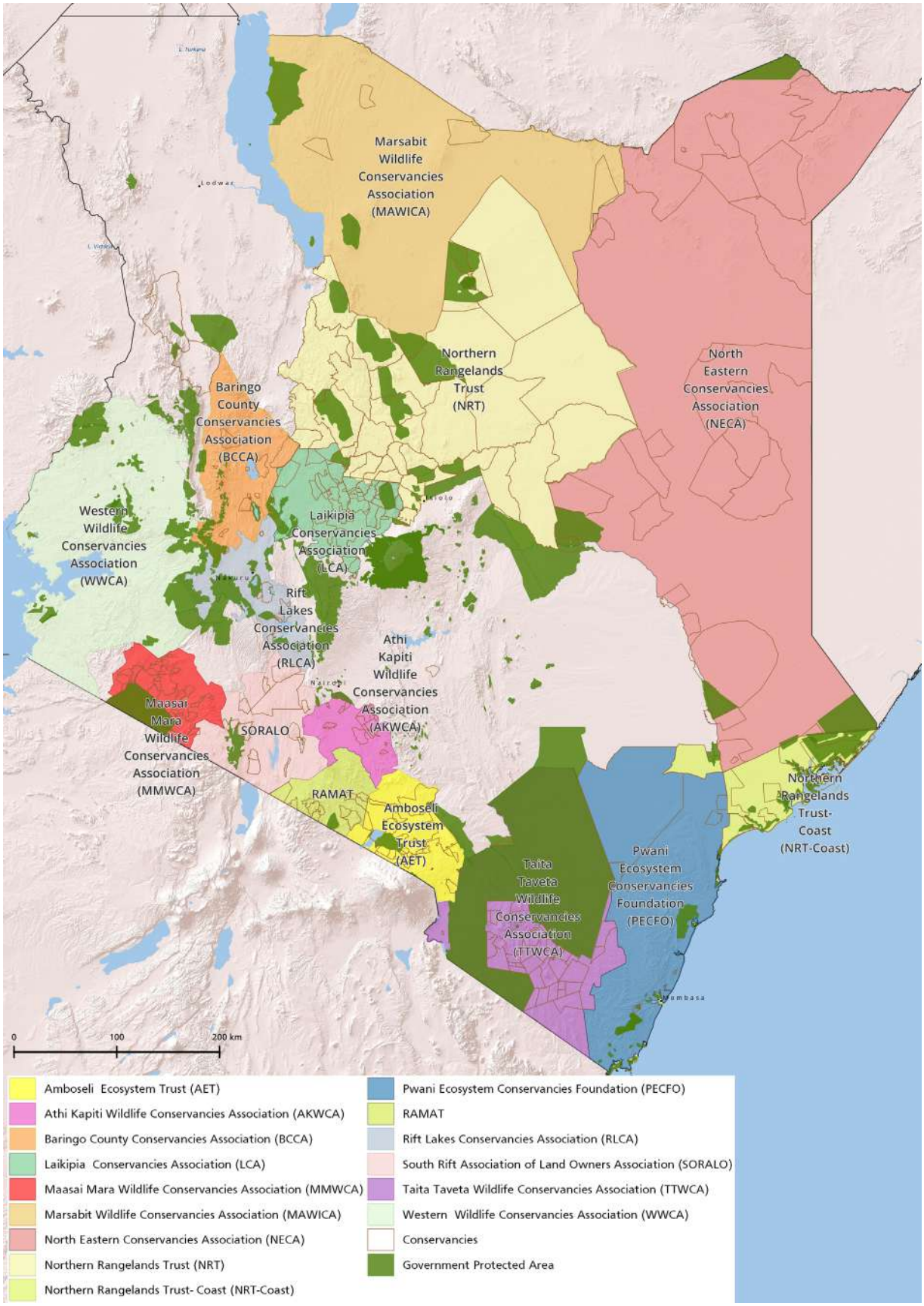

Figure 7. All conservancies across Kenya as of 2023.

Key Findings

Growth in Active Conservancies: Increased from 160 to 245 conservancies (mature, operational or emerging).

Expansion of Conservation Land: Grew from 6.36 million hectares in 2016 to 10.61 million hectares. Now covers 18.3% of Kenya's land.

Potential to Achieve 30x30 Target: Combining conservancies with government-protected areas could help meet Target 3 of the Kunming-Montreal Protocol. Current land management status:1% well-managed and durably financed (mature).7.9% reasonably well-managed (operational).

Proposed Conservancies: Over 90 proposed conservancies. Could increase conserved land to 13.86 million hectares. Combined, proposed and existing conservancies would cover 23.9% of Kenya's land.

Regional Growth:

- **North Eastern Region:** 23 proposed new conservancies (North **Eastern Conservancies Association, NECA).**
- **Western Region:** 31 proposed new conservancies (Western Wildlife Conservancies Association, WWCA).
- **Athi-Kapiti Wildlife Conservancies Association (AKWCA):** Added 7 operational conservancies, totalling 10.
- **Northern Rangelands Trust (NRT):** 9 new emerging conservancies.

Challenges: Statuses of many new conservancies are uncertain. Some new conservancies yet to show significant conservation impact.

Importance in 30x30 Process: Potential importance of all conservancies emphasized for the Project Finance for Permanence (PFP) initiative and achieving the 30x30 target.

It is worth noting that these data include many early-stage conservancies and other conservancies that are not registered with KWCA.

Status	Area (ha)	National Percentage
Mature	553,600	1%
Operational	4,610,773	7.9%
Emerging	5,447,088	9.4%
Proposed	2,886,400	5%
Uncertain	359,500	0.6%
Dormant	Unavailable	Unavailable
Total	13,857,361	23.9%

Table 4. The status, area, and national percentage of land occupied by conservancies in Kenya.

2.1.4. Estimating Impacts on People with Updated Spatial Data

Based on the updates to the spatial database, it is now estimated that over 1.3 million people live in or directly adjacent to conservancies that are currently implementing conservation activities.

The potential impact of conservancies on households in the near future is significant, with a further 1.2 million people estimated to live in or directly adjacent to conservancies that are proposed or non-operational.

As these conservancies develop, nearly 5% of Kenya's population could be living in and around conservancies, and potentially benefiting from their impact on the environment and local economy.

2.2. Baseline Outcomes

By building on the data collected by KWCA in 2016, baseline data was collected in 2023/2024 from a comprehensive survey which set out to update the status and potential of conservancies in Kenya and prioritise potential 30x30 investments into the conservancy network.

Objectives of the survey were to:

- Compile updated data on Kenya's conservancies
- Evaluate and quantify Kenya's "conservation financing gap"

Below we provide a highlight of the findings in the Baseline Report which accompanies this document.

2.2.1. Baseline Outcomes - Governance

Governance markers for conservancies are generally positive, as illustrated below through the establishment of legal entities, board structure and representation. However, accountability and transparency measures need to be improved.

Governance - Key Findings

- A governance body exist for most conservancies with legal entities changing over time.
- Conservancies are largely community led and gender balance on boards is improving.
- Communication and transparency needs to be enhanced.
- Demarcated boundaries are a requisite for increasing maturity.

Legal Entity

The vast majority of proposed and emerging conservancies are currently registered as community-based organizations or self-help groups. As conservancies mature, however, there is an observed shift towards registration as a private company (limited by shares or guarantee). This observed increase in private companies and/or trusts likely provides more operational freedom to mature conservancies.

Board Structure

The majority of conservancies in Kenya reported having some form of board or committee structure (92.2%, corresponding to 154 of n = 167 responses). Female board representation currently appears highest in proposed conservancies, which report an average value of 35.2% women on their boards or conservation committees. In total, 83 women were reported as board members of proposed conservancies, 182 women across emerging conservancies, 216 women across operational conservancies, and 77 women across private conservancies.

Transparency and Accountability

Annual general meetings (AGM) are held infrequently, as only 62.3% (n = 162) of conservancies held an AGM in 2022. Further support is likely needed for conservancies to improve transparency and accountability via good communication with their members and to help increase meeting frequency. This is exemplified by the lack of a stakeholder engagement plan for many conservancies (61.6%, n = 159).

Demarcation

As conservancies mature, external boundaries are increasingly demarcated to ensure clear areas of management and operations, a key tenet of good governance.

2.2.2. Baseline Outcomes - Management

Management - Key Findings

- The majority of conservancy managers have less than ten years of experience in their current roles.
- Management capacity across Kenya is hugely varied - depending on conservancy type and stage of growth.
- Less than 40 conservancies have registered with KWS, and even fewer have the management plans gazetted restricting legitimacy and management capabilities.
- Approximately 40% of conservancies across Kenya reported more than 100% local recruitment.
- The majority of conservancies are recorded to share benefits with community members.

Registration with KWS and Management Plans

Conservancies are required to register with KWS once they have established a legal entity. A conservancy's management plan is then to be developed once objectives are established and structures are put in place. Ideally, two years will be required for conservancies to develop their plans post-registration. However, less than 40 conservancies have registered with KWS, and even fewer have the management plans gazetted, severely restricting legal holdfast and management capabilities.

Management Capacity

Conservancy management team sizes vary by conservancy type and operational maturity. Early-stage conservancies experience reduced management capabilities in finance and operations. Management capacity, as denoted by team size, increases with conservancy status, as one would expect. A strong belief in the skills and competence of senior leadership teams was demonstrated in relation to conservancy maturity, shaping a positive outlook for conservancy management overall. However, the majority of conservancy managers have less than ten years of experience in their current roles but most have typically acquired relevant management experience in alignment with their educational background.

Community Impact

Local employment, by means of local recruitment, is indicated in conservancies. Approximately 40% of conservancies across Kenya reported more than 100% local recruitment. As per conservancy type, co-managed conservancies attain 100% local recruitment, followed by community conservancies (82.5%), group conservancies (71.2%), and private conservancies (70.7%) respectively. The majority of conservancies are recorded to share benefits with community members. Conservancies report between 10-40% of annual operational funding used for direct payments to land-owners (highest in group conservancies) and 5-30% on community development projects (highest in community conservancies).

2.2.3. Baseline Outcomes - Economics

Economics - Key Findings

- A number of conservancies are financially viable, relying largely on tourism funding.
- Revenue is severely limited to certain geographies, conservancy types and status.
- Financial planning, financial management, and budgeting is under-developed in early-stage conservancies.


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Revenue Streams

Across Kenya, we encounter four main revenue streams on which conservancies rely, namely tourism, carbon, livestock, and donor support. Tourism was reported as the bulk of revenue at USD 26,693,257 annually. This is seconded by annual donor support (USD 6,966,677), annual carbon earnings (USD 4,631,676), annual livestock earnings (USD 2,597,189), amounting to USD 40,888,799 annually.

Large disparities exist for different revenue streams, especially in terms of the number of conservancies which benefit from reliable income sources; conservancies reporting to earn more than 10,000 USD from an individual revenue stream are low, and include those generating income from tourism (n = 31), carbon (n = 18), livestock (n = 16) and donor support (n = 31).

Operational Expenditure (OpEx) - General

Across conservancies, more than KES 4,202,664,186 or USD 32,081,406 was reported as spent in 2022 on their activities including paying salaries, paying landowners, running development projects, implementing grazing plans, and preventing human-wildlife conflict. Accounting for those conservancies that have not reported expenditure data, this amount could add to as much as KES 8,847,820,948 or USD 67,540,617.93.

Operational Expenditure (OpEx) - Rangers

In terms of operational expenditure, rangers form the core of the employees of any conservancy and are often recruited from the local community and provided employment and benefits. At current, 3,650 rangers are recorded as working in conservancies in Kenya, with an estimated 5,547 in total working across the country. This is estimated as a total annual salary payment of KES 845,854,650 or USD 6,407,989 paid annually to communities in some of the most deprived parts of Kenya. Our larger estimated number of rangers would indicate KES 1,285,467,327 or USD 9,738,388 paid annually to employees. This economic impact would likely vastly increase as conservancies develop and mature, and their operational budgets and payroll size increase over time.


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2.3. Deep Dives Building an Evidence Base

Building on the baseline data, the aim of the deep dive interviews with conservancy managers was to further understand what needs, financing mechanisms and technical assistance is required as a conservancy journeys from inception to maturity. At each growth stage the realms of management, governance and the financial capabilities have been assessed to identify where gaps currently exist and where support is required for conservancies to become self-sustaining and operating optimally.

The deep dive sample consisted of 26 conservancies at different stages of growth and across a broad geographical range. The deep dives provided a better understanding of the nuanced development process, and the requirements at each stage of conservancy development and growth. This will help to ensure that any support provided is tailored to specific requirements.

Deep Dive Sample of Conservancies (Stage of Growth and Conservancy Type)

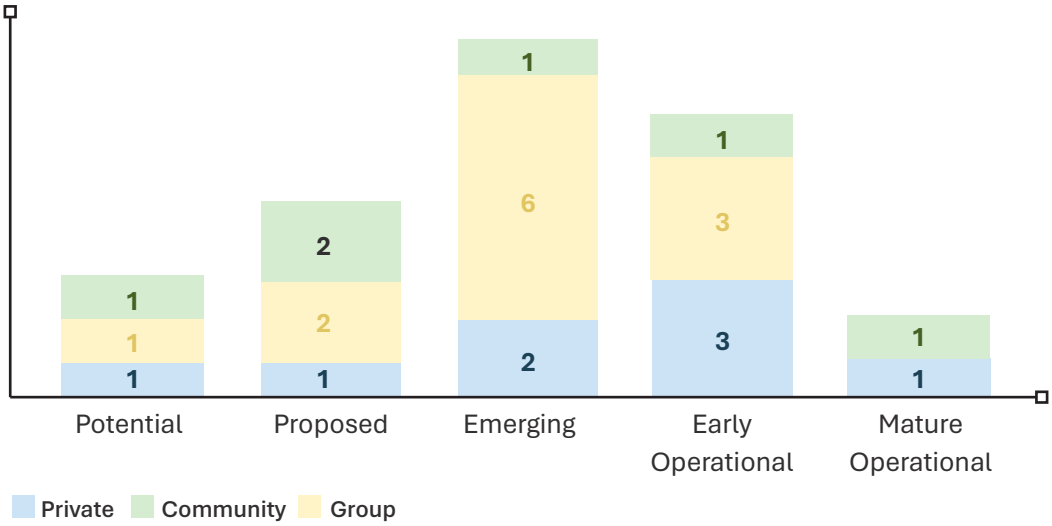


Figure 8. Sample size and status of conservancies included in the deep-dive analysis.

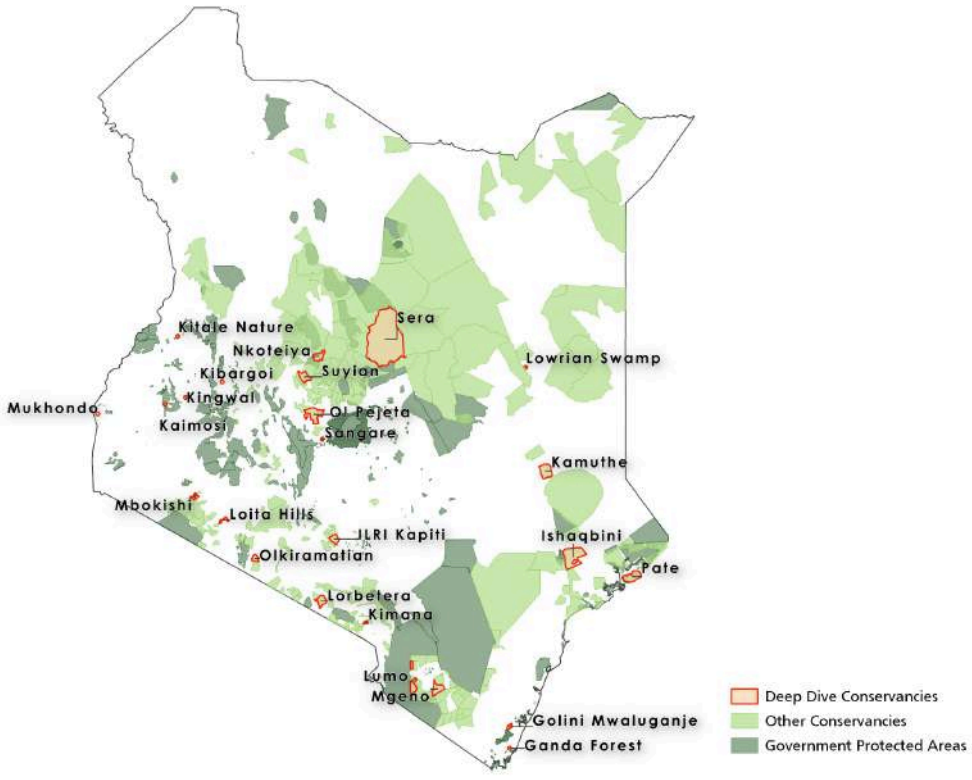


Figure 9. Map of Kenya depicting conservancies included in the deep-dive analysis.

2.3.1. Evidence Informed Needs - Establishing a Conservancy

This section of the report focuses on the evidence informed needs identified by conservancy managers at each stage of a conservancy's growth journey. Proposed support strategies tailored to each specific growth stage are also presented in this section.

GROWTH STAGE: PROPOSED				
A conservancy where the community or landowners have resolved to include conservation objectives in the land management, but a legal entity, governance and management actions are yet to be established.				
Governance Characteristics	**Management Characteristics**	**Financial Sustainability**	**Communication and Branding**	**Performance Monitoring and Evaluation**
No formal legal entity. Some community consensus but no governance structure. No board or committee	No management structures are in place. No formal programs or plans	None	None	None

Table 5. Growth Stage: Proposed

Building Consensus

Establishing and managing a conservancy is a complex process and involves many intricate steps. Building partnerships is crucial for success, these provide technical assistance and funding. Finding key partners to lead the early stages is particularly difficult for community and group conservancies as there is a notable absence of formalized technical assistance and funding opportunities during the initiation phase. Sources of technical assistance exist and mobilizers seek help from various actors, relying heavily on landscape associations, NGOs, KWCA, and KWS.

Lack of funding is a major challenge for conservancies starting up, especially without having identified a lead partner. Without guidance, communities oies within Kenya, which are highly beneficial for consensus building. The type and frequency of these activities depend on the available funding.

The case studies below serve to highlight the variance in support received by two different community conservancies and how it has impacted their progression in growth.

Case Study: A Proposed Conservancy with no Technical Assistance

Lorian Swamp Wildlife Conservancy, proposed community conservancy in Wajir County, established in 2022. The area has unique ecosystems playing a vital role in the region's biodiversity.

The **key motives** for establishing the conservancy by the community is to improve environmental management and resource utilization and to address key challenges such as deforestation and human wildlife conflict.

Despite having registered with their landscape association, **no financial support or technical assistance received.** Establishment efforts are led by a Board Director who covers most expenses out of pocket. **Conservancy Manager works on a voluntary basis.**

Land tenure: No title deeds are in place for this community land – creating uncertainties regarding ownership, despite having a register of landowners.

Key challenges include, **lack of knowledge and expertise in conservancy management, high illiteracy levels amongst community members and the board, land tenure issues** and of course, **financial constraints.**

Case Study: A Proposed Conservancy with Substantial Technical Assistance

- Mgeno has undergone a long transitional journey from when it was established as a ranch in 1971 - through to, officially certified community conservancy, which was obtained in May 2023. Livestock rearing is still core in the business plan for the conservancy – inherited from its earlier ranching status. Other key revenue streams include donor funding and carbon.
- The transition journey attracted support from stakeholders such as KWCA, KWS, WWF, and TTWCA who spearheaded this process.
- These partnerships were described as "instrumental" in their transitional journey – from providing technical assistance to help build consensus, financial support through the global pandemic and funding for certain infrastructure.

2.3.1.1. Proposed Support Strategies

Proposed conservancies will primarily benefit from building consensus to support key leaders and mobilizers. As conservancies establish, they will need to identify suitable partners (LAs, KWCA, NGOs, etc.) and build sustained relationships (community and group conservancies in particular).

Resolving issues pertaining to land tenure by clarifying and documenting land ownership, boundaries, and potential legal entities is fundamental and of a high priority at this stage.

Growth Stage	Strategy	Description	Priority	Finance Mechanism	Technical Assistance Mechanism	Policy Need
Proposed	Building Consensus	Building consensus with support to key leaders/ mobilizers Identify partners (landscape associations, KWCA, NGOs, etc) and build sustained relationships (community and group conservancies in particular).	High	Development & Leadership Grants	Via Landscape Associations	
	Unclear land tenure	Clarify and document land ownership Clarify boundaries Clarify potential legal entity	High	Development & Leadership Grants	Via Landscape Associations, Land Office Improvements	Simplyfy land registration process

Table 6. Evidence-informed needs outlined for proposed conservancies.

2.3.2. Evidence Informed Needs - Formalisation and Growth

GROWTH STAGE: EMERGING				
A conservancy with an established legal entity, with a nascent governance structure. Management may be partially developed but implementation of management actions remains ad hoc.				
Governance Characteristics	**Management Characteristics**	**Financial Sustainability**	**Communication and Branding**	**Performance Monitoring and Evaluation**
A basic legal entity, often a Community-Based Organisation. A basic board or committee may be in place, but governance is not fully formalised	At least one person overseeing basic operations. Initial management plans but often ad hoc	Limited or uncertain	Not well-defined. Communication may be informal	Minimal monitoring and evaluation

Table 7. Growth Stage: Emerging

Context: Support Provision and Funding

The success of a conservancy in the foundational stage is largely dependent on the backing that the LA can provide in terms of funding and technical assistance or through establishing links with philanthropic funders.

Support from these organisations appears to be hugely inconsistent across the conservancy landscape – with some conservancies having benefited greatly from such support while others are unable to progress due to limited access to start-up funds and so remain nascent for a longer period than they should.

Even when available, startup funding often has significant limitations - failing to align with the needs of communities or support long-term development. The reporting and accountability criteria might also be beyond the scope of most conservancies in their infancy, with recipients often required to submit progress reports, financial statements, and other documentation to demonstrate how funds are being used. This can add administrative burdens and increase the workload for conservancy staff, who in the early phase of development and will likely be operating in an informal, mobile capacity and in need of technical assistance to complete the application process itself.

Creating Governance Structures

Creating good governance structures is key at this foundational stage and without financial sustainability funding sources are highly sought after, along with strong technical assistance to navigate certain key steps.

Formation of a Board

Conservancies with strong partnerships (KWCA, LAs, government) form boards earlier. Most conservancies initially operate as committees rather than boards. Technical assistance provided by KWCA, LAs, Government, NGOs etc is a key driver in the early formation of boards. Those conservancies that can access it create better governance structures early on. Provision of technical assistance is currently highly variable across the conservancy landscape.

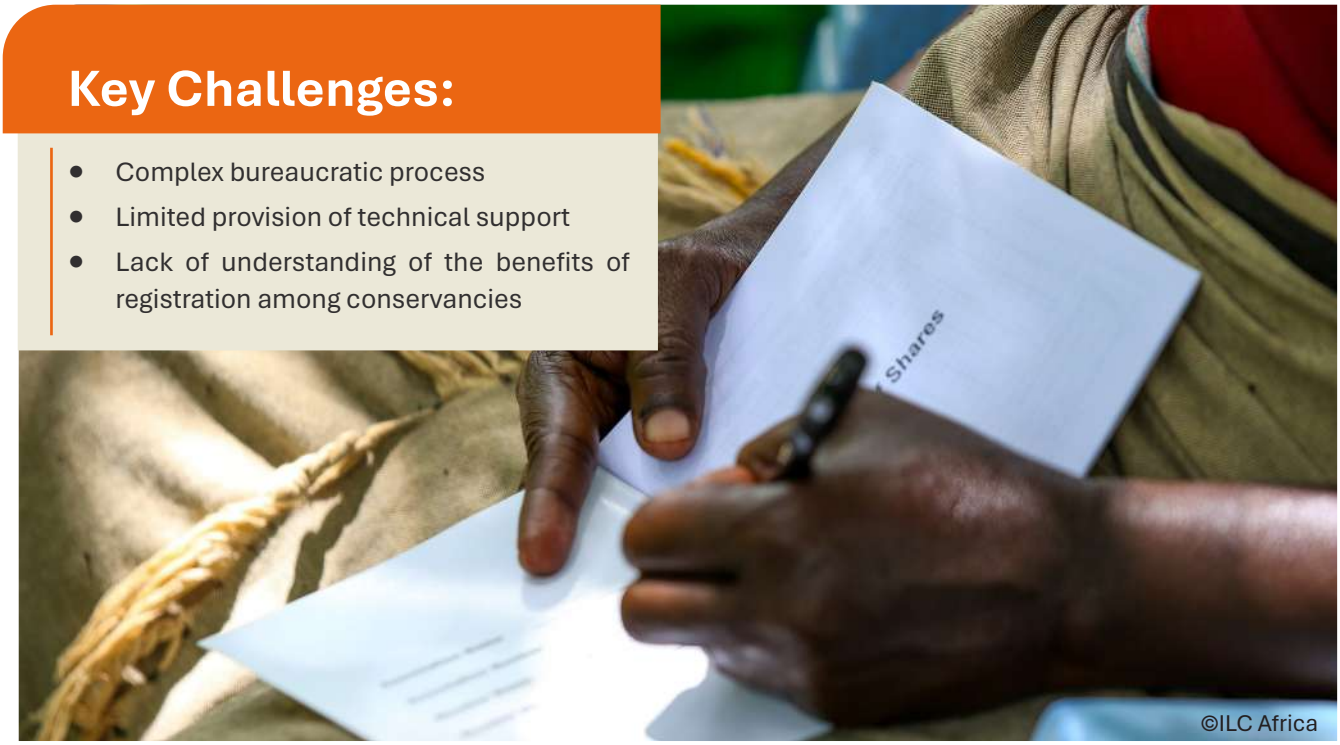
Gender inequality persists in board representation but conservancies with strong ties to KWCA, LAs, or government have better representation of women, youth, and people with disabilities on boards.

Registering with the Kenya Wildlife Service (KWS)

Low registration rates are observed across conservancies in Kenya, only 10% of conservancies in the baseline sample are registered with Kenya Wildlife Service KWS. 32% of conservancies interviewed found the registration process challenging and complex. This may be due to the long duration of the registration process, as registration can take from 1 month to over 5 years, with an average duration of 2 years. Additionally, registration is os at the amount of USD 15.

Key Challenges:

- Complex bureaucratic process
- Limited provision of technical support
- Lack of understanding of the benefits of registration among conservancies



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Establishing a Legal Entity

Establishing legal registration is important for conservancies, as it is necessary for starting operations, employing staff, and entering agreements with partners. Initially, conservancies are often registered as a Community-Based Organization (CBO). Conservancies may later register as stronger legal entities like companies or trusts for entering legal contracts. Legal assistance is required for registering as a Trust or Private Company, typically involving a lawyer. The funding for legal assistance is often dependent on support from landscape associations or NGOs; otherwise, it is funded out of pocket by community members, directors, or landowners. Throughout this process, legal assistance is sought in various forms, indicating a lack of definitive guidance and unequal support across regional associations.

Biodiversity Assessments

Biodiversity assessments are crucial for understanding biodiversity early in conservancy development. They measure certain specified ecosystem components to determine the richness, evenness, and heterogeneity of living organisms in an area. Currently however, biodiversity assessments are often conducted at later stages due to funding constraints. There exists a large need for technical assistance, as over 80% of conservancies in the deep dive sample required assistance for biodiversity assessments. Assistance may be provided by KWS, NGOs, external consultants, and government agencies. However, a lack of guidance is indicated on where conservancies may seek support for biodiversity assessments.

Mapping and Demarcation

Conservancy mapping and demarcation of boundaries on the ground are a vital component for effective management, conflict mitigation, and the conservation of biodiversity among other things. As such, it is crucial for conservancy establishment. Technical Assistance may be sought from government agencies like KWS, local stakeholders, conservation associations, and professional services firms. Funding sources include LAs and private foundations, in addition to those providing technical assistance. However, challenges include a lack of funding, which is the primary reason cited by conservancies that have failed to carry out conflict mitigation processes.

Infrastructure

Despite the fact that infrastructure investment is essential for effective conservancy operations and supporting tourism, key infrastructure such as a headquarters, scout outposts, roads, and radio networks are beyond the scope of most conservancies budgets, especially those in the early stages of establishment. As such, there is a significant reliance on partnerships with NGOs, landscape associations (LAs), or government organizations for funding or access to infrastructure. Conservancies without funding support often operate in a mobile capacity, using makeshift offices like cars or bomas for meetings. Teams at this stage are small (e.g. 1-3 people). Few in this position have a plan on how to secure funds for the implementation of key infrastructure. However, some did have the vision to construct tourismfacilities to create a revenue stream.

Disparities in Infrastructure Support

In 2018 TNC and the USAID funded the establishment of the **Pate Marine Community Conservancy (PMCC)** office, so conservancy staff had a headquarters to facilitate the coordination, planning, and decision-making activities related to conservation efforts.

TNC and NRT funded the creation of a Rangers' Office in 2018 to provide a base for field operations, patrols, and monitoring activities. This has helped to ensure efficient communication and logistics for the ranger team and enhances surveillance, response time, and security.

To further boost security efforts, USAID and TNC funded the acquisition of two patrol boats. In 2022, three motorcycles were funded by TNC and NRT and are used by rangers for land-based patrols, rapid response, and community engagement.

In caparison, conservancies without strong LA support or strong links to NGOs, donor, county government partnerships have extremely limited infrastructure, such as **Kingwal Conservancy,** a community-based conservation initiative located in Nandi County, Chesumei Sub-County.

Kingwal is home to a large population of Sitatunga antelopes. Protecting these antelopes was one of the key motives behind establishing the conservancy, along with enhancing community livelihoods, environmental conservation, and creating employment opportunities.

- Formed in 2014 from a piece of swampland and officially registered in 2018-2019, the conservancy has a membership of around 400 landowners and holds one collective title deed for the entire land.
- The conservancy's primary source of funds is from the community members and depends on the membership subscription fees to run the conservancy.

Key infrastructure to note:

- An office equipped with a computer, laptop, desktop, cabinet, and chairs.
- However, the conservancy lacks vehicles, motorbikes, roads, and fencing around its boundaries.
- They would like to develop ecotourism infrastructure, including watchtowers, campsites, and traditional bandas (huts), to generate sustainable income and the Conservancy Manager is taking the lead in seeking investors through methods such as writing proposals.

2.3.2.1. Proposed Support Strategies

At this stage, improving governance by creating appropriate legal entities, setting up robust governance structures and a board, registering with KWS, mapping and demarcation is paramount. Management may be improved through initiatives to build capacity (i.e. support services, staff recruitment, provision of training), capital expenditure on infrastructure (i.e. HQ, scout outposts, roads, and equipment – vehicles, radio network, etc.), and developing and implementing management plans.

Growth Stage	Strategy	Description	Priority	Finance Mechanism	Technical Assistance Mechanism	Policy Need
Emerging	Improving governance	Creating legal entity Setting up robust governance structures and board KWS registration Mapping and demarcation	High	Development & Leadership Grants Small Grants	Via Landscape Associations based on needs assesment	Simplyfy KWS registration
	Improving management	Capacity Building Initiatives • Support Services • Recruitment of Staff • Provision of training • Salaries to be paid Capital Expenditure on infrastructure (office/Scout outposts/ Vehicles) Management Plan in place and implemented Capacity Building for . Management - e.g. HQ, scout outpost, roads. Equipment - vehicles, radio network Set up monitoring and evaluation systems	High	Development & Leadership Grants Small Grants Technical Assistance Grants via landscape associations Private Sector Starter Grants	Via Landscape Associations, KWS, NGOs, external consultants and goverment agencies, based on needs assessment	

Table 8. Evidence-informed needs outlined for emerging conservancies.

2.3.3. Evidence Informed Needs - Planning and implementing

GROWTH STAGE: EARLY OPERATIONAL				
A conservancy governed by a legally established entity, governed by an active board and with management partially established and some programs implemented through a conservancy management plan.				
Governance Characteristics	**Management Characteristics**	**Financial Sustainability**	**Communication and Branding**	**Performance Monitoring and Evaluation**
Regular board meetings, typically quarterly. The governance structure is transitioning to more formal entities like cooperatives or trusts.	Partially established management processes. Work plans and budgets are developed.	Financially supported but may rely on external funding.	Emerging communication strategy. Partial branding and public relations.	Some systems for monitoring and evaluation

Table 9. Growth Stage: Early Operational

Improving Management Capacity

Many conservancies, regardless of their stage, lack in-house capacity for core functions required for effective operation. Over half of the deep-dive sample cited financial constraints and restrictions as the main reason for capacity gaps.

Building management teams is expensive and time-consuming, feasible mainly for mature operational conservancies. Identified roles for prioritization include accountants, human resources managers, conservation management experts, and professionals in monitoring and evaluation. The availability of training is highly variable and mainly funded by donors, KWCA, or LAs for early-stage conservancies. Even when expanding, conservancies may struggle to find experienced personnel, necessitating costly training efforts.

Private Sector Prospect Development

Investor engagement plays a crucial role in conservancy establishment as it is crucial for attracting compatible tourism partners to conservancies.

Professional management is needed in this department, as relationships with investors require professional management and nurturing over time. Many conservancies lack the capacity to manage these relationships effectively.

Having a tourism expert on the board significantly enhances expertise and the ability to engage with investors and manage tourism partnerships. Conservancies without a tourism expert on their board often struggle to effectively engage with and attract suitable tourism partners.

Suyian and & Beyond - Technical Assistance and Partners

This case study exemplifies the expertise and technical assistance required to obtain a lucrative tourism partnership and serves to illustrate the disparities in the resources available to conservancies across the national landscape. To navigate the transition from ranch to conservancy, the property leveraged technical support and partnerships with various key organizations. The Laikipia Conservancies Association (LCA) provided invaluable assistance in the process of transitioning to a conservancy model and facilitated the conservancy's joining of the KWCA in 2019.In 2022, through the generosity of the Powys family and a transformational gift by American philanthropist Louis Bacon, the conservation NGO, Space for Giants were able to support the transition of ownership of Suyian Ranch to the Suyian Conservancy Trust, a Kenyan not-for-profit. Stefano Cheli, a renowned tourism advisor and a board member, played a pivotal role in securing the transformative tourism lease with & Beyond, leveraging his extensive industry experience and connections.

2.3.3.1. Proposed Support Strategies

Early operational conservancies require support to develop business plans and private sector prospects, improve management structures and capacity through transparent and accountable financial management, and improve planning and implementation of benefits sharing plans, land use plans, grazing, wildlife management, and human-wildlife conflict. Furthermore, there should be an emphasis on developing functioning monitoring and evaluation systems to review performance and impact, as well as ongoing CapEx to OpEx with longer term financial support as the conservancy transitions to sustainable finance.

Growth Stage	Strategy	Description	Priority	Finance Mechanism	Technical Assistance Mechanism	Policy Need
Early Operational	Economics/ Revenue	Private sector prospects development	High	Private Sector Starter Grants Investment Ready Grants Concessional debt		Enabling tax environment
	Improving management	Improved management structure and capacity Transparent and accountable financial management Planning and implementation of: benifits sharing plans, land use plans, grazing, wildlife management, HWC, etc. Functioning monitoring and evaluation systems to review performance and impact Business planand private sector prospect development Ongoing CapEx to OPEX with longer term fincial support as the consevancy transitions to sustainable finance	Mild	Technical Assistance Grants via landscape associations Development & Leadership Grants Small Grants Facility Private Sector Starter Grants Investment Ready Grants	TA for performance monitoring and evaluation TA on planning and implementing grazing plans, wildlife management , HWC plans, e.g. Government Agencies, NGOs county government and specialised institutes	

Table 10. Evidence-informed needs outlined for early operational conservancies.

2.3.4. Operational and Sustainable

GROWTH STAGE: MATURE OPERATIONAL				
A conservancy governed by a legally established entity, governed by an active board and with management fully established, and programs implemented through a conservancy management plan and professional management team that is mostly self-funded through a diverse set of revenue streams.				
Governance Characteristics	**Management Characteristics**	**Financial Sustainability**	**Communication and Branding**	**Performance Monitoring and Evaluation**
Fully operational board with regular meetings. Comprehensive management teams and clear accountability mechanisms.	Full management structures. Comprehensive work plans and budgets.	Mostly self-funded through diverse revenue sources.	Defined communication policy or marketing plan. Brand identity established.	Robust monitoring and evaluation systems.

Table 11. Growth Stage: Mature Operational

What does a 'Mature Operational' Conservancy look like?

Ol Pejeta Conservancy (OPC) is a private 'operationally mature' conservancy located in Central Kenya. It covers 90,000 acres and was established in 1989 as a conservation area and officially became a conservancy in 2004 when Fauna and Flora International (FFI) purchased OPC with the financial backing of the Arcus Foundation, a private international philanthropic organisation founded by Jon Stryker. Lewa **Conservancy was relied on for technical assistance** and helped expand OPC from a small piece of land with rhinos to a much larger conservancy. Both rhinos and a Chimpanzee Sanctuary were inherited from the previous owners. The protection of which remained a priority. **Substantial capital investment was required in the initial stages** and this was made available through Arcus and FFI. There was already some pre-existing infrastructure in place at time of purchase. **The aim was for OPC to be a self-sustaining enterprise.** Donor funding was not initially seen as a viable revenue generator and the goal was to grow the businesses first through complimentary revenue streams and to become self-sustaining and this was achieved by 2015. However, rhinos and chimpanzees need substantial funding and so **a dedicated fundraising unit was created** - Ol Pejeta UK Ltd - **costing USD 800,000 per annum to run but generates 3M, USD each year.** OPC has **four revenue streams**, which complement each other although there is a significance reliance on tourism. There are multiple integrated land uses, such as ranching, ecotourism and agriculture (wheat). This requires extensive monitoring to ensure the different land uses don't conflict.

Figure 10. Below serves to illustrate why OPC is categorised as a mature conservancy in relation to its governance and management structures and ability to sustain multiple revenue streams.

Governance

Legal entity
- Ol Pejeta Conservancy Limited (by Guarantee) is a Trust
- Ol Pejeta Ranching Limited (commercial arm) owned by Ol Pejeta Conservancy Limited
- Ol Pejeta UK Ltd (fundraising arm) is registered as a charity.

Board
- In place since 2004
- Table for 20 years
- Consists of high profile organisations such as Lewa, FFI, Arcus and other high profile individuals.
- Meet quarterly

Biodiversity assessment
Completed in 2004/2005.

Fencing and demarcation
Completed.

Benefit Sharing
SAPA Surveys for community development projects.
Elected community leaders act as liaisons.

Management

Management Capacity
- C Suite
- Heads of Departments

Staff Capacity
- 437 staff members
- 189 Rangers

Strategic Plans
- Formal Grazing Plan
- Management plan
- Spatial plans to meet the various land use needs since 2006
- Species management plan

Monitoring
- Research and Ecological Monitoring Unit since 2005 - Annual budget USD 70-80M. Team of 6 dedicated staff
- Partnerships with various global institutions.

Key Infrastructure
- 1 airstrip in Kamok
- Road network – 400KM
- 5 Administrative centres

Community Development
Supporting reforestation, agriculture, livestock, water, education, health, energy and enterprise.

Economics

Revenue Streams
- Ranching
- Tourism
- Agriculture (wheat farming)
- Fundraising

Tourism
- The main revenue stream generating 80% of OPC's annual income.
- 9 tourism facilities - ranging in size and price range.

CapEx
USD 200,000-300,000 a year on average.

OpEx
- Costs USD 6M per year for OPC to run.
- 60-66% of costs are linked to human resource.
- Focus on rural employment - education levels are low and significant training is required.

Figure 10. Outline of OPC Structure.

2.3.4.1. Proposed Support Strategies

Mature operational conservancies will benefit from support to diversify revenue streams in tourism, carbon, and livestock, as well as improving marketing and communication strategies, putting work plans and budgets in place, and spearheading community development programs (especially in private conservancies).

Growth Stage	Strategy	Description	Priority	Finance Mechanism	Technical Assistance Mechanism	Policy Need
Mature Operational	Economics/ Revenue	Mostly self funded with plans for, or existing, diversified revenue • Tourism • Carbon • Livestock	Mid	Concessional debt		Enabling tax environment
	Improving Management	Ongoing CAPEX Marketing and communication Strategy Work plans and budgets in place Community development programmes (especially for private)	Mid	Technical Assistance: RA, KWCA Development & Leadership Grants Concessional Debt (Conservancy Level and Private) Private Equity/ Venture Capital		

Table 12. Evidence-informed needs outlined for mature operational conservancies.

Key Actor 2: Private Sector

The private sector is a key actor to bolstering site-level financing options for conservancies, particularly by supporting the development of a range of revenue streams for conservancies. They play a key role in leveraging novel and scalable finance options into a conservancy's remit via pathways such as the carbon, tourism, and livestock markets.

We identified preliminary key site-level leverage points needed to scale site-level finance across and between the different sectors and work towards a collective understanding of policy and financial instruments that could be put in place.

Nine potential site-level revenue streams were examined, including:

- International Tourism
- Domestic Tourism
- Adventure Tourism
- Educational Tourism
- Livestock (beef production)
- Carbon Credits (REDD+ and Sequestration)
- Biodiversity Credits
- Consumptive Use
- Philanthropy

Of these potential revenue streams, the international, domestic, and adventure tourism industries, along with the carbon and livestock markets yield the greatest potential streams of revenue for conservancies according to evaluations, which were based on a bespoke framework and review criteria taking into account seven relevant factors for consideration (Table 13).

#	Factor	Description and Interpretation
1	Complexity	The extent to which the practical realisation of the mechanism will require challenging process and endeavour
2	Capacity	The extent to which adequate capacity exists or can be procured to realise this revenue generating mechanism and manage any complexity.; What capacity exists within conservancies or is needed within a conservancy in order to deliver this? Does capacity exist elsewhere to support implementation of this?
3	Yield	The extent to which the revenue generating mechanism has potential to realise annuity streams at sufficient scale to address the Identified Financing Gap whilst also representing a reasonable return on underlying cost of investment.
4	Sustainability	The Extent to which the yield can be generated on a repeated annual basis into the future
5	Cost of Investment	The Extent to which the yield from the revenue generating mechanism can be realised within meaningful cost of investment bounds
6	Potential to scale	What potential exists to scale this mechanism within and between conservancies? What conditions are needed to enable scaling?
7a	Barriers to scale - policy	What policy barriers limit growth in this area, either due to cost feasibility
7b	Barriers to scale - Market Conditions	How does the current market limit scale> Does demand need stimulating? What is supply like? Are there other limiting market factors?

Table 13. Framework and review criteria for evaluating site-level revenue streams in conservancies.

Carbon, domestic and international tourism, and livestock currently form the most viable revenue streams available to conservancies. Although each revenue stream may be examined independently, they harbor many interdependencies for conservancies.

It is expected that tourism offers the greatest potential for return and scalability. However, the viability and success of tourism does not exist in isolation. The COVID-19 pandemic demonstrated the fragility of the tourism sector - in Kenya tourism dropped from contributing 7.9 Billion USD in 2019 to GDP to just 4 Billion USD in 2020[8]. As such, reliance on tourism as a sole financing mechanism for conservation is fragile and it is deemed beneficial to adopt a systems-based approach amongst conservancies, as to view these different financing options as interrelated and mutually beneficial revenue streams.

8. https://www.statista.com/statistics/1219642/contribution-of-travel-and-tourism-to-gdp-in-kenya/

2.4. Barriers to Site-Level Financing Options

A major barrier for expanding revenue streams concerns their scalability and capacity to yield sufficient revenue (e.g. educational tourism and consumptive use will never have as large a potential market as international tourism). Likewise, the sustainability of the revenue stream is an important consideration; philanthropy may generate significant revenue, but requires large investments and is often unreliable beyond a 3-5 year time frame.

Alongside yield and revenue, capacity for implementation is a significant factor to consider. In the case of livestock production, there exists examples of excellent practice, however a general trend displays more failures due to a lack of management capacity and implementation oversight. Furthermore, the question remains whether a skilled workforce exists to deliver in certain sectors (i.e. adventure tourism) and how the need for training and development may be addressed as part of any financing and scaling packages.

We also recognised the importance of enabling a conducive policy environment. For instance, a nascent carbon market and policies are under development in Kenya that will have an impact on already operational carbon projects. Conversely, the biodiversity credit market is nascent globally and is likely to require iteration and development before it could be considered a significant and reliable revenue stream.

Move to Maturity: A Checklist for Potential Private Sector Support

- Conservancies are in a safe and secure area.
- Investors feel there is a route to profitability.
- Accessibility by road or by plane.
- Adequate infrastructure.
- Management capacity to transparently manage finances.
- Areal management capacity is sufficient to prevent habitat loss and degradation.
- Land tenure in place (i.e. title deeds) to allow deals to be signed.
- Long-term land titles and leases.Local landowners/governing body is able to negotiate a satisfactory deal in terms of contract.
- Board/governance model of conservancy has a good engagement base to avoid infighting.
- Thriving wildlife populations and presence of key species to attract visitors.
- An established brand/unique selling points (e.g. wildlife, scenery, cultural value).
- Appropriate legal entities in place (i.e. not a CBO).

Revenue-generating options increase in both size and diversity as a conservancy improves its governance, management capacity, security of land-tenure and quality of wildlife products.

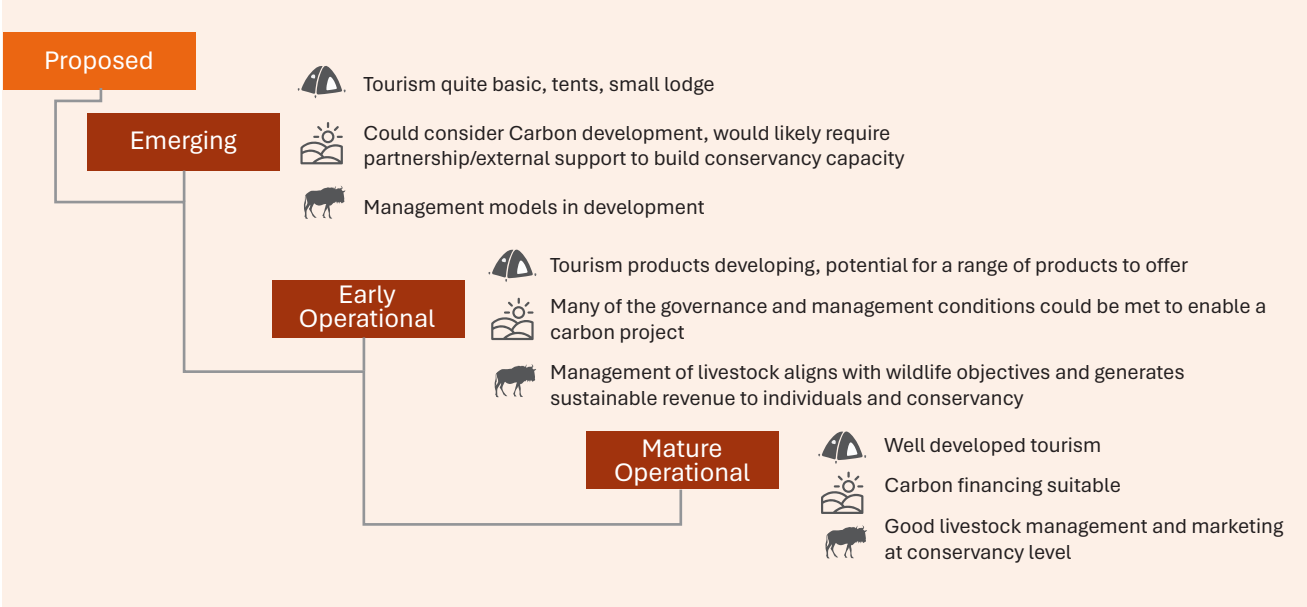

Figure 11. Archetype of revenue-generating activities in conservancies through different growth stages.

2.5. Carbon Markets

Voluntary carbon markets contribute to the financial resilience of conservancies by offering an opportunity to provide a sustainable long-term revenue stream, enabling conservancies to achieve their goals of conserving biodiversity whilst extending tangible benefits to local landowners.

The voluntary carbon offset market, which was worth about USD 2 billion in 2021, is expected to grow to USD 10-40 billion in value by 2030. Carbon projects in Kenya's conservancies could provide a source of carbon credits for the market. Thus far, there are 3 projects developed (see map below) in Kenya's conservancies[9].

There exists potential for projects that focus on carbon sequestration (e.g. grassland restoration) and avoided loss (e.g. REDD+) in accordance with the significant global demand for carbon credits. Furthermore, regulatory requirements are evolving rapidly and continuous monitoring remains vital.

9 See KWCA Guide to Carbon Projects for Conservancies

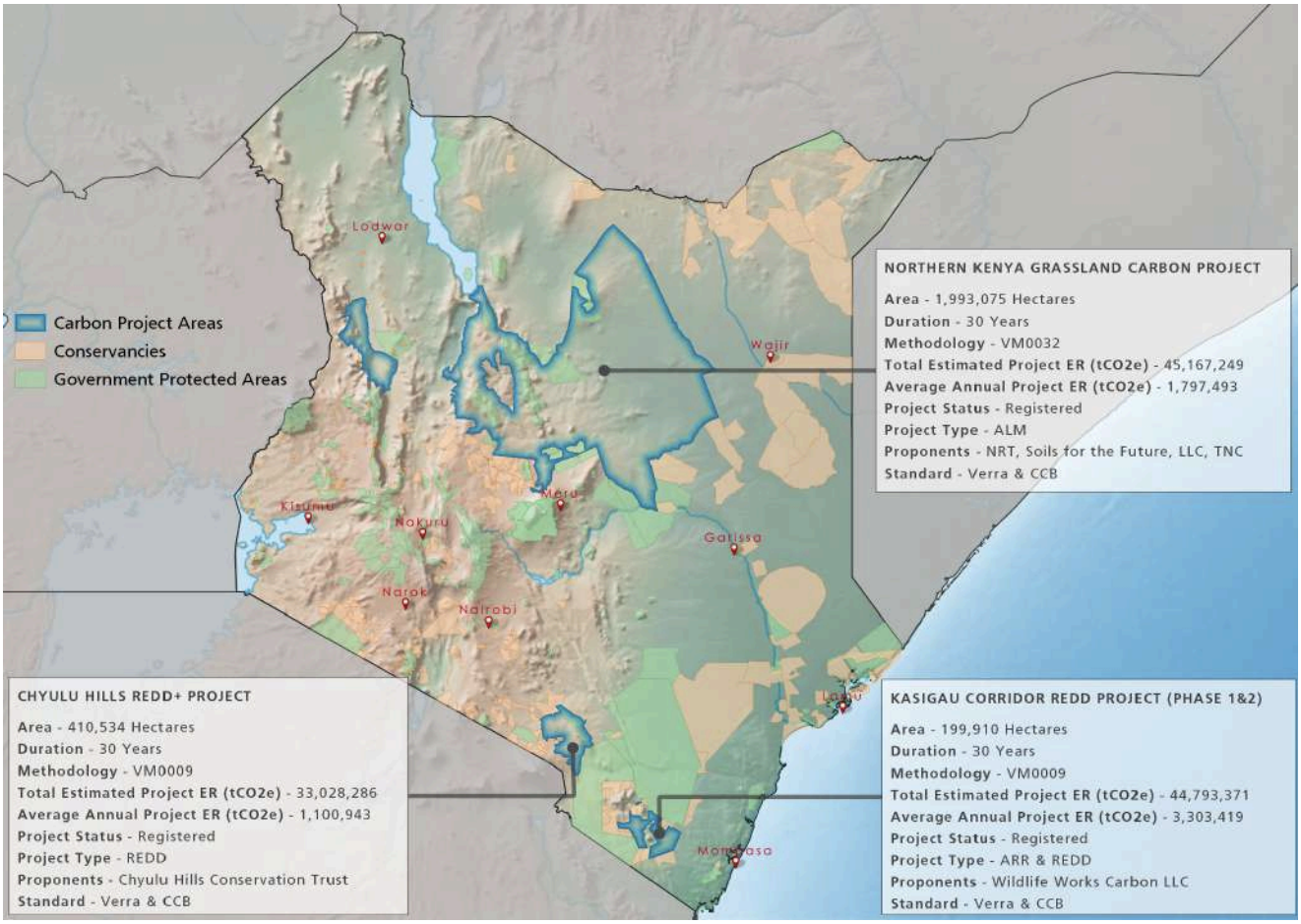

Figure 12. Established carbon projects in conservancies in Kenya.

In the context of Kenya's conservancies, there are two main carbon project types:

1. **Reducing Emissions from Deforestation and Forest Degradation in Developing Countries (REDD+).** This type of project aims to combat climate change by reducing greenhouse gas emissions through forest conservation, sustainable management, and enhancement of forest carbon. This can generate substantial annual revenues, between USD 30 to 120 per hectare per year, dependent on threat and existing carbon stocks. Operations & management costs can vary between USD 20 to 60 per hectare per year.
2. **Grassland Sequestration Projects.** This type of project enhances the carbon storage capacity of grasslands and soils through improved grazing management. The Northern Rangelands Trust has pioneered one of the first grassland sequestration methods. A grassland sequestration project has lower margins but at scale, it can generate significant income to conservancies already improving their livestock management, with annual revenue between USD 2.5 to 15 per hectare per year. Operations & management costs can vary considerably from USD 5 to 15 per hectare per year.

The profitability and returns of these projects to conservancies and land-owners can vary widely and is dictated by the price of carbon credits, as well as the benefit-sharing structures established. These generally vary from project to project, but emerging legislation will likely enforce a percentage benefit sharing with communities. In addition, the costs of establishing a carbon project can be prohibitive, with costs as high as 1 million USD per project.

#	Factor	Scoring	Description
1	Complexity	Poor	Understanding and navigating the complexities of carbon credit markets and verification processes can be challenging for conservancies, leading to potential exploitation or underrepresentation in the market.
2	Capacity	Poor	Project management architecture: It is rare for a single conservancy or organisation to have the capacity to meet all the various responsibilities and requirements of maintaining a verified carbon project. This is due to the technical nature of developing, implementing and monitoring a carbon project. It is critical to understand which partners and stakeholders will need to be engaged to support with which expertise.
3	Yield	Medium	REDD+ Emission reduction: 3-12 tCO2e ha-1 yr-1 Annual Revenue: 30 - 120 USD ha-1 yr-1 Grassland Sequestration Emission sequestered: 0.25 - 1.5 t CO2e ha-1 yr-1 Annual Revenue: 2.5 - 15 USD ha-1 yr-1
4	Sustainability	Medium	Dependence on external markets: Carbon prices are subject to global market fluctuations. Over-reliance on these markets can make conservancies financially vulnerable. Long-term commitment and permanence concerns: Carbon projects require long-term commitment, of at least 30 years. Changes in social needs or priorities or external pressures over time may affect the sustainability of the project.
5	Cost of Investment	Poor	Projects are costly in terms of time and expertise. It is important to secure flexible finance from financial institutions to pay for the high start-up costs of operationalizing REDD+ projects (including verification and validation). Connections with an NGO third party can be helpful with this.
6	Potential to scale	Medium	Potential to scale across all rangeland conservancies for grassland projects. There is a mixed ability for REDD+ projects due to limitations in forest cover, and jurisdictional REDD+. Many conservancies already want to scale.
7a	Barriers to scale - Policy	Medium	Land tenure/agreements need to be in place in order to warrant investment. Land tenure needs to be secure for the duration of the project and even after that due to additionality. In some areas this will require significant time investment.
7b	Barriers to scale- Market conditions		Capacity building. Ensure the regulatory environment is actually understood at site level. What do regulatory developments actually mean for a conservancy commencing/operating a carbon project e.g. risk of non-compliance with standards: Failure to comply with international standards for carbon projects can lead to disqualification from carbon markets, loss of investment, and reputational damage.

Table 14. Evaluation Criteria - Carbon Markets

Minimum Criteria for Carbon Project Development

Enabling Criteria at the National Level

There are a multitude of issues with the current enabling criteria for carbon project development in Kenya, which has created an uncertain business environment - acting as a deterrent to potential investment. Regulatory uncertainty, bureaucratic inefficiencies, uncertainties around incentives and market access, along with monitoring and verification challenges and institutional weaknesses all pose significant challenges. Steps need to be taken to improve the regulatory environment, enhance institutional capacity, and provide better financial and market support. Regulatory requirements are however evolving and so continuous monitoring remains vital. Regulations are currently structured by The Climate Change (Amendment Bill 2023), which should help bolster Kenya's ability to mobilise resources and strengthen its capacity for climate resilience initiatives. The Carbon Credits Trading and Benefit Sharing Bill (2023) could potentially enable better infrastructure for a domestic carbon trading market.

Enabling Criteria at the Site-Level

Effective management and governance of carbon projects requires skills and resources. Poor governance can lead to project failure. Conservancies likely need sufficiently trained management staff and technical assistance to enable long-term commitment with regards to land tenure, which needs to be secure for at least 30 years (e.g the duration of the project, even after due additionality).

2.6. International and Domestic Tourism

Approximately 70% of tourism in Kenya is wildlife-based, forming a significant opportunity for conservancies across the country to attract domestic and international visitors.

In 2022 Kenya had 1,483,752 visitors, which is a 70.45% increase from 2021. International tourist arrivals grew 32% in the half-year to June 2023[10].

- In 2022, the tourist market inbound receipts were estimated to be up to KES 268.09 billion (USD 2.1 billion).
- Approximately **70%** of this is attributed to **wildlife-based tourism.**
- The Kenya Tourism Board plans to **increase tourist arrivals to 5 million by 2030**, by waiving visa fees, increasing ease of investment, and improving product marketing.
- The **current ecotourism movement,** consisting of over 300 lodges and 14,000 beds, is **likely to continue to grow**, as long as conservancies can continue to grow, and conserve wildlife populations. [11]

Industry growth is mediated by the fact that **Kenya is able to offer tourism year round** and the country is considered safe for travel as it is currently not on any advisory lists (affects travel/health insurance).

Despite a drop in tourism during COVID-19, recovery has been strong and scaling domestic tourism is a focus in the 2025 tourism strategy. However, there remain opportunities for growth within the international photographic tourism sector as pertains to conservancies (Table 15).

Adventure tourism offers an opportunity for diversification within the international and domestic tourism sectors and provides an opportunity to link adventure tourism to conservation. For instance, conservancies may well be suited to exploiting the increased interest in hiking and walking safaris.

Furthermore, **integrating livestock into part of the tourism experience adds an educational aspect**, similar to the prospects of conservancies marketing and selling immersive local cultural experiences to tourists. Locally, there also seems to be a demand for people wanting to live in/next to wildlife areas (Naretoi, Ol Pejeta, Oloisukut, Borana, Sangare).

10 https://www.tourism.go.ke/wp-content/uploads/2023/02/ANNUAL-TOURISM-SECTO R-PERFORMANCE-REPORT-2022-2.pdf
11 Data: TNC PFP Tourism Database

#	Factor	Scoring	Rationale
1	Complexity	Medium	Requires planning, management and infrastructure to do well Not complex but requires certain conditions and enabling criteria in order to work.
2	Capacity	Good	Capacity for tourism in Kenya is quite high, compared to neighbouring countries like Tanzania and Uganda. Good models exist already and there is a workforce that are trained to deliver international tourism to a good standard.
3	Yield	Good	Potential to generate a significant yield when done well- good examples of this already.
4	Sustainability	Good	Has the ability to generate long term revenue for an area and also grow over time. Tourism was tested by COVID and is at risk of any political instability or any significant global events changing travel and/or spending behaviours.
5	Cost of Investment	Medium	Land tenure and agreements need to be in place Upfront capital costs and time to ensure that legal and infrastructure are there. In some areas this will be more significant than others.
6	Potential to scale	Good	There are already models of best practice/success that could be scaled to other areas. Demand exists (and there is potential for growth). Scale could be enhanced by other incentives for the tourism industry e.g. Visa removal for some countries, Airport accessibility.
7a	Barriers to scale - Policy	Medium	Land tenure/agreements need to be in place in order to warrant investment. In some areas this will require significant time investment.
7b	Barriers to scale- Market conditions	Good	Lack of tax incentives for investors.

Table 15. Evaluation Criteria for International and Domestic Tourism

Ecotourism consists of several market segments. High-end, mid/low-end, and the domestic market are the largest segments in the ecotourism sector in Kenya.

High-end: lodges charging international clients between USD 500 to USD 2000 per night form the core of financial stability for several conservancies in the Maasai Mara and Laikpia. Tourism investments create conservation impact via conservation fees and/or bed-night paid to conservancy management to implement projects, pay for operations, and pay landowners. These models take several forms.

Greater amounts paid through conservation fees are the current preferred model of fee payment in some conservancies and for some tourism partners, including in the Maasai Mara (e.g. House in the Wild), and in many private conservancies in Laikipia. These conservation fees are used to pay for conservancy operations and direct payment to landowners through lease fees (in group conservancies) or to support community development projects. In this example, a 20-bed, high-end lodge could return USD 230,000 in conservation fees per year at 40% occupancy and USD 100 international adult conservation fee. The same lodge, at 40% occupancy, charging an average of USD 1000 per night, could have an annual EBITDA of USD 1,000,000.

Midrange: A mid to low-range lodge can operate on a similar model to the high-end lodges but generally requires more bed capacity to achieve profitability. This type of lodge needs to be situated in areas where the ecological impact of repeated vehicles and use of space can be easily reduced. A 100-bed, low-end lodge, could regenerate turn USD 300,000 in conservation fees per year at 40% occupancy and USD 40 conservation fee.

Domestic: The number of domestic tourists' bed nights increased from 2,948,000 in 2014 to 4,559,000 in 2018[12]. Furthermore, domestic tourists' bed-night occupancy accounted for more than 50% of the bed occupancy from 2015-2018 and increased in 2021 to 3.8 million tourists[13]. Considerable growth in Kenya lies in the middle-class population, i.e., people earning more than KES 50,000 p.m, which amounted to 1,020,681 people in 2018, equivalent to 36.9% of the total employed population[14].

There is considerable potential for growth in areas closer to Nairobi and major cities. The domestic market, while small, can provide significant revenue if well-managed. For instance, in Kimana Sanctuary (before investment), Big Life generated approximately USD 150,000 per year from several campsites and a small self-catering lodge which specifically targeted the domestic market.

12 KNBS, 2019
13 KNBS, 2019
14 KNBS, 2019

2.6.1. Restructuring Agreements and Creating an Enabling Environment is Vital to Creating Conservancy Revenue

Across Kenya, it is estimated that between USD 50,000,000 and USD 150,000,000 more revenue could be generated for conservancies[15], and therefore some of this could be passed onto communities, if the conservation fees and benefit-sharing agreements across the 300+ lodges in Kenya's wildlife tourism sector were restructured to follow some of the better revenue sharing options shared above.[16]

It is clear from a 30x30 perspective that **significant investment in the tourism sector is needed**, to do so requires a number of enabling conditions to be met by funders and the county and national government (see Table 16).

Solution	Barrier
Policy: Providing tax incentives (e.g. green policy) Technical: Engage Kenya Tourism Board (KTB) and Kenya Investment Authority	Lack of tax incentives
	Perceived or real difficulty in getting international investment with immigration and/or others
	Insufficient tourism numbers
	Advertising and marketing domestically and regionally
Technical and financial support: for product diversification (i.e not just high end) Technical support to improve governance and management of conservancies	Lack of transparency/ accountability within the conservancies e.g. Conflict between tour operators
	Lack of business development skills
	Lack of non-corrolated and multi-level properties (i.e not enough domestic tourism operations etc)
	Weak governance structures (makes investment opportunities high risk)
Financial support (e.g. through small grants)	Lack on access to finance at the community level
Developing and implementing spatial and land use plans	Encroachment and changing land use patterns
Financial support (e.g. through small grants or concessional debt)	Lack of infrastructure

Table 16. Improving international photographic tourism viability in Kenya.

15 Sustain EA and Conservation Capital
16 Sustain EA and Conservation Capital

2.7. Livestock Management for Beef Production

Please see FM6 for an outcome based payment approach to livestock management that can complement this revenue-stream, and act as a base for improved rangeland conditions.

Kenya has a vibrant livestock sector that contributes approximately 12% to the national Gross Domestic Product (GDP) and 42% to agricultural GDP.[17] There are about 18.8 million cattle in Kenya, of which 76% are beef cattle. Beef is largely produced in arid and semi-arid areas (ASALs), where about 36% of the Kenyan population live. Beef production through sustainable livestock management practices forms a conservation-compatible land use. However, improvements in the livestock sector are needed in the following areas:

- Quality
- Market access
- Herd and land management
- Information on husbandry
- Value chain improvements
- Wildlife (predation)

At current, there exists a growing opportunity for sustainable livestock rearing in Kenya, which forms a compatible land-use practice within conservancies and OECMs. There is a growing demand for red meat country-wide, which is not met by current supply volumes.

Livestock rearing, when combined with other revenue generating mechanisms offer conservancies the ability to 'stack' income streams, offering an alternative to conversion to non conservation-compatible land uses.

Current poor livestock management practices lead to the degradation of land, which in turn negatively impacts livestock productivity, ecosystem resilience, wildlife populations, and ultimately also affects tourism products. As such, improved livestock management enables habitats to recover, supporting both wildlife and domestic herds, and enhancing carbon storage of the soil.

In a limited number of conservancies, largely private and group conservancies, well managed livestock herds to be sold into the beef market present a potentially profitable revenue stream that is compatible with conservation goals and land management. Revenue from livestock sales could channel back to local communities and/or land owners. As such, there is considerable potential for private and group conservancies to create beef production models that generate conservancy-level finance.

17 ILRI Kenya Livestock Master Plan process

Ol Pejeta Conservancy (OPC) - A Successful Livestock Model

OPC operates one of the **best-known conservancy livestock models.** With a breeding herd of 6,000 animals across 60,000 acres and an average annual rainfall of around 1,000mm, Ol Pejeta employs **a holistic grazing management model** and **generates between USD 500,000 and USD 750,000 in net profit annually.** Ol Pejeta demonstrates that returns increase significantly with economies of scale, particularly larger herd sizes and mature breeding herds.

Its very successful beef programme, offering free range beef is highly sought-after by Nairobi's top butchers and restaurants. **An on-site abattoir reduces transport costs** along with their carbon footprint. Strategic feeding of prime steers during drought and dry spells reduces the age of animal at slaughter. **Production of grass hay is paramount** to achieving this objective, and increasing the hay area from 180 to 900 acres is part of the OPC's current five-year plan.

The beef enterprise plays a significant role in OPC conservation efforts, with the additional income supplementing operating costs.

In other regions, it is estimated that well-managed commercial breeding herds for beef integrated with wildlife can generate between USD 12 and USD 30 per hectare per year, varying with carrying capacity, range condition, finishing methods, ownership models, and management knowledge.

Minimum Criteria for Livestock Investment

Enabling Criteria at the National Level

- A national demand for good quality Kenya reared beef.
- Improved security in the north of Kenya to scale sustainable livestock management
- Incentives to try to control herd sizes by pastoralists in an attempt to reduce overgrazing.

Enabling Criteria at the Site-Level

- Implementation of good herd management practices and holistic grazing plans.
- Technical assistance to provide tailored advice on grazing and management plans
- Engage landowners and livestock owners to commit to changes in livestock management practices.
- Access to veterinary services, abattoirs, and markets.

Key Actor 3: Landscape Associations

Landscape Associations (LA) are crucial to Kenya's conservation landscape, serving as regional hubs that bring together conservancies to collectively address challenges, share knowledge, and work towards common goals.

Deep dive interviews with conservancy managers suggest that there is significant reliance on LAs, from conservancies, particularly in the foundational stages of creating systems of governance. Conservancies rely upon their supporter consensus-building, governance structuring, and securing core management support and infrastructure. It is important to note that the provision of support supplied is both technical assistance and funding.

Landscape Association (LA)	Abbreviation	Website
Amboseli Ecosystem Trust	AET	https://amboseliecosystem. org/
Athi Kapiti Wildlife Association	AKWCA	https://athikapiti.org/
Baringo County Conservancies Association	BCCA	https://baringoconservanci es.co.ke/
Laikipia Conservancies Association	LCA	https://www.laikipiaconser vancies.org/
Marsabit Wildlife Conservancies Association	MAWICA	https://mawica.or.ke/
Maasai Mara Wildlife Conservancies Association	MMWCA	https://maraconservancies. org/
North Eastern Conservancies Association	NECA	https://neca.or.ke/
Northern Rangelands Trust	NRT	https://www.nrt-kenya.org/
Pwani Ecosystem Conservancies Foundation	PECFO	www.pwaniconservancies.co.ke
Ramat Wildlife Society	Ramat	https://www.ramatwildlife. org
Rift Lakes Conservancies Association	RLCA	
South Rift Association of Landowners	SORALO	http://www.soralo.org/
Taita Taveta Wildlife Conservancies Association	TTWCA	https://www.ttwcakenya.co m/
Western Wildlife Conservancies Association	WWCA	https://wwcakenya.org/

Table 17. List of landscape associations.

2.8. The Role of Landscape Associations

Their role is essential in creating a more robust and interconnected conservation network that can contribute effectively to biodiversity conservation, community development, and sustainable natural resource management. Table 18 summarises many of the LA roles.

Fundraising	• Mobilise resources and teams to develop and administer funding programs that less well-resourced conservancies could not achieve. • Particularly important for early-stage conservancies that cannot raise or administer their own funding.
Strengthening Collaboration	• Act as platforms for different conservancies to collaborate on shared challenges and opportunities. • Build a stronger, more interconnected conservation network.
Problem-Solving and Solution Development	• Provide a forum and support team for conservancies to collectively address challenges • E.g. wildlife management, sustainable development, or community engagement.
Ecosystem-Wide Joint Vision and Planning	• Assist in developing a joint vision for scaling up conservancies within their region and developing ecosystem plans. • Driving a more comprehensive and impactful approach to conservation, and jointly fundraise at the regional scale e.g. carbon projects.
Policy Advocacy at the County and National Level	• Engage in advocacy efforts, representing the collective interests of conservancies at a regional level.
Capacity Building	• Organise training programs, workshops, and conferences to enhance the capacity of conservancy managers and stakeholders.
Networking and Knowledge Exchange	• Provide a platform for conservancy managers, stakeholders, and experts to build networks - essential for fostering relationships that can lead to collaborative projects, funding opportunities, and shared learning experiences.
Data Collection and Sharing	• Data collection and management - maintaining databases of conservancies within their region, including information on boundaries, status, and key attributes.

Table 18. Areas of growth for landscape associations in order to adequately support conservancies.

2.9. A Critical Review of Landscape Associations

Support Provision

The provision of funding and technical assistance amongst the 14 Landscape Associations (LAs) is highly variable, attributed to the fact that they all obtain funding of differing levels from a range of sources. Some landscape associations, for example, might be successful in obtaining project based grants, government funding or have strong links with philanthropic donors.

The result is a spread of inequitable funding across the conservancy landscape, which is dependent on the human resource capacity and expertise within the regional associations to bring in funding, aside from that of membership fees.

- An assessment of the LA capacity to operate and fulfil their organisational goals, was conducted in June 2023, with LAs accessed across the following capacities:
  - Strategy and planning
  - People: Leadership; Governance; Values; Partnerships; Staff
  - Finance: Resources: Financial Management; Fundraising; Revenue Generation
  - Action: Planning; Management, Systems, Policies & Procedures; MEL; Communications
- MAWICA and RAMAT are not assessed, but are early stage and lack capacity. SORALO is not assessed but would likely operate between AET and MMWCA.
- This scoring provides a clear needs assessment for funding provision under the 30x30 to ensure core operational costs are supported.
- In addition it was highlighted that new LA might be needed in certain localities, such as the Mara East/Loita area and Turkana County.

LA	NRT	LCA	TTWCA	MMWCA	BCCA	AET	NECA	AKWCA	WWCA	PECFO	RLCA
Organisation assessment Score (%)	98	93	90	90	71	52	40	36	31	17	14

Table 19. LA Organisational Assessment Score

The support provision of landscape associations provided to amongst the conservancies they support also appears inconsistent and inequitable dismissive of equitable resource allocation. This can be attributed to a number of factors:

1. Lack of capacity within the LA teams to provide sufficient support for conservancies. This is likely due to funding restrictions and as such the inability to increase human resource capacity.
2. Lack of transparent and clear prioritisation of resources - unclear why some conservancies will receive more 'favourable' treatment with the regards to the allocation of resources over other conservancies.
3. Lack of transparent/externally monitored needs based assessments amongst the regional associations to guide the allocation of technical and financial resources to the conservancies under their jurisdiction.

Financial support to LA is required. This should (1) ensure core operations and mandates are supported to enable LA to function and become sustainable and once this is achieved (2) support missing functions required to create REDI conservancies in these landscapes. This is elaborated in the Technical Assistance sections of the report.

Key Actor 4: Household

Conservancies can offer multifaceted benefits to communities, both in monetary and non-monetary form. They can enhance the economic, social, environmental, and cultural well-being of local communities, whilst fostering sustainable development and conservation efforts. Many conservancies are found in underserved areas of Kenya, with high poverty rates, and considerable need for local development initiatives.

To sustain conservation activities across Kenya the net economic benefits to community and private landowners generated from conservation-compatible investments will need to exceed the net economic costs experienced, together with the other costs of conservation, including human-wildlife conflict, and disease transmission from wildlife to humans and livestock.

These so-called opportunity costs include the significant costs to land-owners in restraining from participating in non-conservation compatible land use (e.g. agriculture) and instead supporting management and sustainable development costs.

Conservancy-level revenue plays a key role in supporting the sustainable management and conservation efforts of a conservancy as identified in section 4 of this report. Options for revenue generation encompass diverse avenues as previously discussed and can provide monetary benefits at household level in the form of employment opportunities for local community members, which in turn can create local economic multipliers through associated industries and professions.

2.10. Monetary Benefits

Direct Employment Opportunities

Conservancies play an important role in rural employment. With the number of people scaling with the maturity of the conservancies. For example, approximately 40% of conservancies have 100% local recruitment.

The average local recruitment percentage varies per conservancy type:

- Co-managed conservancies attaining 100% local recruitment (albeit with a small sample size)
- Community conservancies 82.5% local recruitment
- Group conservancies 71.2% local recruitment
- Private conservancies 70.7% local recruitment

In total, thousands of people are employed across conservancies in Kenya. Rangers form the core of the employees of any conservancy, and are often recruited from the local community and provided employment and benefits. 3650 rangers are recorded as working in conservancies in Kenya, with an estimated 5547 in total working across the country.[19] This is estimated as a total annual salary payment of KES 845,854,650 or USD 6,407,989 paid annually to communities in some of the most deprived parts of Kenya. Our larger estimated number of rangers would indicate KES 1,285,467,327 or USD 9,738,388 paid annually to employees[20]. This economic impact would likely vastly increase as conservancies develop and mature, and their operational budgets and payroll size increase over time.

In addition, employment of conservancy members in other roles, and through tourism employment is considerable.

19 Data: KWCA Baseline. We used the number of rangers per ha for different conservancy types (community, group, private) and status (proposed, emerging, early operational and mature) to estimate the number of rangers in conservancies where data was not provided.
20 This assumes an annual rangers salary of KES 231,741, calculated as the median value of salaries for 190 employees across five conservancies in the Maasai Mara.

Monetary Benefits Derived From Tourism

Several forms of tourism exist in Kenya, that can generate significant returns for conservancies and local communities, and is a growing market. Conservancies depend on tourism income through conservation fees, bed night fees, lease fees, and charges levied for other services and activities.

Benefits vary by conservancy type:

- **Group Conservancies:** Benefits are paid directly to landowners, typically in the form of lease fees. These payments go to the heads of households who are members of the conservancy. This direct payment model ensures that the financial benefits from conservation activities are received by the individual landowners who contribute their land to the conservancy.
- **Community Conservancies:** Benefits are distributed mainly through communal development projects. This model focuses on collective benefits rather than individual payments. The funds generated from conservation activities are invested in projects that benefit the entire community, such as schools, healthcare facilities, water projects, and infrastructure improvements. This approach helps to build community support for conservation efforts and ensures that the benefits are shared equitably among all community members.
- **Private Conservancies:** The provision of benefits is not always a mandate, but in mature conservancies, there can be significant communal benefits through development projects. While private conservancies are primarily managed by individual or corporate landowners, many engage in community development initiatives as part of their corporate social responsibility or conservation strategy. These initiatives can include providing employment, supporting local schools, healthcare services, and infrastructure development. The level of community benefit provision often depends on the maturity and success of the conservancy.

Lease fees example in the Maasai Mara

Land-owners are paid large lease fees from tourism operators, overcoming the large opportunity costs for agriculture.

Northern Mara (Lemek, Ol Chorro, Enonkishu and Mbokishi conservancies) collectively generate around USD 2,500,000 from tourism, with nearly half of this amount dedicated to paying leases.

These lease payments directly benefit over 600 landowners and support the livelihoods of their families. 90% of these leaseholders report that conservancies have improved their well-being, In addition, leaseholders report improved food security with the rate of skipping meals being never.
75% of Landowners reported increased wildlife tolerance since conservancy establishment.

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Critical to the generation of benefits at the land-owner level, is the mechanisms of benefit sharing employed by the conservancy. Transparency, accountability and good governance are vital in ensuring resources are not lost to elite capture. Most conservancies interviewed in the KWCA baseline survey reported significant benefit sharing with their community members. With conservancies reporting between 10-40% of annual operational funding used for direct payments to land-owners (highest in group conservancies), and 5-30% on community development projects (highest in community conservancies). Around 9-15% of conservancy funding is reportedly used to mitigate Human Wildlife Conflict (HWC).

Despite these figures, there is substantial room for improvement and further transparency along the conservancy value chain is needed, from the private sector to the conservancy and to the household level.

The below diagrams (Figures 13-15) illustrate how conservancy-level revenue, generated through tourism can play a key role in deriving monetary benefits at household level through collected by the conservancy through **conservation fees and distributed by lease fees or development projects.**

21 KWCA White Paper - The costs and benefits of conservation on community and private lands

Small conservation fee contributions occur in a number of places where conservancies have lacked the technical and financial capacity to negotiate better rates, to cover the costs of operations. This is one example, but these fees are common in some of Kenya's best wildlife viewing areas and hinder the conservancy's ability to cover its operations and offset costs to landowners through lease fees or community projects.

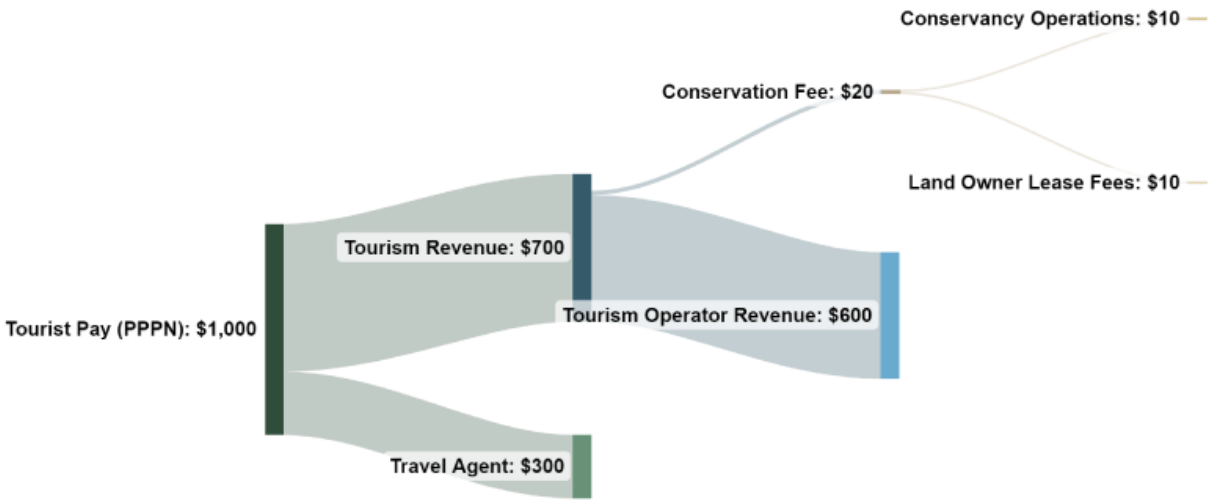

Figure 13. Small conservation fee model.

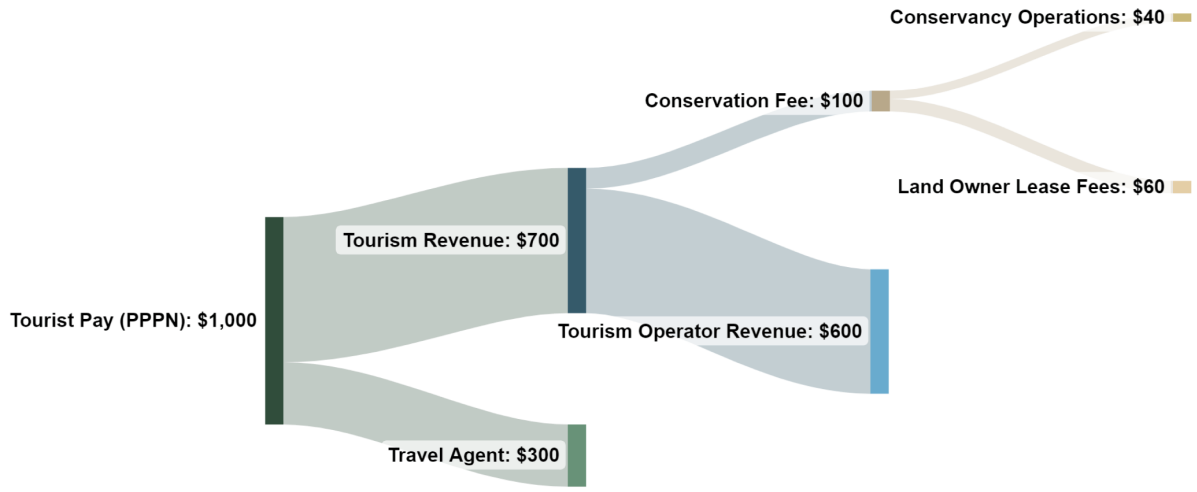

Figure 14. Larger conservation fee models.

The larger conservation fee models are the current model of conservation fee payment in some conservancies and tourism partners, such as in the Maasai Mara, and in many private conservancies in Laikipia. These conservation fees are used to pay for conservancy operations and direct payment to landowners through lease fees (in group conservancies) or to support community development projects. In this example, a 20-bed, high-end lodge could return USD 230,000 in conservation fees per year at 40% occupancy and USD 100 international adult conservation fee.

The "best-practice" model found in some conservancies, is when a lodge guest pays both a reasonable conservation fee and a bed-night fee. This could be implemented in a scenario where the conservancy or community owns the lodge, and a considerable Bed Night fee is also collected in addition to the conservation fees.

Carbon Credit Benefit Sharing Example:[22]

Participating in carbon projects is another way for communities to derive monetary benefits. An example of which is illustrated below.

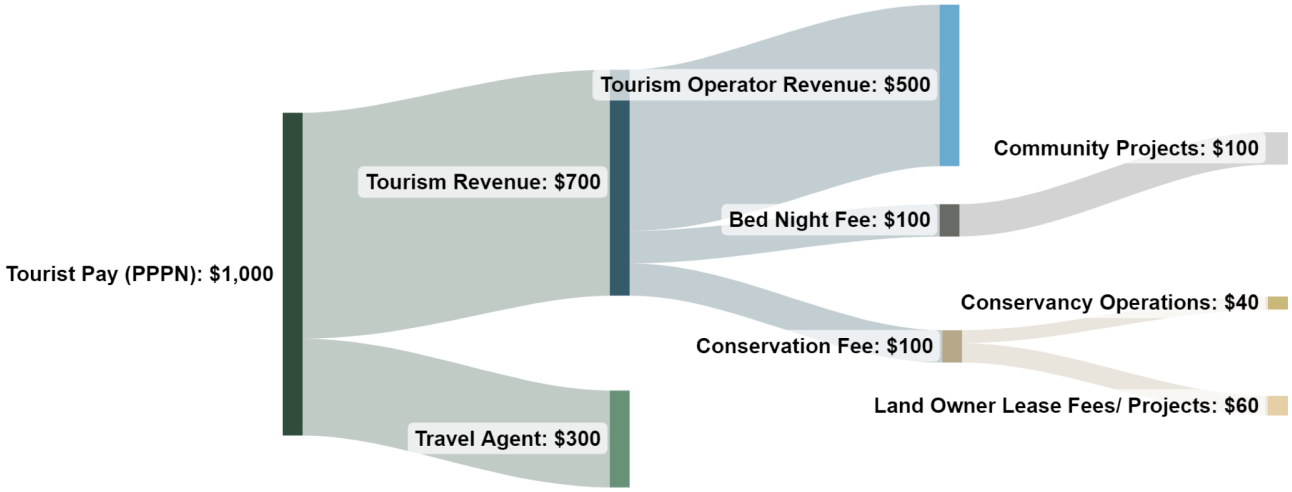

Figure 15. "Best-practice" conservation fee model.

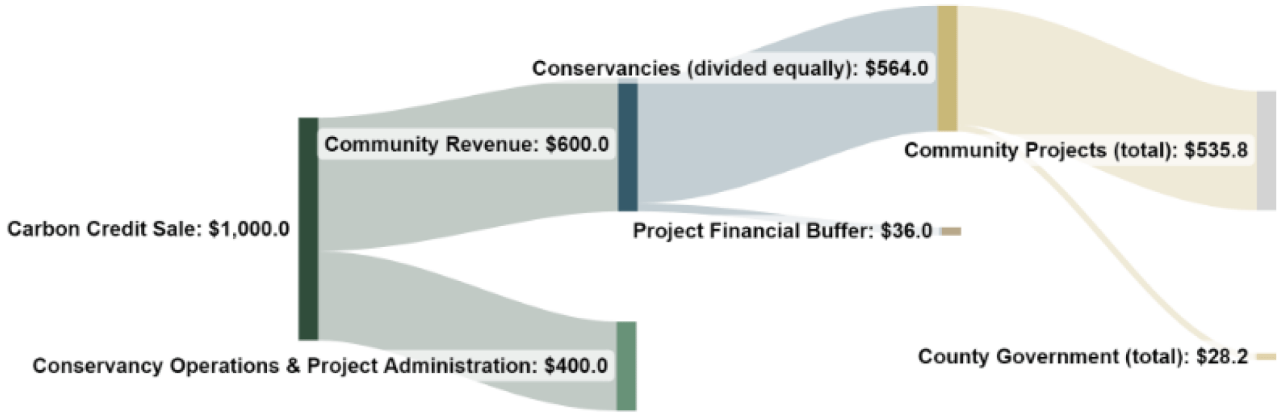

Figure 16. Carbon projects revenue model.

22 KWCA Guide to Carbon Projects for Conservancies

Northern Kenya Rangelands Carbon Project (NKRCP)

- The Northern Kenya Rangelands Carbon Project (NKRCP) focuses on rangeland restoration and community development. The benefit-sharing arrangements between the Northern Rangelands Trust, project developer, and conservancies were agreed upon through extensive meetings at the conservancy, village, zonal, board and leadership levels.
- Each community conservancy participating in the NKRCP contributes 5% of its revenue to county government development mechanisms that support rangeland activities.
- Some of the revenue generated is channelled into community projects such as water piping, borehole repairs, improving the education sector through classroom construction, and drought response.
- For instance, from the 2021 revenue KES 5.5 million was allocated for relief food provision to over 6,000 households in five locations in the Laisamis sub-county. Also, 16 million was channelled toward paying student bursaries in Isiolo, Samburu, Laikipia, and Marsabit counties.

2.11. Non-Monetary Benefits

Non-monetary benefits provided by conservancies can be particularly valuable in regions with high poverty rates and inadequate government services. These benefits, while difficult to quantify, encompass various essential aspects of community and individual well-being:

1. **Health:** Conservancies often facilitate access to healthcare services, which can include clinics, mobile health units, and health education. Improved health outcomes contribute to a more productive and resilient community.
2. **Education:** By supporting schools, providing scholarships, and promoting educational programs, conservancies help increase literacy rates and educational attainment, leading to better opportunities for the community.
3. **Peace, Cohesion, and Security:** Conservancies can foster social cohesion and peace by providing a structured environment where community members work together towards common goals, reducing conflicts over resources and land.
4. **Cultural Values:** Conservancies help preserve and promote cultural heritage by protecting traditional lands, supporting cultural practices, and fostering a sense of identity and pride among community members.
5. **Grazing Management:** Effective grazing management practices promoted by conservancies can lead to sustainable land use, improved livestock health, and increased productivity, benefiting the livelihoods of local pastoralists.

These non-monetary benefits from conservancies can be crucial for the overalldevelopment and sustainability of communities, especially in areas with limited access to essential services and resources.

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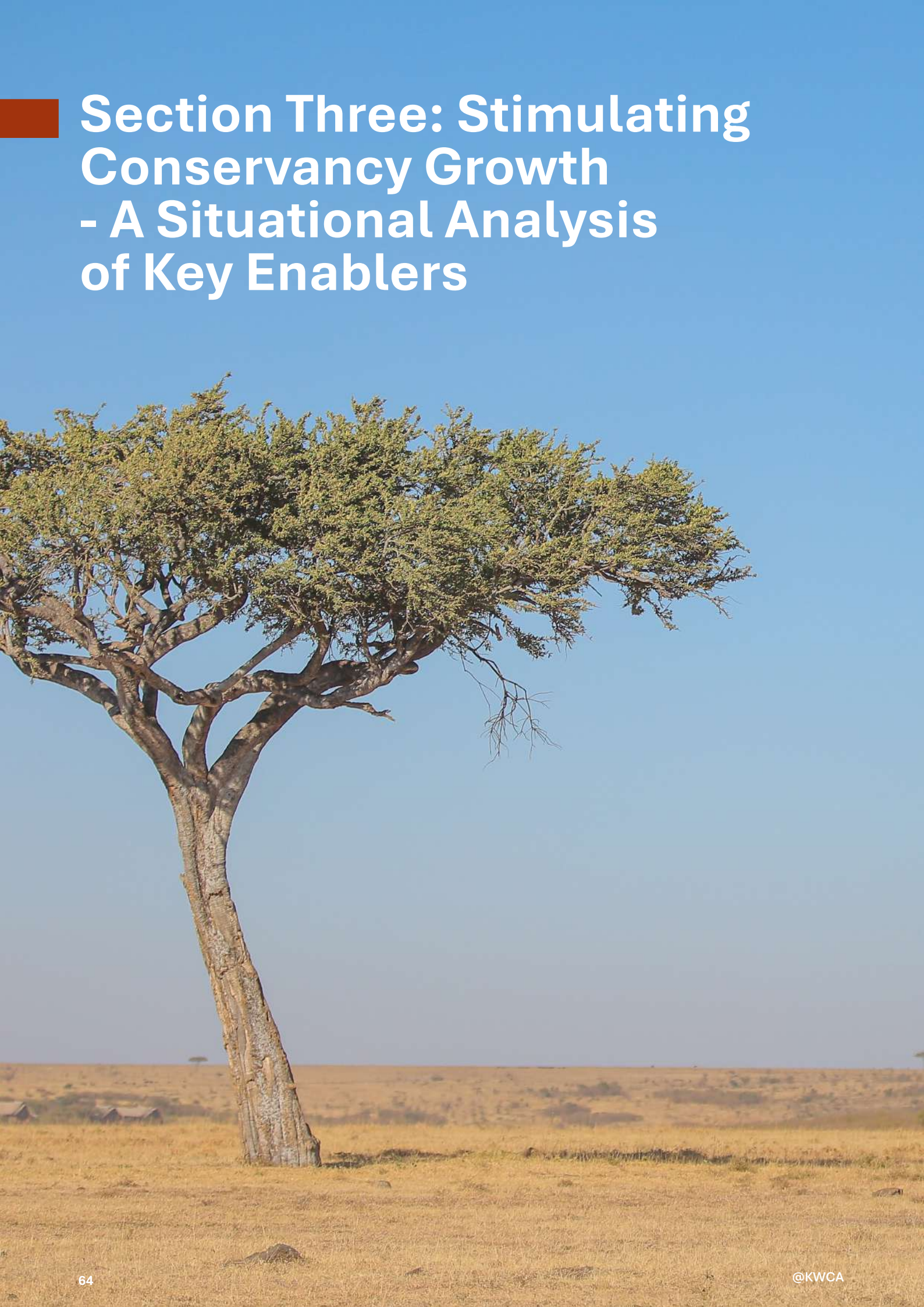
Section Three: Stimulating Conservancy Growth - A Situational Analysis of Key Enablers



Accelerating conservancy expansion in Kenya will rely on the support from key enablers to fill current gaps in the areas of landscape associations, land tenure, spatial planning, and human-wildlife conflict. We aim to address evidence-informed needs to allow for conservancies to make their move to maturity, thereby fostering local involvement in biodiversity conservation as we progress to Kenya's 30X30 commitments.

Evidence-informed needs support conservancies through growth stages by guiding proposed sustainable financing support packages, such as PFP.

Key Enabler 1: Landscape Associations

- **Inadequate Support from Landscape Associations:** Currently provide inconsistent funding and technical assistance to conservancies.
- **High Priority for Needs-Based Assessments:** Essential for guiding technical and financial resource allocation effectively under the PFP and other forms of sustainable finance.

Key Enabler 2: Land Tenure

- **Key Issue:** Large areas of potential conservancy land in Kenya remain unadjudicated and unregistered.
- **Strategies to Address:**
  - **Government Resource Allocation:** Allocate resources to clarify and secure land tenure.
  - **Conservancy Support:** Provide support to conservancies in navigating land tenure processes.
  - **Cost Reduction:** Reduce costs associated with land registration processes.

Key Enabler 3: Spatial Planning

- **Ecosystem Management and County Spatial Plans:** Aligning these plans is essential for harmonizing regional conservation with local development goals.
- **Infrastructure Development:** Aligning with national spatial planning data is vital to integrate conservation goals with public infrastructure projects and ensure that they support rather than hinder conservation efforts.

Key Enabler 4: Human-Wildlife Conflict

- **Minimizing Human-Wildlife Conflict:** Achieved through holistic and effective land-use planning.
- **Maintaining Wildlife Space:** Ensures designated areas for wildlife, preventing uncontrolled land-use changes.
- **Effective Land-Use Planning:** Essential for coexistence and reducing conflicts between humans and wildlife.

3.1. Landscape Associations

We observe a high reliance on landscape associations by conservancies across Kenya. Furthermore, highly variable funding and technical assistance capabilities of landscape associations are recorded, with an overall low capacity to provide sufficient conservancy support.

Additionally, there is a lack of transparent needs-based assessments to guide technical and financial resource allocation to conservancies. As such, we suggest building the capacity of landscape associations and the provision of financial support as a high priority.

3.2. Land Tenure

Land Tenure Issues Recorded by Conservancy Landowners in Kenya

- Private landowners in conservancies with leasehold title in **Taita-Taveta** need clarity from the government lands offices to support the renewal of their leasehold tenure.
- Group conservancies require support and increased collaboration with government lands offices in regards to establishing titles, provision of cadastral data, and the registration of leases. This is largely in **Narok and Kajiado counties.**
- Conservancies **in Lamu County,** on public land, requested clarity from the government on the status of their conservancies and relationship to the underlying land.

43% of Kenya's conservancies are community conservancies, yet they represent 88% of all conservancies area, with their underlying land tenure being community land.

- Mature Community Conservancies (148,453ha, n= 7)
- Operational Community Conservancies (4,079,032 n= 49)
- Emerging Community Conservancies (5,155,965 n= 37)

In future, another 57 conservancies are proposed on community land, covering 2,632,669 ha. The underlying land tenure of these conservancies is critical to their success.

Unclear land tenure creates uncertainty regarding land ownership and hinders effective conservation efforts in some of the areas with the largest operational and proposed conservancies.

Without registered and titled lands, communities are unable to legally enter into contractual agreements around their land with private sector investors in the tourism, carbon and development spaces.

County governments have the legal mandate to manage and administer unregistered community lands; to this effect, they enter into contractual obligation over unregistered land in trust for the community. This lack of registration perpetuates boundary conflicts.

In Kenya, under the Community Land Act of 2016, the transition of former group ranches or trust lands into titled and registered community land is mandated. According to the Ministry of Lands, there are 23 counties hosting community lands, which consist of undissolved group ranches and unregistered community lands (formerly trust lands).

Out of the 309 undissolved group ranches identified when the Community Land Act was enacted, only 46 have completed the registration process and transitioned into registered community lands. 40 of the 46 are important for conservation, and have conservancies as key land uses. Many more of the remaining 263 are likely important for conservation, but this has yet to be established.

Despite former Trusts lands constituting the magnitude of community lands, their registration under Community Land Act is still farfetched. Only one community land - Kamuthe in Garissa County, has undergone registration and a title deed issued in the community name. There are about 16 former Trust lands that have undergone adjudication and community land registration units identified, but yet to be registered (including 2 in Taita Taveta; 4 in

Samburu; 1 in Baringo; 5 in Tana River; 4 in West Pokot 4). Additionally, Turkana County has 63 community land registration units ready for registration. A few of them currently have conservancies.

Large swathes of land remain unadjudicated and unregistered. Mandera, Wajir, Garissa, Isiolo, Tana River, Marsabit are still in the early stages of the community land registration process but have conservancies that cover a vast area, more than 6 million hectares at present:

- Emerging (4,077,428 ha, n= 17)
- Operational (2,663,343 ha, n= 16)

In addition, there are a number of proposed conservancies that could be supported under the 30x30 process, which would need land-tenure support in the future, including proposed conservancies (3,354,961 ha, n= 26).

The underlying slow uptake of the community land transition is due to constraints in financial and technical resources. The legal and policy framework is clear. However, the funding required to mobilise communities and provide facilitation to government officials is a limiting factor.

The cost of registering community land varies significantly based on factors such as whether it was a former group ranche or former trust land, land size, community population and distribution, and local customary decision-making processes.

These costs typically range from KES 2,000,000 to 8,000,000. At the higher end of this range, approximately KES 6,500,000 is allocated to cover expenses related to National and County Government officers, including costs for public consultations, election of community land management committees, community sensitization meetings, newspaper notices, draunty land offices lack awareness of the required procedures for registering community land.

Evidence-informed strategies pertaining to land tenure may be categorized by government resource allocation, conservancy support, and cost reduction and include several strategies.

Government Resource Allocation

- **Government Land Office -** streamlining the national and county government lands office process for conservancies on community, private and public land.
- **Training Materials -** circulation of material and training for both government officials and community members on the process of transitioning from trust land to Community Land.
- **Group Ranch Registration -** continue registering undissolved group ranches as community land.
- **New Community Land Inventories -** revise and submit inventories of community land in six key conservation counties (Mandera, Wajir, Garissa, Isiolo, Tana River, and Marsabit).
- **Government Budget Allocation -** allocation and prioritization of government budget to land offices in affected regions.

Conservancy Support

- **Mapping and Demarcation -** provision of resources to conservancies for boundary mapping with a surveyor.
- **Community Land Registration -** allocate funding and resources to conservancies for legal assistance, community engagement processes, and community mobilization efforts.

Green Fiscal Policy

- **Reduce Lease Registration Costs -** group conservancies must pay stamp duty on registered leases, which can create prohibitive costs. Alongside clarity on the tax regime for land-owners, this fee could be waived.

By bolstering the capacity of the government lands office and involving key stakeholders in the process, the transition of unadjudicated land to registered community land can be expedited, providing a solid legal foundation for conservation efforts and ensuring land tenure security for local communities.

This could be funded by a budget change under the PFP or NB to allocate more resources. In total, this would require more than KES 800 million (assuming ~100 community land transitions and support for material development and support costs) allocated over several years.

Category	Strategy	Description	Priority	Finance Mechanism	Technical Assistance Mechanism	Policy Need
Government Resource Allocation	**Land office**	Streamlining the national and county government lands office process for conservancies on community, private and public land.	High		Land Office Improvement	
	Training Materials	Circulation of material and training for both government officials and community members on the process of transitioning from trust land to Community Land.	High		KWCA, Lands Office	
	Register Group Ranches	Continue registering undissolved group ranches as community land.	High		Lands, Office Improvements	
	New Community Land Inventories	Revise and submit inventories of community land in six key conservation counties (Mandera, Wajir, Garissa, Isiolo, Tana River, and Marsabit).	High		LA, KWCA, Lands, Office Improvements	
	Allocation of the Government Budget	Allocation and prioritization of government budget to land offices in affected regions.	Mid		Lands, Office Improvements, LA	Government Budget Prioritisation
Conservancy Support	**Mapping and Demarcation**	Provision of resources to conservancies for boundary mapping with a surveyor.	Mild	Small Grants	Lands, Office Improvements, LA	
	Community Land Registration	Allocate funding and resources to conservancies for legal assistance, community engagement processes, and community mobilization efforts.	High	Small Grants	Lands, Office Improvements, LA	
Reduced Costs	**Reduce Costs of Lease Registration**	Group conservancies must pay stamp duty on registered leases, which can create prohibitive costs. Alongside clarity on the tax regime for land-owners, this fee could be waived.	Mild			Green Fiscal Policy

Table 20. Evidence-informed needs outlined for land tenure issues faced by conservancies.

3.3. Spatial Planning

Effective conservancy management requires spatial planning, which is led by county governments. LAs and KWCA, along with county governments can support conservancies to participate in this process by providing the technical assistance needed to bolster and ensure trained personnel in geo-information science (GIS) and spatial planning. If such support is available then the creation of accurate and community-driven plans is attainable, thereby increasing conservancy planning capacity.

3.3.1. County Spatial Plans

A county spatial plan represents a tool put in place to provide guidance on land use in a county. It is a ten-year GIS-based depiction of a county's socio-economic development vision and program, including the distribution of people and activities, within the context of efficient, productive and sustainable uses of land and other county spaces.

County governments in Kenya are responsible for county planning and development under Part 11 Article 8 of the Fourth Schedule of the Constitution. In undertaking this mandate, 47 counties are expected to formulate specific policies, strategies and guidelines, prepare county and urban spatial plans, carry out research on spatial planning within their area of jurisdiction, and participate in the preparation of regional spatial development plans. Furthermore, areas of importance for conservation are demarcated in county spatial plans.

County spatial planning can be improved by strengthening partnerships between LAs and county governments. This is achieved by facilitating memorandums of understanding (MOUs) between county governments and landscape associations.

Training of landscape association staff members on effective ways to engage in county planning and budget processes (e.g. Annual Development Plans and County Integrated Development Plans) hereby carries much significance. Facilitating coordination forums between LAs, county governments, and regional economic blocs is advisable to harmonize prospective conservation plans and priorities.

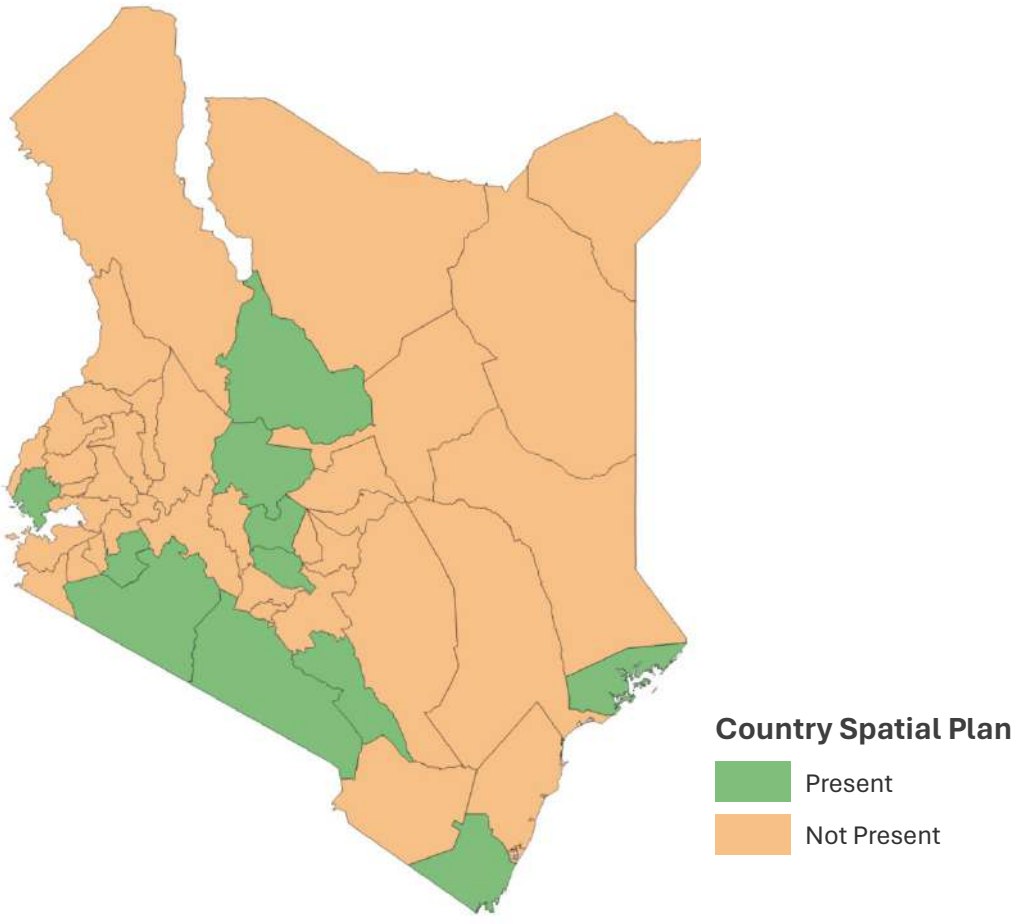


Figure 17. Map of Kenya depicting counties which have developed a county spatial plan.

A Checklist to Assessing Spatial Plans

- **Legal and policy framework** align with national and regional policies and laws, with a legal basis to ensure its implementation and enforcement.
- **Effective implementation** strategies set in place alongside regular monitoring and evaluation.
- **Management capacity** exhibits the necessary skills, resources, and systems for effective planning, coordination, execution, and implementation of development activities.
- **Community involvement** at every stage of planning ensures that local needs are addressed.
- **Livelihood considerations** to improve quality of life, health, access to education, employment and revenue opportunities.
- **Ecological and biodiversity** considerations involves creating an ecosystem approach to conservation by protecting vital habitats for year-round and seasonal use, and important corridors between them.
- **Sustainable and integrated approach** balances sustainable development and economic growth with environmental protection and social equity.
- **Livestock management** to prevent overgrazing, soil degradation, and safeguard sensitive habitats and wildlife.
- **Budget allocation** outline how financial resources are distributed among the different proposed projects or activities.
- **Economic viability** is key to ensuring the long-term sustainability of conservation efforts. Data-driven decision making based on accurate, up-to-date data, using GIS tools.
- **Adaptability, flexibility, and resilience** in responding to demographic shifts, economic changes, or environmental challenges.

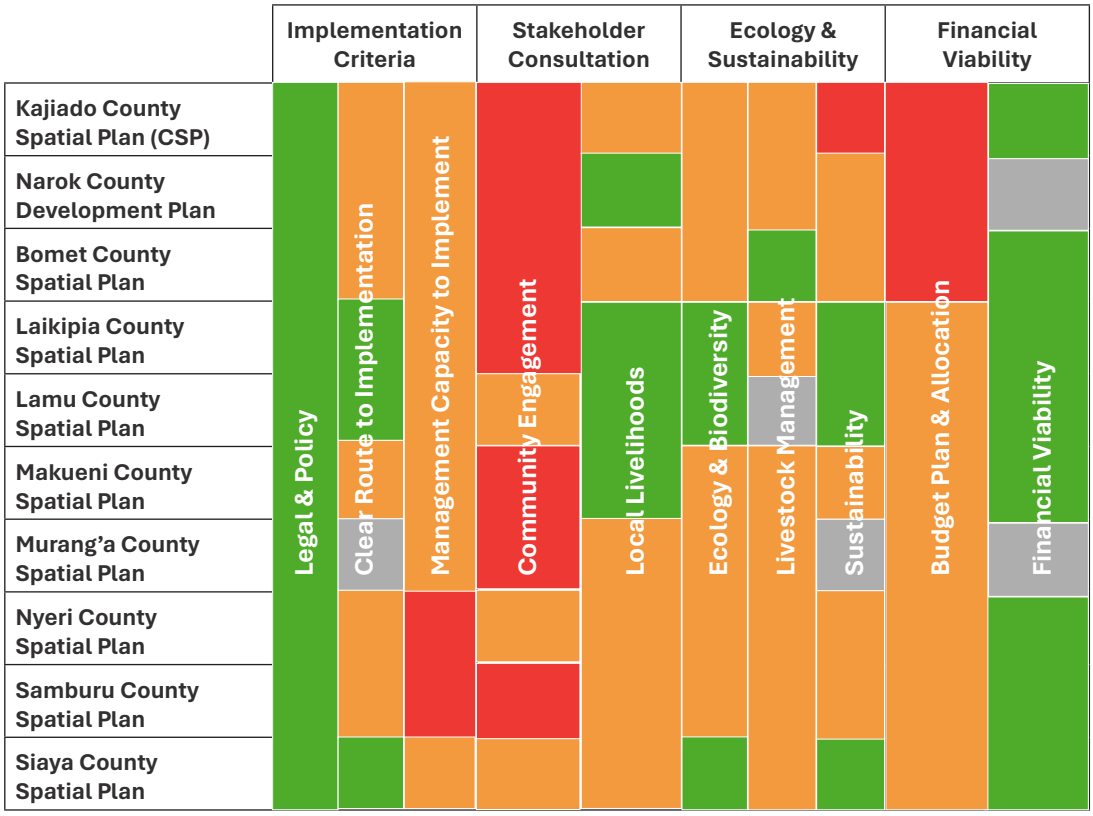


Figure 18. An overview of the current status of county spatial plans in Kenya. Green indicates the category has been well covered in the plan, amber is reasonably well covered, and red is poorly covered.

3.3.2. Ecosystem Management Plans

Ecosystem management plans outline a structured process to mitigate the impact of human activities on a particular ecosystem. The goal of ecosystem management plans is to foster sustainable development and land-use practices across a landscape, ensuring a holistic approach to the management of local natural resources and monitoring of ecological processes that serve social, economic, and cultural values. As of the latest update, there are four ecosystem management plans put in place across Kenya.

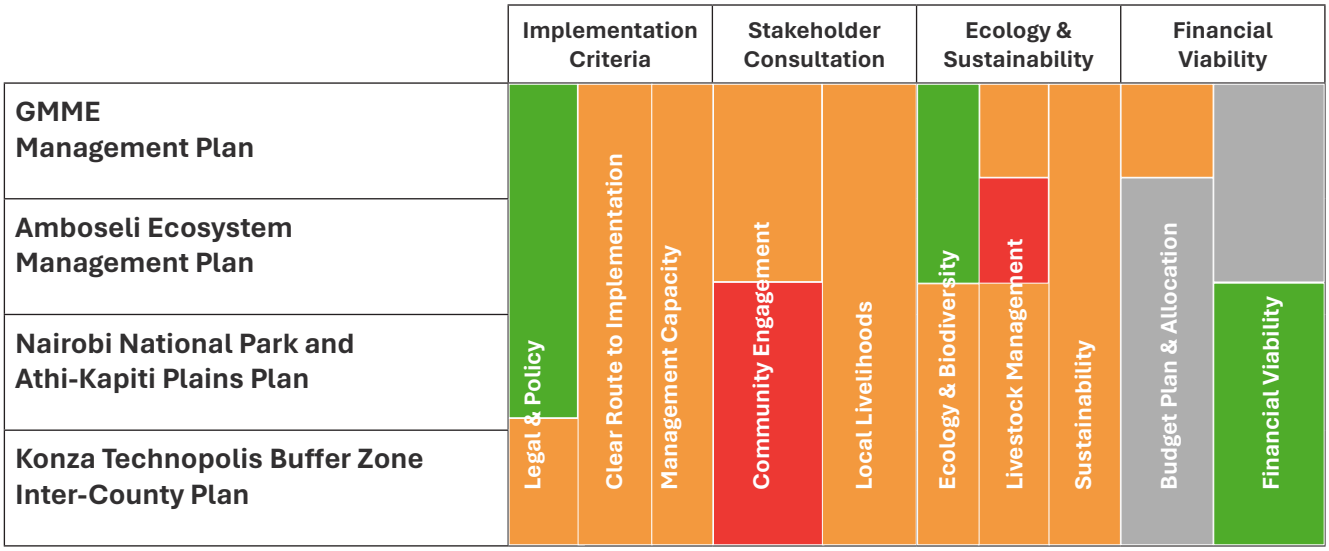


Figure 19. An overview of the current status of ecosystem management plans in Kenya. Green indicates the category has been well covered in the plan, amber is reasonably well covered, and red is poorly covered. Gray indicates no mention of that section.

Ecosystem management plans should be created to develop and gazette comprehensive management plans for the 40+ distinct ecosystems that Kenya contains. **Aligning ecosystem management plans with county spatial plans is essential to harmonizing regional conservation with local development goals. A limited number of plans exist at the ecosystem level, just five in total, along with ten county spatial plans.**

Furthermore, aligning infrastructure development with national spatial planning data is vital to integrate conservation goals with public infrastructure projects, ensuring that development initiatives support, rather than hinder, conservation efforts. In order to achieve this, the Plan Implementation Committees (PIC) requires increased and adequate funding to take required legal action and implement plans.

The Amboseli Ecosystem Management Plan (AEMP) serves as an exemplary model for effective spatial planning and implementation. This plan emphasizes the need for a comprehensive approach to managing land use and conservation efforts, balancing the needs of wildlife, local communities, and tourism. The AEMP is effective because it includes a robust implementation committee with the authority to enforce the plan's provisions legally. This legal basis ensures that all stakeholders adhere to the guidelines set forth, promoting sustainable practices and preventing activities that could harm the ecosystem. The plan's success also hinges on the financial and technical support from various partners, including governmental agencies, non-governmental organizations, and local communities. Furthermore, adequate funding is essential for the successful implementation of spatial plans like the AEMP. Financial resources are needed to support monitoring and enforcement activities, community engagement, and legal cases against the plan.

Overall, spatial planning, when backed by strong legal frameworks and adequate funding, can significantly contribute to the sustainable management of ecosystems. The Amboseli Ecosystem Management Plan demonstrates how such strategies can be effectively implemented, providing a valuable blueprint for other regions facing similar challenges.

As pertains to ecosystem management plans, we advise upon:

- Formulating ecosystem management plans detailing resource management, sustainable land use practices, and conservation priorities.
- Integrating ecosystem plans with existing and future county spatial plans for a cohesive strategy which supports ecological sustainability and economic development.
- Facilitating cross-sector collaboration to align these plans with national conservation strategies and international commitments.
- Aligning infrastructure development with national spatial planning data. This alignment is vital to integrate conservation goals with public infrastructure projects, ensuring that development initiatives support and do not hinder conservation efforts.
- Provide resources for PIC to implement plans.

Case Study: Amboseli Ecosystem Management Plan

The Amboseli Ecosystem Management Plan currently forms the only properly enforced ecosystem management plan in the country. A first version was drafted in 2008, followed by an initial NEMA-led strategic environmental assessment (SEA) in 2015 and official gazettement. The plan was renewed in 2020 and gazetted for a second time in 2021.

The plan effectively gives consideration to conservation, livestock, agriculture and tourism practices within the greater Amboseli ecosystem and is implemented and enacted upon by a Plan Implementation Committee (PIC). Thus far, under the plan, a National Environmental Tribunal ordered a stop-work order for several farms looking to develop in the region. This included the Kili Avo case, a controversial avocado farm near Amboseli National Park, which faced legal challenges due to its potential environmental impact. The National Environmental Tribunal ordered a halt to all activities on the farm, citing concerns over water abstraction and habitat disruption for wildlife such as elephants, lions, and zebras. PIC, supported by the Kenya Wildlife Service, argued that the farm endangered critical wildlife corridors and the local ecosystem.

Category	Strategy	Description	Priority	Finance Mechanism	Technical Assistance Mechanism	Policy Need
Capacity to plan	**Increase capacity of landscapes associations and conservancies**	LA have technical capacity that is not available to each conservancy, this should be bolstered to ensure trained personnel in GIS and spatial planning can support the creation of accurate and comminity-drive plans.	High		Landscapes Associations (LA)	
	Create Ecosystem Management Plans	Develop and gazette comprehensive management plans for Kenya's over for Kenya's over 40 distinct ecosystems. Align these plans to harmonize regional conservation with local development goals.	High		Spatial Planning	Establishment of Ecosystem Plans
	Align Ecosystem Plans with County and National Plans	Align infrastructure development with national spacial planning data. This alignment is vital to integrate conservation goals with public infrustructure projects, ensuring that development initiatives support and do not hinder conservation efforts.	High		Spatial Planning	
	Fund Plan Implementation Commitees	PIC lack the funding to take legal action and implement the plans.	High		Spatial Planning	

Table 21. Evidence-informed needs outlined for spatial planning issues faced by conservancies.

3.4. Human-Wildlife Conflict

Mitigating human-wildlife conflict is an important role of conservancies. Furthermore, reducing the economic and social burden of human-wildlife conflict is critical once an incident has occurred.

Minimizing conflict may be attained via holistic land-use planning, reducing conflict by promoting the creation of conservancies, which leads to increased co-existence and increased space for wildlife. Likewise, effective spatial planning prevents uncontrolled land-use change and reduces hard boundaries where conflict might occur.

Increasing monetary and non-monetary benefits for community members derived from conservancies, as well as guild- and species-specific mitigation strategies in areas where human-wildlife conflict persists should also form a priority. On the flip-side, minimizing losses encompasses strategies related to effective conflict response, local-level conservancy consolation initiatives, providing strategic

support to KWS field stations outside parks, and implementing a national human-wildlife conflict insurance strategy to provide funding for human-wildlife compensation.

Fencing can help mitigate HWC, however it can lead to fragmentation, disrupting natural migration routes. There are also ecological consequences, affecting plant dispersal, predator-prey dynamics, and genetic diversity, along with social disruption. Careful planning to balance conservation goals and human needs is an essential requirement here. OPC fencing for example is constantly evolving, driven by the need to balance wildlife conservation with the needs and safety of local communities.

Category	Strategy	Description	Priority	Finance Mechanism	Technical Assistance Mechanism	Policy Need
Minimising Conflict	**Conservancies and land-use planning**	Reduce conflict by promoting conservancy creation leading to coexistence and increasing space for wildlife	High	Small Grants, Investor Ready Grants, Concessional Debt	Multiple	
	Spatial Planning	Planning to prevent uncontrolled land-use change in order to reduce hard boundaries and mitigate conflict	High		Landscape Associations + Spatial Planning	Wildlife regulatory Authority (Ecosystem and conservancy plan)
	Increasing benefits from conservancies	Increase monetary and non-monetary benefits to improve tolerance and reduce costs	Mid	Small Grants, Investor, Ready Grants, Concessional Debt, Investment	LA, KWCA, Conservancy Management Support	Green Fiscal Policy Benefit-sharing
	Guild specific mitigation strategies	Herbivores specific mitigation (e.g. fencing) Carnivore specific mitigation (e.g. herding)	Mid	Small Grants	Landscape Association, Conservancy Management Support	
	Species-specific strategies	Species-specific strategies (e.g. Elephant toolkit; snake anti-venom distribution	Mid	Small Grants	Conservancy Management Support	
Minimising Losses	**National Human-Wildlife Conflict Compensation or insurance**	Implement the Wildlife Act 2013 and provide funding to HWC compensation	High	Direct Budgetary Allocation (NB)		
	Translocation and PAC	Improve KWS ability to respond to conflict, and relocate problem animals	Mid	KWS Budgetary Allocation (NB)		
	Conservancy- level consolation	Encourage local level conservancy consolation initiatives through sound business planning	Low		Conservancy Management Support	
	Effective conflict response	Provide sensitive, timely and considerate response to community members from conservancy management with adequate training	Mid	Small Grants	Conservancy Management Support	

Table 22. Evidence-informed needs outlined for human-wildlife conflict issues faced by conservancies.

Section Four: Realizing Outcomes:

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Support Packages for PFP and Other Forms of Sustainable Finance

For conservancies to become REDI they will need to progress through a number of different growth stages, from proposed to mature. To enable measured and sustained conservancy growth, ample support through technical assistance mechanisms is required, as are a range of different financing options, and a conducive policy environment.

We address evidence-informed needs as they relate to the systemic issues facing conservancies at different growth stages. Realizing system-wide growth across conservancies may be achieved by creating enabling conditions through the implementation of technical assistance levers, financing mechanisms, and policy levers.

- Technical assistance levers represent actors, strategies, and channels, which may provide conservancy-level support to build capacity amongst conservancies.
- Financing mechanisms actuate conservancy growth by providing different pathways to necessary financial resources.
- Policy levers incentivize contributions to conservation at multiple levels and include biodiversity fiscal incentives, actions surrounding government prioritization, and investments in conservation-compatible revenue streams.

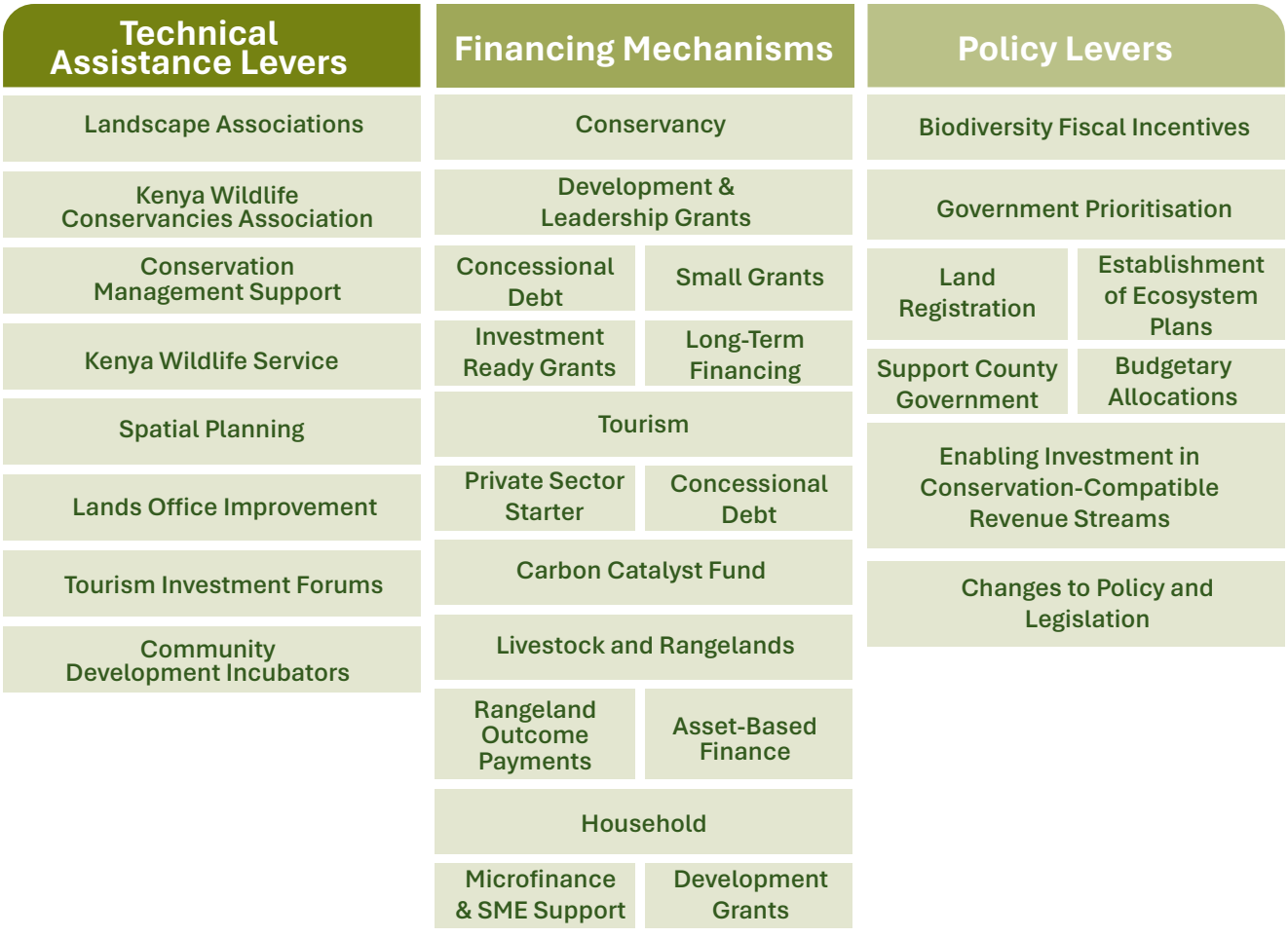

Figure 20. An outline of proposed PFP support packages.

4.1. Supporting Conservancies through Growth Stages: Evidence-Informed Needs

Securing a connected conservancy network that is REDI requires apt support through technical assistance levers, a range of durable financing mechanisms, and support levers enabling a conducive policy environment. As such, the evidence-informed needs of conservancies were identified and addressed in section 3.3 of this report, to outline several strategies for sustained conservancy support according to growth stages.

4.2. Technical Assistance Levers

Establishing and managing a conservancy is a complex process. Developing partnerships is often key for success and crucial for the provision of technical assistance and funding.

Without the right support, many conservancies will never be durably financed. To develop successful conservancies, a range of technical assistance levers are required from a number of actors. Additionally, a strong enabling environment should cater to the growing needs to strengthen inclusive governance, build management capacity, and encourage private sector engagement to ensure that conservancies and communities can flourish.

TA Lever	Role	Key Areas	PFP Priority
TA 1. Landscape Association	Landscape Association providestailored support to conservancies.	TA: admin and finance, governance, management planning, strategy & leadership, business planning & growth, land tenure and legal, social and environmental impact	High
TA 2. Kenya Wildlife Conservancies Association	Landowner-led national membership organization to represent conservancies and direct policy and investment.	TA: support Landscape Associations. Create enabling policies, secure investment for conservancies, represent conservancies.	High
TA 3. Conservancy Management Support	Establishing management partnerships (i.e. with NGOs).	TA: admin and finance, governance, management planning, strategy & leadership, business planning & growth, improved ranger/ scout activities, land tenure and legal, social and environmental impact	High
TA 4. Kenya Wildlife Service	KWS strategies to better support, regulate and supply services to conservancies. Register conservancies to ensure contribution to 30X30 biodiversity targets	Maintaining register of conservancies, registration incentives for conservancies including fiscal policy incentives, increased KWS representation across the country, adapt office/outpost locations to accommodate conservancies.	High
TA 5. Spatial Planning	Open & connected ecosystem-based conservation approach	Support to conservancies, ecosystem planning processes, counties on spatial planning	High
TA 6. Lands Office Improvement	Government lands office support for community land titles/registration	Bridging gap between investors and conservancies	High
TA 7. Tourism Investment Forums	Linking tourism investors to conservancies	Bridging gap between investors and conservancies	High
TA 8. Community Development Incubators	Enabling community-led sustainable development initiatives.	Supporting household-led initiatives	Mid

Table 23. Technical assistance levers

4.2.1. (TA1) Landscape Associations Support

Context: Landscape Associations (LAs) are integral components of Kenya's conservation landscape, serving as regional hubs that bring together conservancies to collectively address challenges, share knowledge, and work towards common goals. LAs provide tailored support to conservancies and technical assistance to administration and finance, governance, management planning, strategy and leadership, business planning & growth, land tenure and legal, social and environmental impact.

Roles: Fundraising, strengthening collaboration, problem-solving, solution development, ecosystem-wide joint vision and planning, policy advocacy, capacity building, networking/knowledge exchange, data collection and sharing.

Challenges: Highly variable provision of funding and technical assistance among LAs. Lack of capacity to provide sufficient support to conservancies. Lack of transparent needs-based assessments to guide technical/financial resource allocation.

Recommendations: Allocation of needs-based, context-specific, and equitable funding opportunities to Landscape Associations. This will include financing to LAs to support conservancies with the current services:

1. Admin and Finance

- **Overview:** Addressing gaps in current governance, training and guidance on HR, finance, admin, operations.
- **Duration:** Sustained engagement to build relationships and trust.
- **Skills Needed:** Experience working with conservancies; understanding of conservation, management, and admin.

2. Governance, Strategy, & Leadership

- **Overview:** Support strategy development and implementation, ensure management structures enable strategy success, capacity support to address leadership gaps.
- **Duration:** Sustained engagement to build relationships and trust.
- **Skills Needed:** Organizational capacity building, strategic planning, on-the-job training.

3. Business Planning & Growth

- **Overview:** Support to create a business plan, explore different forecasting scenarios to support planning, link business plan back to overall strategy.
- **Duration:** Initial provision with follow-up after 6-12 months.
- **Skills Needed:** Financial forecasting, business planning.

4. Land Tenure and Legal

- **Overview:** Support conservancies and landowners to register community land or develop lease structures.
- **Duration:** 6-12 months.
- **Skills Needed:** Legal expertise, governance, community mobilization, government interactions.

5. Social and Environmental Impact

- **Overview:** Support with survey design and data collection, social and environmental impact metric selection, monitoring & evaluation.
- **Duration:** Sustained at regular intervals.
- **Skills Needed:** M&E, conservation and socio-economic survey design, GIS, data analysis.

4.2.2 (TA2)
Kenya Wildlife Conservancies Association (KWCA) Support

Context: The Kenya Wildlife Conservancies Association (KWCA) is a landowner-led national membership organization that represents conservancies and directs policy and investments. KWCA supports landscape associations to enable policies, secure conservancy investments, and represent conservancies.

Roles: Building capacity among landscape associations, networking and communication, policy advocacy.

Challenges: Lack of bandwidth among LAs to support (initiation/early stage) conservancy development.

Recommendations: Coordination and development of conservancy business management plans. Provision of financial assistance and continued human resources support to conservancy management. KWCA Small Grants Facility – set aside money for high caliber candidates for CM roles.

KWCA Technical Assistance Packages include:

1. Tourism Investors Platform

- **Overview:** Develop action plan for conservancies marketing strategy, identify investment opportunities and link conservancies with potential investors.
- **Steps Forward:** Operationalize and activate investors forum for investors to identify investment-ready conservancies.

2. KWCA Self Regulatory Role

- **Overview:** Develop a 'principles and standards' document for conservancies, create a member 'code of conduct' for self-regulation.
- **Steps Forward:** Adoption and implementation of the principles and standards document by conservancies.

3. Governance and Management Assessment Tools

- **Overview:** Conduct Site-level Assessments of Governance and Equity (SAGE) across conservancies. Enhance conservancy governance and management capacity.
- **Steps Forward:** Design and implement a tailor-made tool integrating governance and management effectiveness. Optimise equitable share of sustainable monetary and non-monetary benefits to conservancies. Enhance conservancy resilience to climate change impacts. Mainstreaming inclusive and gender responsive practices in conservancies.

4. Conservancy Managers Training Programme

- **Overview:** Conservancy Managers Conference to share best practices, enhance leadership skills using Leadership and Management Program (LAMP).
- **Steps Forward:** Design leadership and management program, develop a curriculum for conservancy management in Kenya.

5. Provide support to LA and network building

- **Overview:** Provide technical support and training to LA. This includes supporting the LA and conservancy network.
- **Steps Forward:** This includes governance training, fundraising, legal and financial assistance, and policy support. Streamlining a representative governance structure for the conservancy network. Strengthening KWCA secretariat to effectively deliver mandate. Strengthen evidence based programming and adaptive knowledge management for institutional sustainability.

6. Policy support

- **Overview:** Provide technical support and training to LA.
- **Steps Forward:** This includes governance training, fundraising, legal and financial assistance, and policy support.

7. Enabling policies advanced to incentivize conservancy growth

- **Overview:** Securing land tenure rights for community conservancies, Strengthen policy and legal frameworks to incentivize conservation on community and private land. Empower conservancies to realize legal rights and capacity for compliance

8. Securing durable financing for locally-led conservation

- **Overview:** Build a case for increased funding to locally-led conservation and source conservancy funding.
- **Steps Forward:** Design platforms to expand funding from government, conservation, and development partners. Unlocking private sector investments.

4.2.3. (TA3) Conservancy Management Support

Context: To improve the management capacity of Conservancies in Kenya, it is essential to provide dedicated technical support in several key areas. Conservancies across southern Kenya are now well established and have strong governance and early-stage support from landscape associations. However, many conservancies struggle with the financial capacity to employ people with diverse technical skills required to ensure they are well-managed, well-governed, and durably financed. Establishing a conservancy support body to provide dedicated technical assistance, in a long-term and patient manner, will help facilitate partnerships that support various stages of conservancy development.

Roles:

- This support encompasses technical assistance with administration and finance, governance, management planning, strategy and leadership, business planning and growth, improved ranger/scout activities, GIS, land tenure and legal aspects, as well as social and environmental impact considerations.

Challenges:

- Difficulties in identifying a lead partner.
- Lack of funding.

Recommendations:

- Increase role to professionalize management services.
- Capacity building of human resources management, financial management,and ranger/scout activities.

Examples of Conservancy Management Support

Namibian Association of Community Based Natural Resource Management (CBNRM)

In Namibia an association has been established to harness the wide range of skills available in Government, NGOs and the University of Namibia into a complementary nation-wide Namibian Association of Community Based Natural Resource Management (CBNRM) support service.

The rationale behind this is that it is unlikely that any single institution houses all of the skills, resources and capacity to provide community organisations with the multi-disciplinary assistance that is required to develop the broad range of CBNRM initiatives taking place in Namibia. These skills include advice on governance and institutional issues, on natural resources management and assistance with financial and business planning.

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The Greater Mara Management Company (GMMC)

-This was an organization established to oversee and coordinate the management and conservation efforts within the Greater Mara Ecosystem in Kenya.

Key roles included:

1. **Conservation Management:** GMMC aimed to ensure sustainable conservation practices across the Greater Mara Ecosystem. This involved working with various stakeholders, including conservancy managers, landowners, and local communities, to implement strategies that protect wildlife and their habitats.
1. **Tourism Oversight:** The company helped manage tourism activities to ensure they were sustainable and did not negatively impact the environment. This included regulating the number of visitors, managing safari vehicles, and ensuring tourism revenues were used for conservation and community development.
1. **Community Engagement:** GMMC played a crucial role in engaging local communities, ensuring they benefited from conservation and tourism activities. This included facilitating community-led conservation initiatives, education programs, and revenue-sharing mechanisms.
1. **Coordination and Collaboration:** The organization served as a coordinating body, fostering collaboration between different conservancies and stakeholders. This included sharing best practices, resources, and data to enhance the overall management of the ecosystem.
1. **Anti-Poaching Efforts:** GMMC was involved in anti-poaching initiatives, working to protect endangered species from illegal hunting and trafficking. This included supporting ranger patrols, surveillance, and law enforcement efforts.

GMMC promoted sustainable conservation and management practices in regions of ecological significance. It has since been restructured and its functions have largely been absorbed by the LA MMWCA, supporting governance, conservation efforts, and sustainable revenue models for the conservancies.

@Jonathan Kaelo

Toolkits:

- Adopt, implement, and disseminate management assessment tools (i.e., SAGE, IMET) and an integrated governance and management training toolkit tailored to conservancies in Kenya.

Mechanisms:

- Appropriate mechanisms include TA grants (governance training, FPIC, HR, course materials), development, and leadership grants (training management/boards on roles and responsibilities).

Furthermore, dedicated technical support on carbon and biodiversity markets, project management and implementation, work planning and ranger administration, human-wildlife conflict mitigation toolkits and policy provision, and awareness creation around financial resilience of novel funding types, will significantly contribute to the sustainable development and resilience of these conservancies.

1. Livestock management

Overview:

- Grazing management
- Livestock management
- Support with value chain development and links to market

Duration of engagement:
Intensive support needed initially with shorter follow ups 6, 12, 18 months after?

TA Team skills:
Livestock management (in conservation areas)

2. Human-Wildlife Conflict Mitigation

Overview:

- Spatial & land-use planning
- National HWC compensation or insurance, conservancy-level consolation
- Effective conflict response

Duration of engagement:
Sustained engagement at regular intervals

TA Team skills:
Spatial planning, GIS, administrative and finance skills, ranger/scout capacity building

3. Ranger/Scout Training

Overview:
Enhance KWS & KFS staff and ranger capacity through training to monitor wildlife, forests, and mitigate conflict Increase number of rangers and provide better infrastructure/operating conditions

Duration of engagement:
Sustained engagement at regular intervals

TA Team skills:
Ranger training, security, capacity building

Figure 21. Examples of Dedicated Technical Support for Conservancy Management Needs

4.2.4 (TA4) Kenya Wildlife Service (KWS)

Context: Under the Wildlife Conservation and Management Act, Kenya Wildlife Service (KWS) plays a pivotal role in the management and support of conservancies in Kenya by regulating and overseeing wildlife conservation efforts, ensuring the protection and preservation of wildlife, and enforcing wildlife protection laws.

KWS collaborates with various stakeholders, including community conservancies and international bodies, to enhance conservation initiatives and promote sustainable practices. Additionally, KWS conducts vital research and monitoring to inform management decisions, engages with local communities to raise conservation awareness, and supports community conservancies with training and resources. They are also responsible for promoting sustainable wildlife tourism, building capacity within conservancies, and mitigating human-wildlife conflicts to foster coexistence between wildlife and local populations. They are also a focal point for reporting to the World Database on Protected Areas (WPDA). Conservancies must be KWS registered to ensure their contribution to protecting 30% of Kenya's terrestrial ecosystems is accounted for in Kenya's 30X30 biodiversity targets.

Roles: According to the Kenya Wildlife Act (2013), KWS has a legal mandate to improve the provision of services to conservancies (i.e. office/outpost locations), engage in community outreach/education, and streamline the legally mandated process of registering conservancies.

Challenges: Closing the Kenya-wide conservancy registration gap (only 10% registered). Currently, registration is a complex bureaucratic process, with limited provision of technical support and muddled benefits. In addition continued support for conservancies is needed for their management and operations.

Recommendations: Registration incentives for conservancies including fiscal policy incentives and provision of subsidised TA services to registered conservancies, outreach to promoted nationwide communication/education plan, implement strategic directional change KWS core remit to continue support of rangers and HWC mitigation, capacity building, includes increased KWS representation across the country; adapt office/outpost locations to accommodate conservancies.

Current benefits of conservancy registration with KWS

> Registration as a conservancy makes it more likely to get support from both county and national government for management and operations. It also increases access to funding opportunities e.g. the recent 475 million (KES) support to 20 conservancies to develop water and road infrastructure. Moreover, county and national governments are increasingly classifying undeveloped tracts of land as idle. Formal recognition by the government (KWS) that a landowner is using their land for conservation enhances land security, particularly for private landowners. For communities, this recognition reduces the likelihood of large-scale government infrastructure projects encroaching on their land, thereby validating conservation initiatives as a legitimate land use.

4.2.5 (TA5) Spatial Planning

Context: Spatial planning contributes to an open and connected ecosystem-based conservation approach and provides support for conservancies, ecosystem planning processes, and county planning. Only 2 or 3 of the potentially 40+ ecosystems have gazetted plans, and none of the current plans are supported by the national government during implementation. Few country plans are developed with strong conservation principles. Deriving a more comprehensive and impactful approach to conservation by propagating land use planning that is cognizant of national conservation plans.

Roles: Contribute to an open and connected ecosystem-based approach to conservation. This requires support from national and county governments to drive the creation and implementation of ecosystem plans.

Recommendations: LA assistance in developing a joint vision for scaling up conservancies within their remit and developing ecosystem plans.

- Technical Assistance will be required to ensure that ecosystem plans, county planning, along with the plans incorporated into the wildlife migratory corridors and dispersal areas report are aligned and complement each other. Allocation of resources to relevant, accurate, and enforceable ecosystem/county plans and country-level. Provision of resources to establish plan implementation committees.
- In addition this process should facilitate MOUs between relevant county governments and LAs, train relevant LAs staff on effective ways to engage in county planning and budget processes (e.g. Annual Development Plans and County Integrated Development Plans), and facilitate coordination forums between LAs, county governments and regional economic blocs to harmonize conservation plans and priorities. This would ensure that the national, county and community land, ecosystem planners can effectively execute these plans.
- The Athi-Kapiti Ecosystem Report has been crucial for informing decision-making processes, guiding conservation actions, and securing funding for conservation projects in the region.

4.2.6. (TA6) Improving Government Lands Offices

Context: Land tenure is a vital aspect of a conservancy's mandate and ability to implement natural resource management, however several problems exist across the country that need support from National and County governments.

- **Community:** Former group ranch or trust land is to transition into registered community land. Without this communities are legally unable to enter into contractual agreements with private sector investors. This is the largest challenge faced by these conservancies.
- **Private:** Private landowners with leasehold titles need clarity from government lands offices to support the renewal of their leasehold tenure. Group conservancies require improved collaboration regarding title searches, provision of cadastral data, and lease registration.
- **Public Land:** Conservancies on public land need clarity on the status of conservancies and their relationship to the underlying land.

Roles: Need support directed to the Government Lands Office to be able to achieve apt transition and for legal, FPIC, community mobilisers and surveyors to be actively involved in the process. In addition Lands Offices can support private and group conservancies to gain the information they need, and register leases and conduct searches when needed.

Recommendations: Streamlining of registration process in national and county government lands offices, training government and communities on transitioning from Trust to Community Land. Continue to register undissolved group ranches as community land. Accelerate inventories of community land in 6 counties key for conservation (Mandera, Wajir, Garissa, Isiolo, Tana River, Marsabit)

Allocation and prioritisation of the government budget to land offices in affected regions.

4.2.7. (TA7) Tourism Investment Forums


@Basecamp Explorer

Context: Tourism generates significant returns for conservancies and local communities, and is a growing market. Conservancies depend on tourism income through conservation fees, bed night fees, lease fees, and charges levied for other services and activities. A Tourism Investment Forum is needed to establish partnerships and link conservancies to viable private sector investors.

Roles: Tourism funding plays a major role in the sustained financial durability of conservancies; agreements are to be structured to provide the most equitable options for communities. Support, product diversification (i.e. not just high end).

Opportunity: Many national parks/reserves at capacity; a huge opportunity for conservancies to build long term relationships with potential tourism partners seeking to expand into new areas.

Challenges: Identifying prospective tourism partners and assisting potential investors to find viable conservancies.

Recommendations: Creation of a (KWCA implemented) tourism platform, linking potential investors from the private sector to conservancies.

Example: KWCA Tourism Investment Forum

A first of its kind in Kenya; presents an opportunity for conservancy stakeholders to inform the KWCA marketing strategy and explore opportunities/lessons learnt in conservancies as a tourism destination by:

- Validating and developing an action plan for the implementation of a conservancies marketing strategy.
- Identifying investment opportunities in conservancies and link conservancies with potential investors.
- Developing an investment prospectus to showcase conservancies that that are investment ready to potential investors.
- Aimed to start dialogue on developing pathways to grow tourism investments as a means of enhancing sustainability and resilience of conservancies and local livelihoods.

Attracting global Investment

The Big North for example attracts investment into Kenya through various strategies aimed at leveraging the region's natural resources, community-driven conservation efforts, and sustainable development projects.

Through ecotourism initiatives they help establish and manage eco-friendly lodges and camps within community conservancies, attracting tourists interested in sustainable and authentic travel experiences. These facilities provide jobs and revenue for local communities, with profits reinvested in conservation and community projects.

Partnerships with international tour operators and travel agencies help market these experiences globally. Infrastructure development such as improving road networks and transportation infrastructure helps facilitate access to remote areas, which in turn boosts tourism and trade.

4.2.8. (TA8) Community Development Incubators

Context: Mechanisms to accommodate and facilitate community-led implementation of sustainable development initiatives and income generating activities within conservancies.

Roles: Contribute to community-led and inclusive conservancies driven by the aspirations of the community, which are transparent, inclusive, equitable and just in their operations.

Challenges: Lack of opportunities experienced by conservancy and dependent/adjacent communities in exploring alternative livelihood strategies and income generating activities.

Recommendations: Investing in social needs of the community through development/livelihood grants, which are made available to community proposals for group projects, or potentially to individuals if a graduation approach is used, which could link to some of the financing mechanisms proposed below.

The NRT Conservancy Livelihoods Fund (CLF)

This fund is a financial mechanism established by the Northern Rangelands Trust (NRT) to support sustainable livelihood projects within its network of community conservancies in northern Kenya. It aims to empower local communities by providing financial resources for income-generating activities and sustainable livelihood projects.

The fund invests in building the capacity of community members, particularly women and youth, through training, skills development, and entrepreneurship support.

Projects funded by the Livelihoods Fund are typically community-driven, with input and participation from local stakeholders. NRT ensures that funded projects adhere to sustainable practices and contribute positively to community well-being and conservation goals. Through collaborates with donors, development partners, government agencies, and NGOs the fund is able to leverage resources and expertise.

4.3. Financing Mechanisms

For conservancies to become REDI and to achieve 30x30, a range of different financing mechanisms specific to conservancy status and actors are needed.

At the conservancy level, considerations include the capacity of the conservancy and local actors involved as well as the location/accessibility, infrastructure, and scope for revenue generation of the conservancy.

Appealing to investors and potential for revenue diversification form important considerations.

In addition to the aforementioned, it remains important to take into account the complexity and scale of required investments, ensuring that they may be applied holistically.

We found that six types of financing mechanisms will be needed to achieve the 30x30 targets in a REDI manner and to address the current technical and financial gaps experienced by conservancies. In addition four mechanisms targeting private sector actors, and two targeting households will be important.

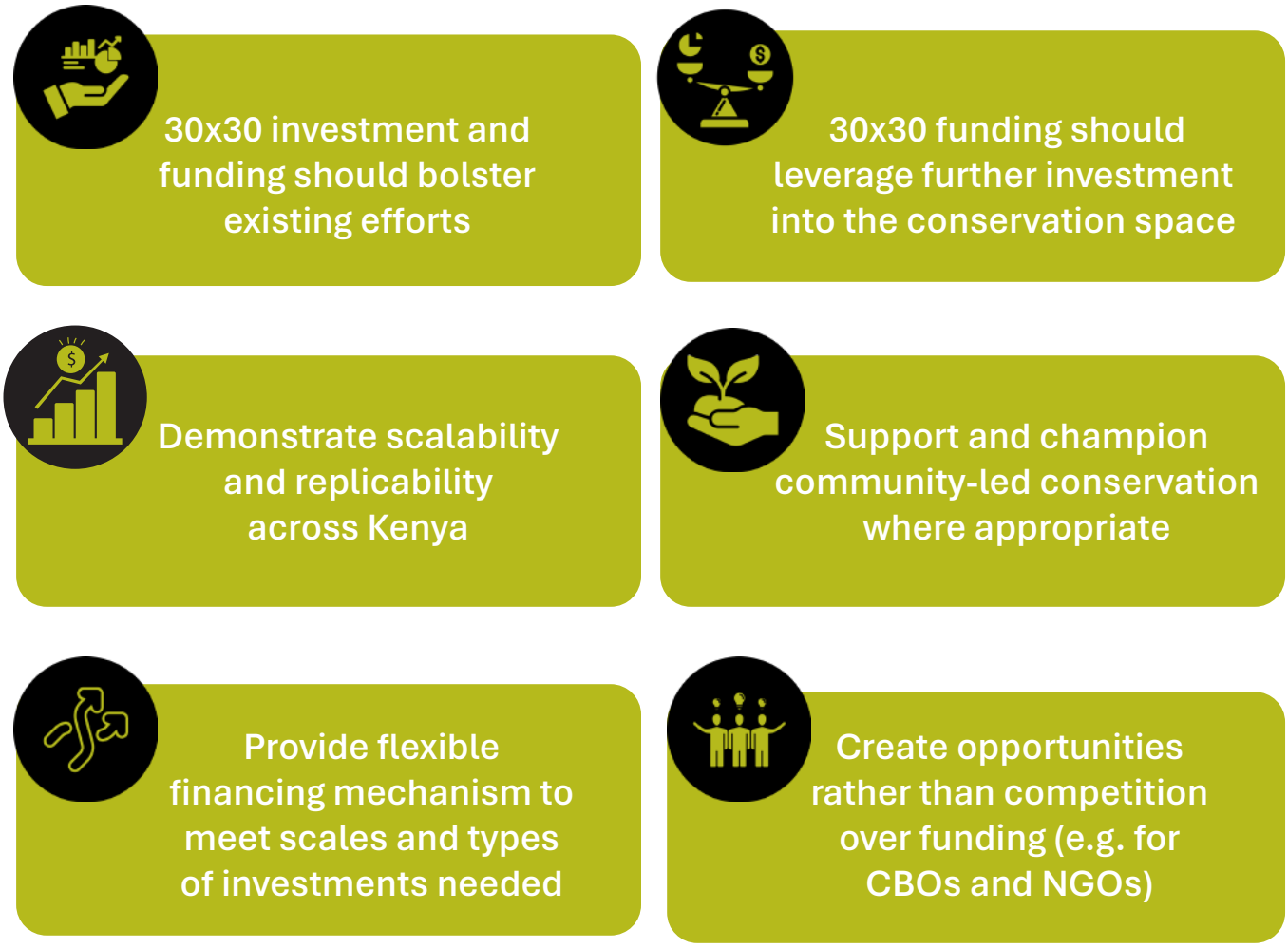


Figure 22. Key PFP design principles to strengthen financing mechanisms in conservancies.

Financial Mechanism	Intended Actor	Role	PFP Priority
FM 1. Small Grants	Conservancy	Support early-stage consevancy development	High
FM 2. Development and Leadership Grants	Conservancy	Support early stage consevancy leadership	High
FM 3. Investment Ready Grants	Conservancy	Spur private sector engagement in operational conservancies	Mid
FM 4. Concessional Debt	Conservancy	Increase prospects for large-scale private sector engagement in mature/operational conservancies	Low
FM 5. Long-Term Financing/ Endowment	Conservancy	Long-term guarantees of conservancy core operational costs from Trust Fund	Mid
FM 6. Outcome-Based Payments for Rangeland/ Livestock Management	Conservancy (Livestock)	Sustainable outcome based payments to sustainably manage Rangelands with additional benefits to wildlife	Low
FM 7. Private Sector Starter Grants	Private Sector (Tourism)	Stimulate local private sector market, help catalyse investment into emerging conservancies	Mid
FM 8. Concessional Debt	Private Sector (Tourism)	Incentives for private sector to develop medium risk oppotunities in carbon/tourism sectors	High
FM 9. Carbon Catalyst	Private Sector (Carbon)	Catalize and increase in private sector financing for conservation projects	High
FM 10. Microfinance	Household	Address loan access barriers that exist around access to finance and livelihoods diversification	Mid
FM 11. Livelihood Development Grants	Household	Grants acess to comunity proposals for group projects surrounding livelihood diversification.	Low
FM 12. Livestock Asset Finance	Private Sector (Livestock)	Create conservancy revenue streams from livestock beef production	Low

Table 24. Financing mechanisms outlined to support conservancy growth in Kenya.

4.3.1. (FM1) Small Grants

Actor: Conservancy

Priority: High

Rationale: Proposed and emerging conservancies require sufficient capital to build consensus, create institutions, support core operations, and basic CAPEX.

Financing Mechanism: Grants direct to emerging conservancies to support early to mid-stage development.

Size of Mechanism: Large, sufficient to support the vast number of conservancies on a case-by-case basis.

Average Ticket Size: USD 50,000

Importance: Allows for the core functions of a conservancy to be developed regardless of private sector engagement or investability.

Existing Mechanisms: KWCA Small Grants Facility, NGOs and bi-laterals e.g. USAID, ad hoc support.

Eligibility: Legal entity; manager in place; finance managed sufficiently well; consensus building achieved; limited current investments; demonstrated need for CAPEX, OPEX, and governance support.

4.3.2. (FM2) Development and Leadership Grants

Actor: Conservancy Priority: High

Rationale: Conservancy establishment is o

Financing Mechanism: Grants to landscape associations or direct to leadership/individuals to support early-stage development.

Size of Mechanism: Sufficient to support >10 proposed or emerging conservation areas and leaders annually.

Average Ticket Size: USD 10,000

Importance: High if we want to increase the chance of conservation uptake at the grassroots.

Existing Mechanisms: None

Eligibility: Proposed or emerging with greater flexibility.

4.3.3. (FM3) Investment Ready Grants

Actor: Conservancy Priority: High

Rationale: Early growth conservancies lack the infrastructure and management capacity to attract and professionally engage with the private sector.

Financing Mechanism: Grants or repayable grants (in the case of guaranteed investments) direct to operational conservancies to spur private sector investments.

Size of Mechanism: Medium Average Ticket Size: USD 100,000

Importance: Allows for the conservancy to invest in CAPEX and management capacity required by private sector investors.

Existing Mechanisms: Platcorp Foundation & Basecamp Foundation, WWF, TNC.

Eligibility: Not a CBO; finance managed sufficiently well; land-tenure demarcation clear; no current investments but large potential for investment in carbon or tourism; ability to manage reasonable budgets; demonstrated need for CAPEX, OPEX, and governance support to bridge this gap and get an investor.

4.3.4. (FM4) Concessional Debt

Actor: Conservancy

Priority: Medium

Rationale: Operational conservancies lack the infrastructure and management capacity to increase prospects for large-scale private sector engagement.

Financing Mechanism: Concessional debt and repayable grants to conservancies, underwritten by current or future private sector investment.

Size of Mechanism: Medium Average Ticket Size: USD 300,000

Importance: Allows for the conservancy to invest in CAPEX and management capacity required by current and new private sector investors.

Existing Mechanisms: CIs ACF and Tunza.

Eligibility: Finance managed well; land-tenure demarcation clear; current investments supporting cash flow and balance sheet, with room for growth; demonstrated need for CAPEX, OPEX, and governance support to bridge this gap and increase return from new or current investors.

4.3.5. (FM5) Long-Term Financing/ Endowment

Actor: Conservancy

Priority: Medium

Rationale: Some conservancies have no short or long-term prospect of generating revenues via existing donors or private sector, yet may be of critical importance for biodiversity and communities.

Financing Mechanism: Long-term guarantee of conservancy core operational costs from the Trust Fund.

Size of Mechanism: Large

Average Ticket Size: USD 50,000 - 200,000 per year per conservancy

Importance: High

Existing Mechanisms: N/A

Eligibility: Emerging and developing conservancies unable to secure long-term investment, in key landscapes.

4.3.6. (FM6) Outcome-Based Payments for Rangeland / Livestock Management

Actor: Conservancy

Priority: Low

Rationale: Outcomes-based payments for rangelands/livestock management tie financing to the achievement of measurable outputs and can be used to incentivize performance.

Financing Mechanism: Facilities that support outcomes-based payments for rangeland/livestock management.

Size of Mechanism: Unknown Average Ticket Size: Medium

Importance: Solution is needed to incentivize livestock owners to implement grazing plans and focus on outcome-oriented targets, such as improvement in soil health, water, etc.

Existing Mechanisms: Some conservancies have grazing plans. Current funding into the livestock sector focuses on disease prevention, breed programs, feeding lots, fodder improvement, etc.

Eligibility: Legal entity; manager in place; finance managed sufficiently well; consensus building achieved; limited current investments.

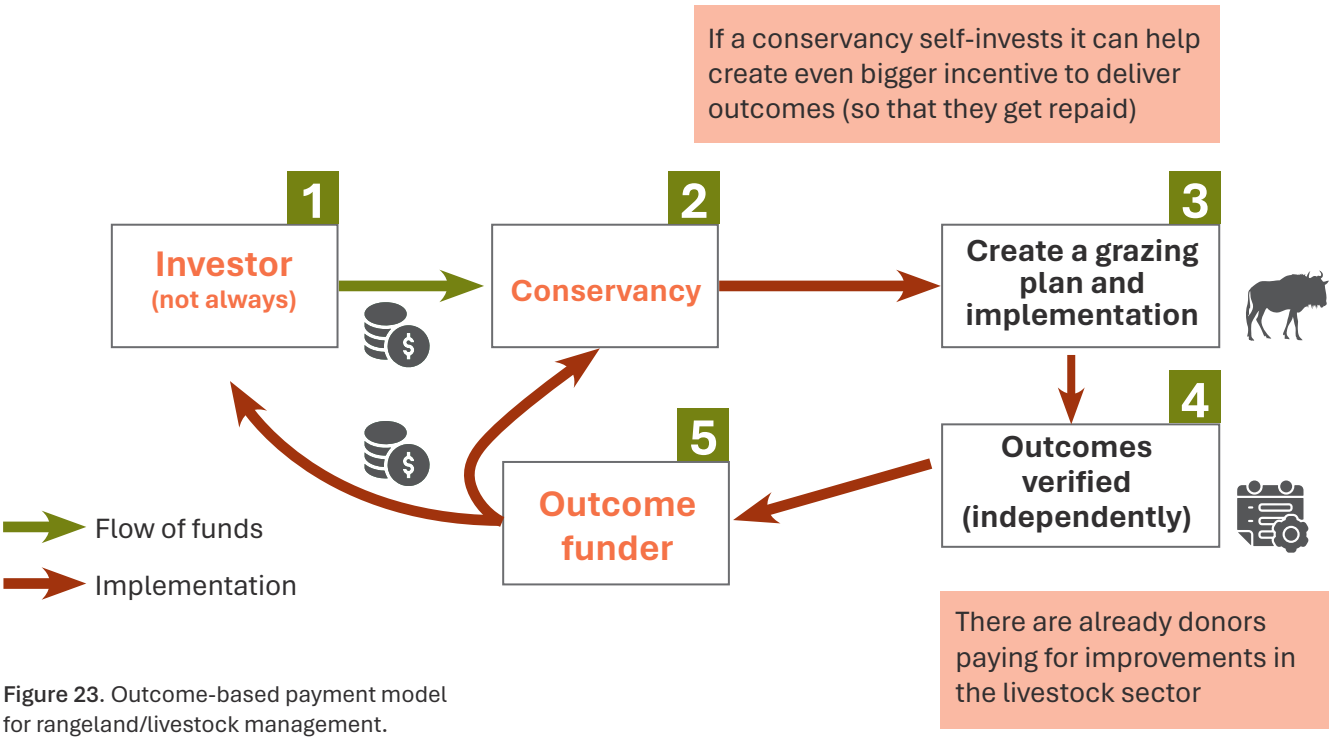


Figure 23. Outcome-based payment model for rangeland/livestock management.

4.3.7. (FM7) Private Sector Starter Grants

Actor: Tourism

Priority: Medium

Rationale: To stimulate the local private sector market and help catalyze investment into conservancies at earlier stages of growth.

Financing Mechanism: Support to smaller tourism based enterprises.

Size of Mechanism: Medium

Average Ticket Size: USD 20,000 - USD 100,000

Importance: Creates viable options for conservancies that are 'less attractive' for investment and create small yet underpinning finance for conservancies.

Existing Mechanisms: N/A

Eligibility: Based on the conservancy stage-would only be available to conservancies where early investment had high risk.

Tourism Starter Grant Example

Lions Bluff Lodge in Kenya was established as a community-based eco-lodge in the Lumo Community Wildlife Sanctuary. It attracts tourists interested in eco-tourism and wildlife conservation, contributing to the local economy and promoting environmental awareness. It serves as a model for other eco-lodges and tourism initiatives seeking to balance economic development with environmental conservation and community empowerment.

The startup funding for Lions Bluff Lodge was a collaborative effort involving local communities, private investors, conservation NGOs and international donors.

This multi-source funding approach ensured the project's sustainability and alignment with both conservation and community development objectives.

4.3.8. (FM8) Concessional Debt for Tourism

Actor: Tourism

Priority: High

Rationale: Provide incentives for the private sector to develop medium-risk opportunities that are impact-first in both carbon and tourism sectors.

Financing Mechanism: Concessional debt to private sector investors, concessionality linked to impact.

Size of Mechanism: Unknown

Average Ticket Size: USD 500,000 - USD 3,000,000

Importance: Important to catalyse sustainable finance of the region.

Existing Mechanisms: Concessional debt for tourism operators looking for high-impact projects is available through Africa Conservation and Communities Tourism Fund and in some cases CI Ventures.

Eligibility: Finance managed well; land-tenure demarcation clear; current investments supporting cash flow and balance sheet, with room for growth; demonstrated need for CAPEX, OPEX, and governance support to bridge this gap and increase return from new or current investors.

4.3.9. (FM9) Carbon Catalyst

Actor: Carbon

Priority: High

Rationale: There is a need for carbon credits, a catalyst program would allow conservancies with developers to explore investment options, before graduating on to equity or debt based structures, which are wide-spread in the market.

Financing Mechanism: Africa Forest Carbon Catalyst Grants

Size of Mechanism: ?

Average Ticket Size: USD 50,000 - USD 500,000

Importance: Currently there is a lack of access to funds to early stage carbon project development, without developers or communities taking risk.

Existing Mechanisms: Africa Forest Carbon Catalyst (TNC)

Eligibility: Legal entity; manager in place; clearly demarcated boundaries; consensus building achieved.

4.3.10. (FM10) Livestock Asset Finance

Actor: Livestock

Priority: Low

Rationale: Well-managed livestock present a potentially profitable revenue stream compatible with conservation goals and land management. Revenue from livestock can flow back to the local community and/or landowners.

Financing Mechanism: Livestock asset/stock finance provides farmers and ranchers with the necessary capital to purchase, manage, and grow their herds, leveraging the value of their livestock as collateral. This type of financing supports agricultural productivity and economic stability by enabling efficient and scalable livestock operations.

Size of Mechanism: Small - tailored to a subset of conservancies Average Ticket Size: USD 400,000

Importance: Potentially important to improve land management.

Existing Mechanisms: Tunza. Several organizations provide this type of financing, including the Kenya Livestock Finance Trust (K-LIFT), which offers loans specifically tailored for livestock farmers and businesses involved in the livestock value chain. However, these are at commercial rates, and may be difficult to repay when creating mixed-livestock-wildlife systems.

Eligibility: Mature conservancies where there is an appetite for conservancy managed herd; conservancy land-tenure demarcation clear.

4.3.11. (FM11) Microfinance

Actor: Households

Priority: Low

Rationale: Microfinance products could help address challenges created through reduced dependence on natural resources and existing barriers to access finance and livelihood diversification.

Financing Mechanism: Access to loans and/or repayable cash with TA.
Size of Mechanism: Medium

Average Ticket Size (Household): USD 500 - USD 10,000

Importance: Medium

Existing Mechanisms: Under development to support landowners in the Maasai Mara as part of the Tunza Fund. NRT Sacco provides finance to its members. Multiple other microfinance products exist, but are not tailored to conservation concepts.

Eligibility: Landowners within the conservancy.

4.3.12. (FM12) Livelihood Development Grants

Actor: Households

Priority: Low

Rationale: Landowners and other conservancy-dependent/adjacent communities need support to explore revenue generation and livelihood strategies not solely dependent on natural resources.

Financing Mechanism: Grants available to community proposals for group projects or potentially to individuals if a graduation approach is used.

Size of Mechanism: Small

Average Ticket Size: USD 100 - USD 10,000

Importance: Medium

Existing Mechanisms: NRT Conservancy Livelihood Fund

Eligibility: Landowners within the conservancy

4.3.13 Special Considerations

Western Kenya - A Different Approach?

Agricultural production is one of the largest threats to sustainably financed conservation. This is particularly true in irrigated agricultural land. When using rivers, streams, dams, or groundwater to irrigate high-revenue crops like tomatoes, avocados, and onions, agriculture usually outperforms conservation by orders of magnitude in terms of revenue generation. However, **well-managed agricultural landscapes can be important areas for biodiversity conservation** and **ecosystem service provision**, which complement sustainable livelihoods.

Western Kenya is an **important agricultural region** in Kenya but is also **rich in biodiversity** and home to some lesser-known mammals, birds, and amphibians. Demographic pressures and unsustainable land use practices are just some of the threats facing this uniquely biodiverse region. These challenges result in increasing agricultural production at the costs of forest cover, which will drastically alter habitat availability for forest-dependent species.

Motives behind conservancy creation: As evidenced in the deep dive interviews with conservancy managers, conservancies in western Kenya are often born out of a response to environmental degradation, human encroachment or in the hope of a more profitable livelihood option e.g. generating income through domestic tourism.

Severe lack of technical assistance and funding: These conservancies are small, often lacking official governance structures and attract very little interest from philanthropic donors - resulting in them being considerably underfunded. Infrastructure is severely lacking and funding is often out of pocket from the landowners/communities.

Due to its unique biodiversity, conservation solutions for western Kenya will require a mixed approach that ensures the preservation of indigenous forests.

Most of the conservancies under WWCA are at the early growth stage with the operational conservancies being privately owned, which enables greater flexibility in management strategies to achieve financial sustainability and ensure operational viability.

Specific Recommendations for Western Kenya:

- Restricted small grants for western Kenya as the most biodiverse part of the country.
- A tailored approach for the preservation of biodiversity within agricultural landscapes with an emphasis on agroforestry to promote environmental, economic and social benefits.

Status of Conservancies	Number
Mature	0
Operational	6
Emerging	0
Proposed	31
Uncertain	12
Dormant	2
Total	51

Table 25. WWCA number of conservancies and area size.

	Description	Organisation(s)	Scale	Conservancies	Private Sector - Tourism	Private Sector - Carbon	Private Sector - Livestock	Households	Debt	Asset-based finance	Equity	Grant	Micro-finance	Stage of Development
African Conservanices Fund	The aim of the African Conservancies Fund (ACF) is to strengthen, restore, and expand conservation areas to safeguard biodiversity, deliver revenues to communities, and combat climate change through adaptation and mitigation.	Conservation International	Regional	✓					✓					Active
Conservation International Ventures	Since 2018, CI Ventures has invested in early-stage SMEs in sub-Saharan Africa (Kenya and South Africa), supporting them through to bankability in the wider market. In this way, overlooked businesses and value chains involved in restoration of landscapes.	Conservation International	Global	✓	✓	✓	✓		✓		✓			Active
Conservancies Small Grants	Kenya Conservancies Fund (KCF) is being established to empower and support emerging conservancies in Kenya. The KCF aims to provide sustainable, accessible grant funding to new and needy conservancies, facilitating local decision-making and direct engagement. The Fund will offer long-term financial stability, proactive conservation strategies, and transparent governance. It will address biodiversity conservation, poverty alleviation, climate change adaptation, and gender and youth inclusion. The KCF will foster trust, mitigate financial risks, and serve as a catalyst for growth, ensuring that conservancies can undertake impactful, long-term projects.	KWCA	National	✓								✓		Developing
Tunza	The Tunza Fund is an impact-first, innovative, concessional,and evergreen debt facility catalyzing sustainable, climate-resilient land management in and around African conservancies. Looking to raise USD10m in blended capital and deploy USD17m over the next 10 years to conserve 100,000 ha of land, sequester 5m tCo2e of carbon and generate in excess of USD70m in economic value for local communities and landowners.	Conservation International, Platcorp Foundation, Conservation Capital & Sustain ES	National	✓	✓	✓	✓	✓	✓	✓		✓	✓	Developing

	Description	Organisation(s)	Scale	Conservancies	Private Sector - Tourism	Private Sector - Carbon	Private Sector - Livestock	Households	Debt	Asset-based finance	Equity	Grant	Micro-finance	Stage of Development
NRT Conservancy Livelihood Fund	The Community Livelihoods Fund (CLF), an initiative of the Northern Rangelands Trust (NRT), was established in 2015 to directly benefit conservancy members in Northern and Coastal Kenya. With a progressive funding model, the CLF has invested USD4.2m in 162 projects, leveraging USD190k in match-funding, benefiting 75,702 individuals across all member conservancies, with a significant focus on education, vocational training and financial inclusion, among other areas.	NRT	Land scape					✓				✓		Active
Africa Conservation & Communities Tourism (ACCT) Fund	ThirdWay Partners (TWP), an impact investment & advisory bank, and The Nature Conservancy (TNC), the world's largest conservation NGO, have launched the Africa Conservation & Communities Tourism (ACCT) Fund, which seeks to provide impact-oriented loans to tourism companies that are fundamental to community livelihoods and wildlife conservation in Sub-Saharan Africa.	TNC, Thirdways	Regional		✓				✓					Active
AgriFI Kenya Challenge Fund	The Fund's specific objective is to integrate 100,000 smallholder farmers/pastoralists in sustainable value chains.	KWCA	National				✓					✓		Active
Africa Forest Carbon Catalyst	The Africa Forest Carbon Catalyst was developed by The Nature Conservancy (TNC), to catalyze an increase in private sector financing for forest conservation projects in Africa, with an aim to stem deforestation and support reforestation in cooperation with local communities.	TNC	Global									✓		Active
Mastercard Foundation Fund for Resilience and Prosperity	The Mastercard Foundation Fund for Resilience and Prosperity is a seven-year initiative with a budget of USD126 million. It is designed to support Small and Medium-sized Enterprises (SMEs) operating in agriculture, climate adaptation, and the digital economy sectors across 20 countries in Sub-Saharan Africa.	Mastercard Foundation	Global				✓					✓		Active

	Description	Organisation(s)	Scale	Conservancies	Private Sector - Tourism	Private Sector - Carbon	Private Sector - Livestock	Households	Debt	Asset-based finance	Equity	Grant	Micro-finance	Stage of Development
Okavango Capital Partners	Okavango Capital Partners is a commercial investment firm focused on reducing climate risks and biodiversity loss in Africa's important ecosystems by working closely with and promoting the well being of local communities.	Okavango Capital Partners	Land scape		✓						✓			Active
Kenya Development Corporation	Kenya Development Corporation Ltd (KDC) is a Development Finance Institution which was established in 2020 to merge the operations of Industrial and Commercial Development Corporation (ICDC), Tourism Finance Corporation (TFC) and IDB Capital Limited. KDC is mandated to play a catalytic role in Kenya's socio-economic development by providing long-term financing and other financial, investment and business advisory services	KDC	Regional		✓				✓	✓	✓			Active
GEF Small Grants Programme	The GEF Small Grants Programme, part of the Global Environment Facility (GEF), supports local civil society and community-based initiatives addressing global environmental issues, enhancing livelihoods, and reducing poverty. Established in 1992, the programme collaborates with 136 countries, empowering communities, including indigenous people and marginalised groups with grants up to USD50,000. The programme, managed by UNDP on behalf of GEF, has disbursed over USD724.91 million to 26,429 projects	GEF	National		✓							✓		Active
Fund For Nature	The Fund for Nature's mission is to scale investment into nature-based solutions in emerging and frontier markets. The Fund will provide up-front finance for nature-based carbon projects to meet the needs of global buyers while ensuring equitable outcomes and a level playing field for local communities and other stakeholders.	Cross Boundary	Global				✓		✓		✓			Developing

Table 26. Established financing mechanisms available to conservancies, the private sector, and households distinguished by finance type and stage of development.

4.4. Policy Levers

We have identified three main policy levers to produce a conducive environment in which conservancies flourish. These include biodiversity fiscal incentives, actions surrounding government prioritization, and investments in conservation-compatible revenue streams.

4.4.1. (PL1) Biodiversity Fiscal Incentives

We propose introducing tax incentives for conservation contributions in Kenya, which could encourage individuals and corporations to participate actively in conservation efforts, potentially bringing extensive areas of land under the conservation system and preserving critical habitats.

Other jurisdictions have innovative approaches to lowering barriers to engage in conservation. For instance, when they restrict land uses to those that benefit nature, landowners in the USA receive up to 50% deductions on profit in a year (or 100% for farmers/ranchers). Unused deductions can be carried forward for up to 15 years, incentivizing ongoing conservation efforts.

Other countries like South Africa have developed their own innovative approaches to promote natural resource management for economic sustainability and biodiversity conservation. For instance, they provide biodiversity tax incentives to landowners who manage their land for conservation (as a nature reserve or national park). They can deduct the value of their land (4% straight-line deduction on the land's value from the taxpayer's taxable income each year for 25 years) from their taxable income. This helps to offset management costs and economic restrictions, ensuring continued investment in land management essential for economic growth and biodiversity conservation.

Introducing tax incentives for conservation contributions in Kenya could encourage individuals and corporations to participate actively in conservation efforts, potentially bringing extensive areas of land under the conservation system and preserving critical habitats.

Incentivizing Contributions to Conservation

- Allow zero rate tax, including VAT, on conservation fees, when they are clearly reinvested into conservation interventions.
- Tax exemption of the 2% stamp duty on land lease registration for wildlife conservation.
- Allow tax-deductible donations to conservation and conservation easements from Kenyan individuals and companies.
- Tax exemption on land rates to landowners when land is specifically set aside for conservation as the main land use.
- Tax exemption on the 5% capital gains tax when land is specifically purchased and subsequently set aside for conservation as the main land use.
- Tax exemption on capital goods used in conservation, including duty exemptions for conservation-related imports, such as protection vehicles.

4.4.2. (PL2) Government Prioritisation

We advise introducing broader policy initiatives to strengthen ecosystem management and conservation efforts in conservancies across Kenya. Government prioritization may be categorized by actions surrounding land registration, county government support, and budgetary allocations.

Land Registration

The Ministry of Lands should fast-track the implementation of the Community Land Act by issuance of certificates of title on community land with biodiversity. Secure land tenure ensures clear legal standing and management responsibility for communities, allowing them to effectively manage and protect their land resources while benefiting from them sustainably.

County Government Support

There exists a need to develop county-level bills that promote local conservancy models, ensuring these align with national legislation. Accordingly, clear roles and responsibilities for the management of national reserves at the county level need to be delineated, ensure that county spatial plans align with ecosystem plans and effectively integrate with national planning efforts. County plans should outline strategies for managing natural resources sustainably, conserving biodiversity, and supporting economic development in a way that is ecologically sensitive.

Budgetary Allocations

We recommend increasing annual budgetary allocations to funds which are critical to successful conservation efforts, including to the National Environment Trust Fund, the Water Sector Trust Fund, and others, to at least KES 1 billion, from the FY 2025/2026. The Wildlife Conservation Trust Fund in particular, should receive an increase of initial capital from KES 200 million to 5 billion, and help to catalyze new conservancies. Additionally, annual budgetary allocations to state agencies responsible for environment and natural resource management, including tourism, wildlife, environment, forestry, and arid and semi-arid lands should be increased by at least 30%.

It is recommended that financial support be increased for Kenya's National Wildlife Coexistence Strategy and Action Plan 2024-2033, including a sufficient budget for the Conservation Compensation Fund. Likewise, we support increased financial support to the Kenya Wildlife Service, and in particular the Community Wildlife Service who play a critical role in ensuring the success of conservation efforts in community and private lands.

Establishment of Ecosystem Plans

Develop and gazette comprehensive management plans for Kenya's over 40 distinct ecosystems. Align these plans with county spatial plans to harmonize regional conservation with local development goals.

Specific Actions:

A. Formulate ecosystem plans detailing resource management, sustainable use practices, and conservation priorities.
B. Integrate ecosystem plans with existing and future county spatial plans for a cohesive strategy which supports ecological sustainability and economic development.
C. Facilitate cross-sector collaboration to align these plans with national conservation strategies and international commitments.
D. Align infrastructure development with national spatial planning data. This alignment is vital to integrate conservation goals with public infrastructure projects, ensuring that development initiatives support and do not hinder conservation efforts.
E. Government to leverage vast areas of public land such as Galana Ranch (an agricultural and livestock farming area managed by the Agricultural Development Corporation (ADC)) and the Sheep and Goat Land near Nairobi National Park (owned and managed by the Kenya Agricultural and Livestock Research Organization (KALRO)) and incorporate the conversion of this land into conservancies or an extension of protected areas as part of the ecosystem plan for that area.

4.4.3. (PL3) Investments in Conservation-Compatible Revenue Streams

We propose fostering an environment of diversified revenue streams that support conservation efforts, with a focus on tourism, livestock, and carbon credits within conservancies. We provide evidence-informed strategies to improve these conservation-compatible revenue streams.

Investments in Conservation-Compatible Revenue Streams

Tourism

- Increase support to the Kenya Tourism Board.
- Strengthen Kenya Civil Aviation Authority and Kenya Airports Authority.Improve infrastructure to key tourism destinations.
- Improve security in volatile areas (i.e. north and northeast).

Carbon

- Improve security in volatile areas that have the potential to earn carbon credits.
- Streamline regulations for carbon credit projects to facilitate easier registration and management.
- Include beneficial sharing models that favour land-based investments and community development agreements.

Livestock

- Support county governments to ensure land use planning is aligned to ecosystem functions and planning.
- Improving security in volatile areas where livestock are central to the local economy.
- Improving access to financial markets that will support sector growth.

4.4.4. (PL4) Changes to Policy and Legislation

Below we list proposed amendments to existing legislation in order to enhance wildlife conservation, ensure equitable resource sharing, and promote sustainable economic benefits for communities involved in conservancies.

Wildlife Conservation and Management (Amendment) Bill No.3 of 2023

- Redefine wildlife conservancy to reflect that it is dedicated land for conservation which integrates other compatible land uses.
- Streamline and fast track the requirements for conservancy registration with a relevant government entity.
- Clarify how communities and landowners can access wildlife user rights, including which species qualify for wildlife ranching; how to engage in live trade and translocation, particularly when local carrying capacity has been exceeded; and permitting bird shooting where appropriate.
- Clarify definitions and regulations around user rights for biodiversity credits to facilitate their use as a viable economic tool for conservation efforts, ensuring that such mechanisms are clearly understood and effectively managed.
- Allow for the co-management of public lands between government and communities, including marine conservation areas or other public land that is viable for conservation but not designated as national parks or national reserves.
- Include marine species in the Wildlife Act to ensure compensation for communities affected by human-wildlife conflict involving these species.

Changes to Policy and Legislation

Draft National Green Fiscal Incentives Policy Framework

Integrate wildlife conservation into national fiscal policies to promote regenerative practices and enhance the resilience of savannah and rangeland ecosystems.

Climate Change (Amendment) Act 2023

Establish a legislative framework for carbon markets that includes a beneficial sharing model favouring land-based investments and community development agreements.

Carbon Markets Draft Regulations 2023

Ensure alignment with international standards, reduce bureaucratic overheads, clarify benefit-sharing and streamline registration processes.Standards on Conservancies by the Tourism Regulatory AuthorityRemove standards that are misaligned with the Wildlife Act, advocating for conservancies' autonomy under the Community Land Act 2016.

Human-Wildlife Conflict (HWC) Strategy

Government investment in the conservancy model to mitigate HWC, improved management of parks and reserves to contain wildlife and operationalization of a compensation insurance scheme.

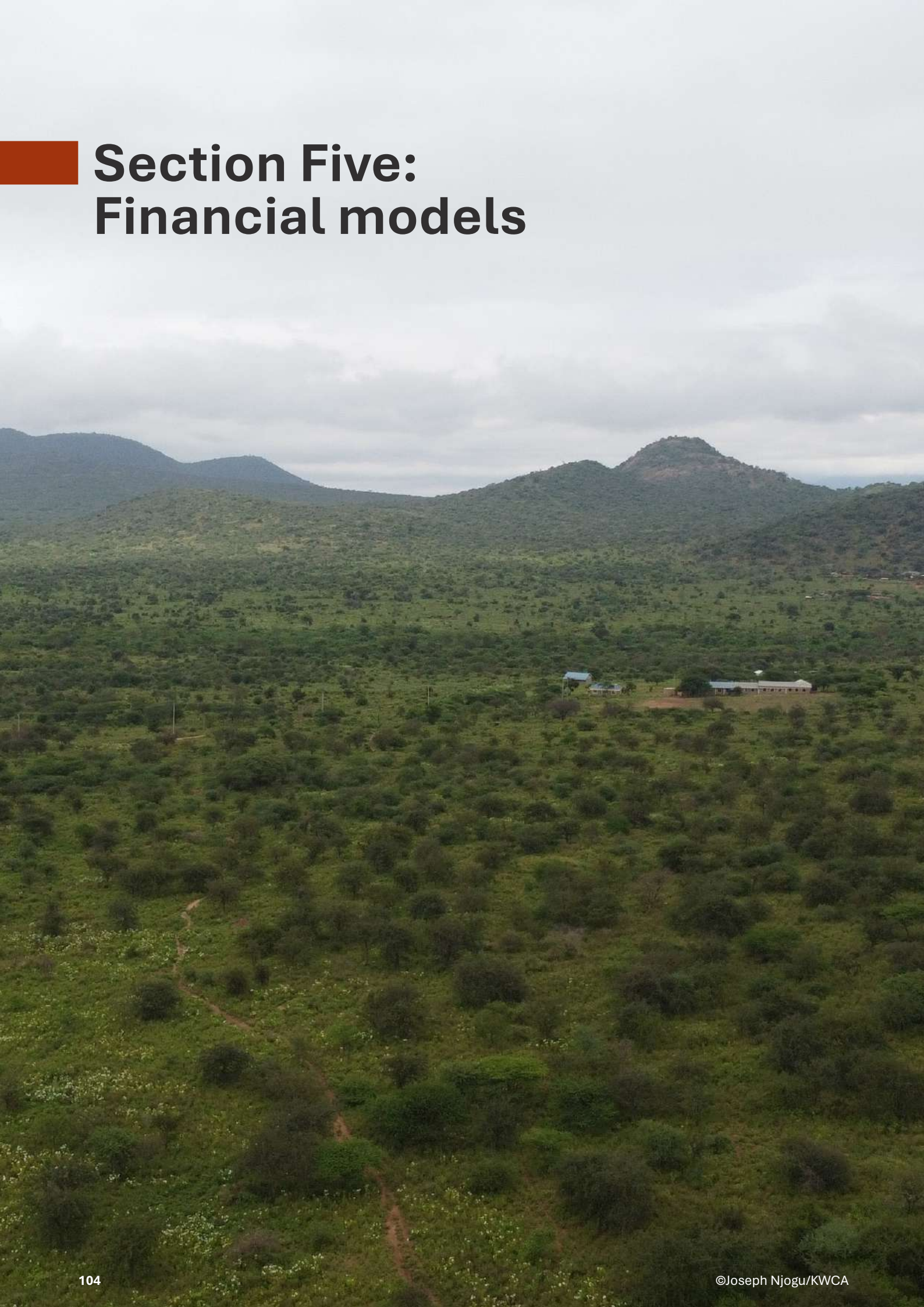
Human-Wildlife Conflict Inquiry

Prioritize long-term human-wildlife conflict mitigation over compensation, a significant increase in initial capital for the Wildlife Conservation Trust Fund, legislation to decentralize wildlife management, and fast-tracking ecosystem plans.

Wildlife Data Sharing Guidelines

Propose regulations rather than guidelines to incentivize more comprehensive and cooperative research and data sharing among conservancies.

Section Five: Financial models



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5.1 Conservancy Development Costs

To understand the cost associated with creating a durably finance, permanent conservancy, an archetype of conservancy development over 15 years has been developed. This highlights the differences in costs between different types of conservancies, and the changes in the annual costs over time, and the shi.

This data was compiled from deep-dive interviews, audited statements, and baseline data.

We aim to understand the potential short- and long-term revenue drivers at the site-level for conservancies, as to examine whether these revenue streams can cover:

- **“Good Scenario” - minimum management costs.** Core annual management and one-off establishment costs and opportunity costs incurred by the conservancy.
- **“Intermediate Scenario” - improved management and long-term sustainable costs.** Annual high-level management costs and opportunity costs incurred by households and one-off establishment costs incurred by the conservancy.
- **“Optimal Scenario ‘’ - optimal sustainable costs for running the highest spending conservancies.** Management costs, opportunity and transaction costs all covered, and contribute towards sustainable development objectives of conservancy stakeholder and one-off establishment costs incurred by the conservancy.

The calculations have been split into “One-off costs” and “Annual operation costs”.

5.1.1 One-Off Costs

One-off costs:

- These are activity or programmatically based to spur on a conservancies growth and occur independent of operating costs.
- This includes a variety of activities documented in the table below, and vary from conservancy status to conservancy status.
- Full costing was estimated from deep-dives, baseline data, and key informant interviews.

Category	Conservancy Status		
	Proposed	Emerging	Operational
Governance	Monthly Meeting Sectional Meetings (Barazas) All members meetings Develop articles and register a legal entity Learning visits Develop a list of registered members	Board training Bi-annual Board meetings Bi-annual Committee meetings Management training Quarterly community meetings (to get consensus or progress report)	
Baseline and Mapping	Boundary and parcel mapping Conservancy signage Mapping of natural resources and attractions Biodiversity assessment		
Lease	Lease agreements development, search, legal	Lease agreement: land board consent, registrations, search, legal fees, stamp duty.	
Finance & Admin	Bank account opening Obtain KRA Pin	Financial so Investor legal preparation costs. Recruitment of staff HR policy development	
Registrations	Register with KWS (renewal every 10 years)	Membership with KWCA Annual fee to KWCA Membership with a regional association Apply for a game ranch licence. Register community land Community meetings during the transition	
Rangers		Rangers uniform, Ranger training , Radio communication Purchase of GPS and training	Ranger training on SMART/Earth Ranger etc M&E planning and training
Infrastructure and Assets	Office Motorbike	Entry gate barriers Ranger base Vehicle (car)	Roads, Borehole, Dams Office, Vehicles Motorbikes, Airstrip
Planning and Implementat ion		Grazing plan Management plan Training on how to develop a business plan	Development of an SPV/ management vehicle Business plan (could be part of conservancy strategic plan)
Social Media/Marketing		Website development Social media plan/ marketing materials (basic)	Marketing and communications

Table 27: The activities funded under our "one-off costs" that allow a conservancy to grow from proposed to emerging to operational to mature, and ultimately become self-financed.

5.1.2 Annual Conservancy Costs

The annual running costs for a conservancy encompass various expenses of a conservancy, collected from the baseline, deep-dives and audited accounts (~40 conservancies).

Annual operating costs:

Management Costs:

- Including IT and software expenses, professional fees, and compensation for different staff roles such as rangers, herders, community liaison assistants, CEO, senior managers, CFO, community development personnel, and marketing and tourism managers.
- Additionally, there are costs related to WIBA, EL, staff medical expenses, uniforms, meals and rations, accommodation, casual wages, and overall staff welfare.
- Operational expenses cover vehicle running and road maintenance.

Opportunity Costs:

- For Group conservancies this includes leases.
- For Community and Private conservancies this largely includes community development projects driven by the conservancy.

Additional development costs beyond the scope of benefit sharing from the conservancy where not included.

5.1.3 Archetype of Conservancy Development

Using the "One-off" and "Annual Conservancy Costs'', we created a development trajectory to calculate 30x30 costs for conservancies and to create REDI conservancies. This can be used to estimate the financial requirements for both the Financial Mechanisms and Technical Assistance Levers to successfully implement this development.

This archetype was used to estimate the costs for conservancies to follow this archetype. For example, by Year 3 in the financial model all Proposed conservancies become Emerging conservancies. The One-off costs are applied to each conservancy on transition between growth strategies:

- Proposed
- Emerging
- Early Operational
- Mature Operational (no one-off costs are assumed for a mature conservancy in this model. This is unlikely, as mature conservancies innovate and increase their CAPEX budgets, however, this value is difficult to estimate and is not recurred in the scope of the 30x30).

The annual recurring costs are applied to each year a conservancy is found without that growth stage and are calculated by using the area of the conservancy.

All financial figures subsequently presented in this document are expressed in United States Dollars (USD) and are nominal values. This means that these figures have not been adjusted for inflation and represent the current dollar values without accounting for changes in purchasing power over time.

Year			Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	Y12	Y13	Y14	Y15
Status			Proposed			Emerging				Early Operational					Mature		
One-off costs (USD)	Group	$490,000		$81,000			$145,000					$264,000					
	Private	$416,000		$30,000			$122,000					$264,000					
	Community	$476,000		$63,000			$149,000					$264,000					
	Average	$461,000		$58,000			$139,000					$264,000					
Good Operating Costs (USD/ha)	Group	$354				$13	$13	$13	$13	$18	$18	$18	$18	$18	$71	$71	$71
	Private	$713				$9	$9	$9	$9	$75	$75	$75	$75	$75	$102	$102	$102
	Community	$49				$1	$1	$1	$1	$4	$4	$4	$4	$4	$9	$9	$9
	Average	*$372*				***$8***	***$8***	***$8***	***$8***	***$32***	***$32***	***$32***	***$32***	***$32***	***$60***	***$60***	***$60***
Intermediate Operating Costs (USD/ha)	Group	$611				$21	$21	$21	$21	$52	$52	$52	$52	$52	$89	$89	$89
	Private	$810				$9	$9	$9	$9	$88	$88	$88	$88	$88	$110	$110	$110
	Community	$125				$8	$8	$8	$8	$8	$8	$8	$8	$8	$16	$16	$16
	Average	*$516*				***$13***	***$13***	***$13***	***$13***	***$50***	***$50***	***$50***	***$50***	***$50***	***$72***	***$72***	***$72***
Optimal Operating Costs (USD/ha)	Group	$828				$30	$30	$30	$30	$81	$81	$81	$81	$81	$101	$101	$101
	Private	$859				$10	$10	$10	$10	$92	$92	$92	$92	$92	$120	$120	$120
	Community	$227				$13	$13	$13	$13	$21	$21	$21	$21	$21	$24	$24	$24
	Average	*$638*				***$17***	***$17***	***$17***	***$17***	***$65***	***$65***	***$65***	***$65***	***$65***	***$82***	***$82***	***$82***
Funding Source (%)	Donor			100%		100%	100%	100%	100%	90%	70%	50%	30%	10%	10%	5%	0%
	Self-Funded			0.00%		0%	0%	0%	0%	10%	30%	50%	70%	90%	90%	95%	100%

Table 28. Archetype of Conservancy Development

- "Optimal Operating Costs (USD/ha)": Calculated using the 90th percentile of costs for conservancies in this category.
- "Intermediate Operating Costs (USD/ha)": Calculated using the 85th percentile of costs for conservancies in this category.
- "Good Operating Costs (USD/ha)": Calculated using the 75th percentile of costs for conservancies in this category

5.2. What would 30x30 cost?

5.2.1 Average Development Costs

Over a conservancy's 15-year development trajectory, from proposed to mature, an average of USD 1,000,000 to USD 10,000,000 of funding support is required, depending on a conservancy's size and type, and the scenario of operational costs. Larger conservancies may need even more funding than this.

By year 15 the conservancy is expected to be adequately self-funded from a range of revenue sources (see below).

Good Scenario		Operational Costs			
	Average Size (ha)[24]	One-Off Costs	Donor	Self-Funded	15-Year Total Support
Group	8000	$490,000.00	$865,984	$1,966,973	$1,355,984
Private	7700	$416,000.00	$1,818,020	$3,670,110	$2,234,020
Community	91000	$476,000.00	$1,418,066	$3,019,136	$1,894,066
Intermediate Scenario		Operational Costs			
	Average Size (ha)	One-Off Costs	Donor	Self-Funded	15-Year Total Support
Group	8000	$490,000.00	$1,815,670	$3,076,187	$2,305,670
Private	7700	$416,000.00	$2,119,397	$4,120,666	$2,535,397
Community	91000	$476,000.00	$5,196,714	$6,156,308	$5,672,714
Optimal Scenario		Operational Costs			
	Average Size (ha)	One-Off Costs	Donor	Self-Funded	15-Year Total Support
Group	8000	$490,000.00	$2,700,012	$3,920,443	$3,190,012
Private	7700	$416,000.00	$2,211,182	$4,404,400	$2,627,182
Community	91000	$476,000.00	$9,727,069	$10,944,136	$10,203,069

Table 29. Cost for a 15-year lifetime for an average-size conservancy development.

24 Note: Average conservancy size from KWCA spatial database rounded to the nearest hundred.

5.2.2 Costing Conservancy Development

Below, we provide results from using two scenarios, the good and the intermediate scenarios. Both assume:

- All conservancies become fully self-financed in the next 15 years.
- Any uncertain status conservancies are excluded.
- All conservancies follow the typology listed above, e.g by Year 3 all proposed conservancies become Emerging.
- One-off costs are unit based (1 per conservancy).
- Recurring operational costs are scaled by area.
- All numbers are nominal.
- Operational and mature conservancies are considered effectively managed under a 30x30 definition.

Over the course of 15 years, all conservancies become self-financed, and by Y8 30x30 is achieved with 8,124,543 hectares of land under operational conservancies and 5,067,290 hectares under mature conservancies. This is a total of 22.73% of Kenya's land area under effective conservancies, with a total of 32.73%of Kenya conserved when government national parks, reserves and forests are considered.

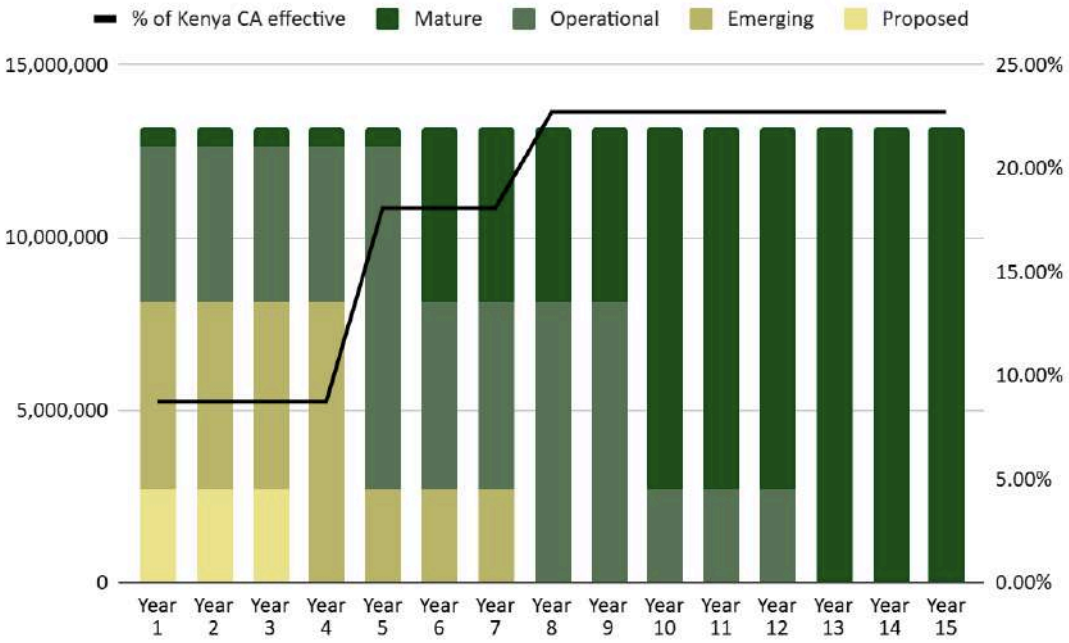

Figure 24: The area of conservancies (hectares; left-axis and percent of Kenya covered (right-axis) under our 30x30, 15-year development model.

In addition, "one-off costs'' do not vary between the good and optimal scenarios. The total costs are USD 88M, largely needed in the next 5-8 years **(USD 69M)**, with the following split:

Proposed	**$4,401,000**
Emerging	**$21,185,000**
Operational	**$63,096,000**

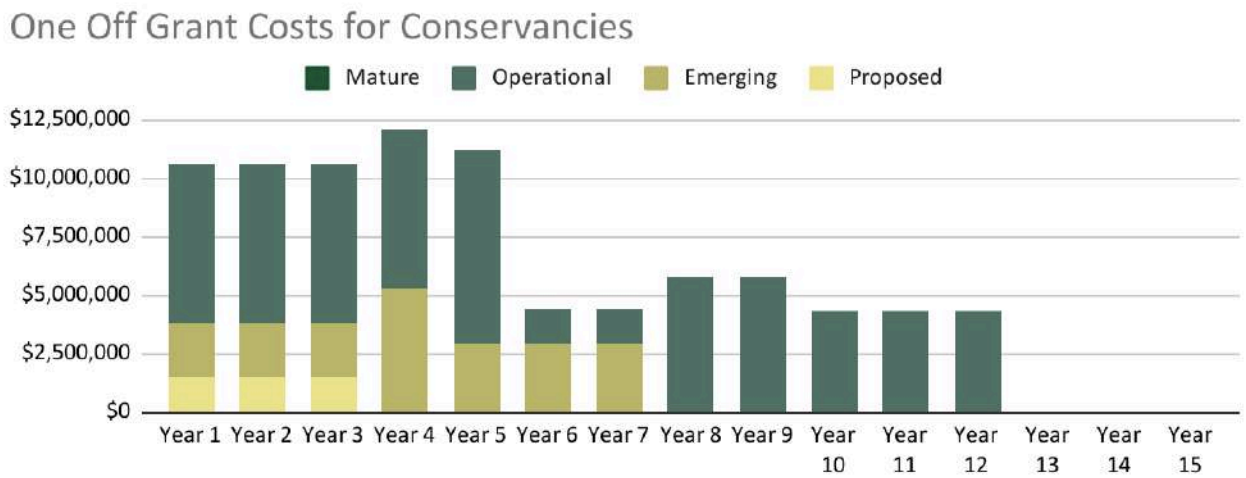

Figure 25. One-off costs under our 30x30, 15-year development model.

5.2.2.1 Good Scenario

In the "Good" scenario, which has the lowest annual operational costs, the following happens:

- The total conservancy annual operational budgets increase to **USD 204 million** by Year 13.
- This is assumed to be 100% self-funded.
- In Y1 we expect an increase in annual donor funding to conservancy operations of USD 46M, assuming the current funding base of USD 40M stays consistent.
- By Y11 this had decreased to just USD 6m per year.
- Over 15 years we expect:
  - Total conservancy expenditure of **USD 2,228,362,580**
  - Total donor expenditure of **USD 269,798,991**
  - Total private sector and endowment funding of **USD 1,958,563,589.**
  - If 65% of this goes to communities either directly or indirectly thiswould equate to USD 780M total community benefits, and USD 71M per year by Y15.

Figure 26: Conservancy operational costs under our 30x30, 15-year development model, for the "Good" scenario.

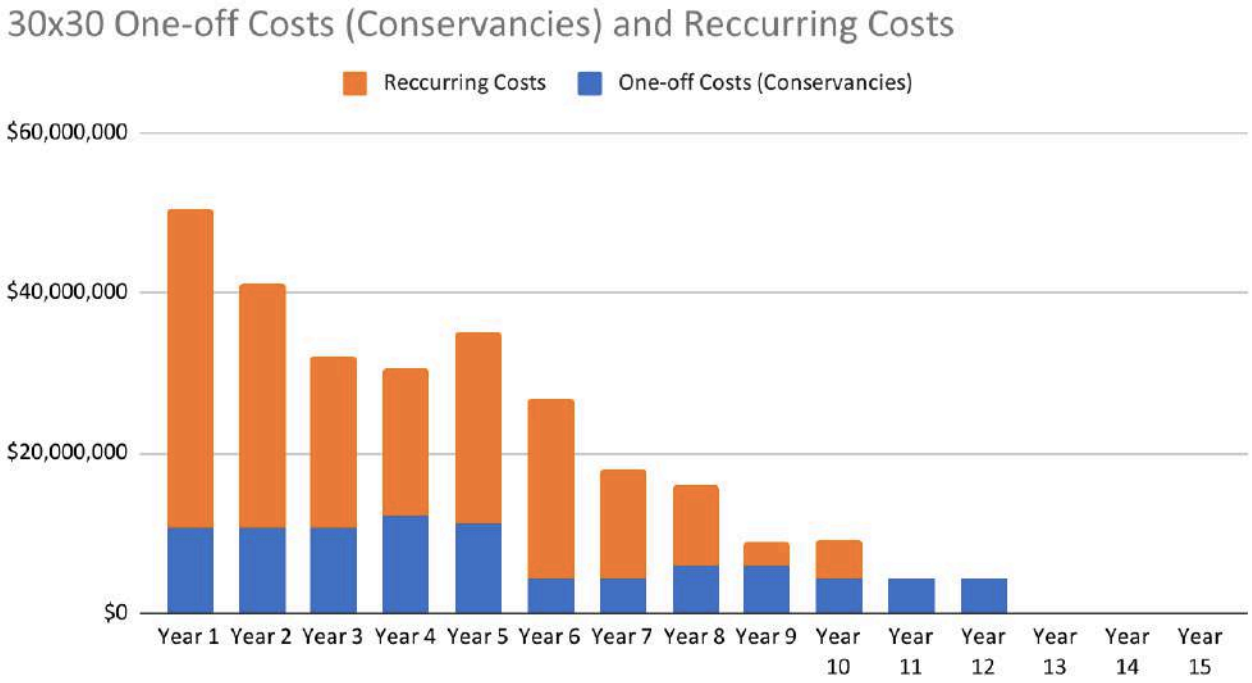

Figure 27: The total direct funding needed to support conservancies to achieve 30x30 under the good scenario.

Assuming that there is already a base donor expenditure of **USD 7M** per year[25], we expect that the total amount of grant funding to conservancies to achieve 30x30 will be **USD 277m**, with most of the funding loading in Y1-Y5, to create financially viable conservancies.

Assuming that all currently mature conservancies are self-financed, high level estimates of the how to create a self-financing model, based on our key drivers identified in the situational analysis include[26]:

- **Tourism: 25 From baseline data.**
  - The creation of mid to high-level wildlife and landscape focused eco-tourism offerings.
  - **USD 81M** generated per year from tourism investments by Y15.
  - An additional 93 tourism facilities, totalling >3700 beds.[27]
  - If many of the current tourism facilities have a reformation of their conservation fee structure this could be drastically reduced to 50 new lodges.
- **Tourism (Early Stage) [28]:**
  - The creation of a domestic market with campsites and small lodges.
  - **USD 4.4M** generated per year from early-stage tourism investments by Y15.
- **Carbon Credits (Rangelands) [29]:**
  - Grassland carbon credit projects, using rotational grazing methods to restore rangelands and reduce degradation.
  - **11.2M** hectares of new rangeland carbon projects
  - **95M** tonnes of C02 sequestered over 15 years, contributing to more than 2/3rds of Kenya's NDCs. [30]
  - **USD 420M** net revenue to conservancies over 15 years.
  - **USD 37M** net revenue to conservancies o per year by Y15.
- **Livestock (Beef)[31]:**
  - The creation of commercial herds in nature conservancies and sale into the beef market at a small scale.
  - By Year 15 this would include 1.3 million ha of conservancies with a commercial beef herd, generating **USD 13M** per year.
  - Conservancies manage 132,000 head of cattle.
- **Endowment/Long-term Financing:**
  - Conservancies will also require long-term support if they cannot create their own revenue streams.
  - An endowment generation **USD 19M** per year will be required to fill the deficit.

These numbers are early stage estimates. They are not generated on a conservancy by conservancy basis. Some conservancies may generate revenue that vastly exceeds what is required for a "Good" operational costs, and some may generate very little revenue. It is likely then that the estimated size of the Endowment and Tourism Facilities is lower than what might be required to achieve 30x30. Further modelling is needed.

26 All revenue sources exclude 39 currently mature conservancies with revenue around USD 45 M.
27 Tourism: Assume 70% of all financing gap, USD 150 conservation fee per night, 40 beds, 40% occupancy.
28 Tourism (Early Stage): 1 small investment generating USD 30,000 per year for emerging conservancies.
29 Carbon: Grassland sequestration only across operational and mature conservancies, 0.75 tco2e/ha, USD 7.5/tonne, 60% reaches conservancy excluding costs, leakage and buffer, and current projects.Assumes all new conservancies are degraded - which is likely.
30 To achieve a 32% reduction target by 2030, Kenya needs to reduce or sequester emissions by about 14.3 million tonnes of CO2 equivalent per year on average over the 10-year period from 2020 to 2030. This calculation is based on the overall target of 143 MtCO2e over the decade.
31 10% of all operational and mature conservancies. Assume a conservative profit of 10 USD/ha.

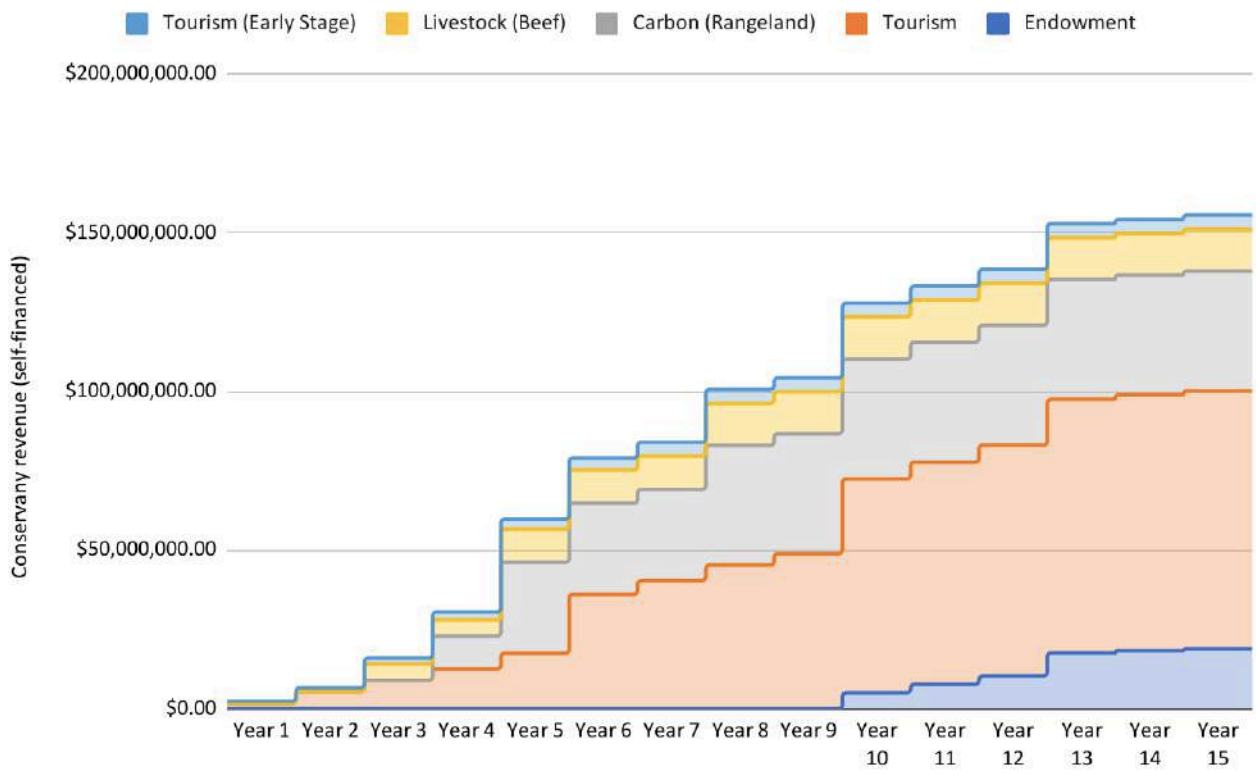

Figure 28. The estimated sources of self-generating finance needed to support conservancies to achieve 30x30 under the "Good scenario".

5.2.2.2 Intermediate Scenario

In the "Intermediate" scenario, which has the lowest annual operational costs, the following happens:

- The total conservancy annual operational budgets increase to **USD 313** million by Year 13.
- This is assumed to be 100% self-funded.
- In Y1 we expect an increase in annual donor funding to conservancy operations of **USD 111M**, assuming the current funding base of **USD 49M** stays consistent.
- By Y11 this had decreased to just USD13m per year.
- Over 15 years we expect:
  - Total conservancy expenditure of **USD 3,636,435,341**
  - Total donor expenditure of USD708,514,823
  - Total private sector and endowment funding of **USD 2,927,920,519**
  - If 65% of this goes to communities either directly or indirectly this would equate to **USD 1.27B** total community benefits, and **USD 109M** per year by Y15.

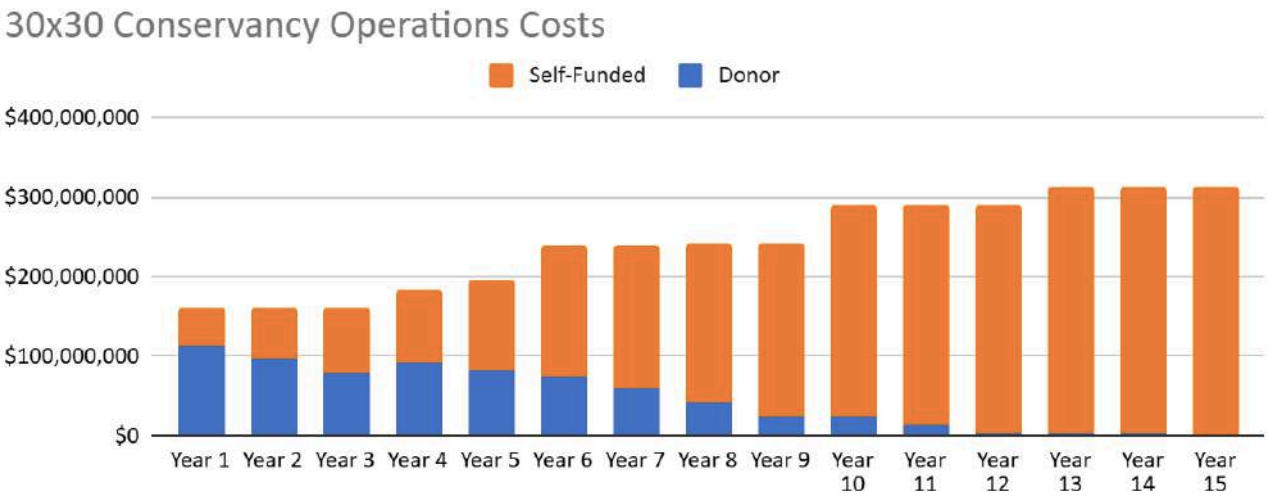

Figure 29: Conservancy operational costs under our 30x30, 15-year development model, for the “Intermediate” scenario.

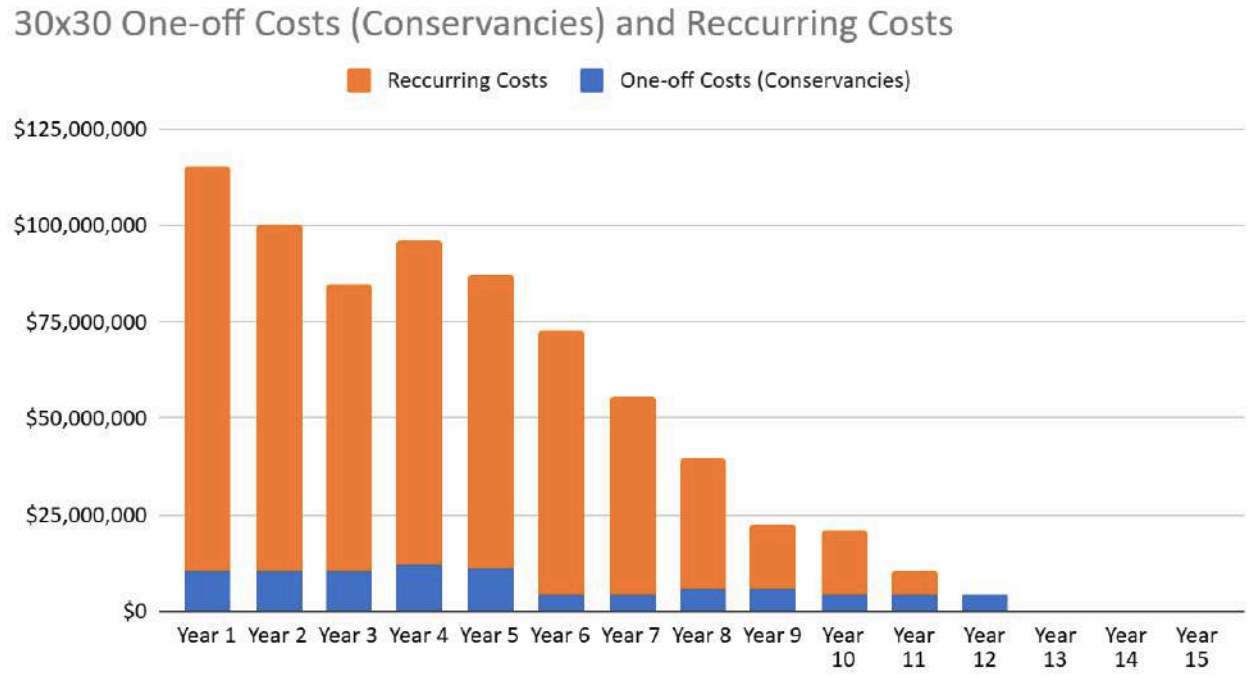

Figure 30. The total direct funding needed to support conservancies to achieve 30x30 under the “Intermediate scenario”

Assuming that there is already a base donor expenditure of **USD 7M** per year[32], we expect that the total amount of grant funding to conservancies to achieve 30x30 will be **USD 710M**, with most of the funding loading in Y1-Y5, to create financially viable conservancies.

Assuming that all currently mature conservancies are self-financed, high level estimates of the how to create a self-financing model, based on our key drivers identified in the situational analysis include[33]:

- Tourism:
  - The creation of mid to high-level wildlife and landscape focused eco-tourism offerings.
  - **USD 133M** generated per year from tourism investments by Y15
  - An additional 152 tourism facilities, totalling >6000 beds.[34]
  - If many of the current tourism facilities have a reformation of their conservation fee structure this could be drastically reduced to 75 new lodges.
- **Tourism (Early Stage):**[35]
  - The creation of a domestic market with campsites and small lodges.
  - **USD 4.4M** generated per year from early-stage tourism investments by Y15.
- **Carbon Credits (Rangelands):**[36]
  - Grassland carbon credit projects, using rotational grazing methods to restore rangelands and reduce degradation.
  - **11.2M** hectares of new rangeland carbon projects.
  - **95M** tonnes of C02 sequestered over 15 years, contributing to more than 2/3rds of Kenya's NDCs. [37]
  - **USD 420M** net revenue to conservancies over 15 years.
  - **USD 37M** net revenue to conservancies o per year by Y15.
  - Livestock (Beef)[38]:
  - The creation of commercial herds in mature conservancies and sale into the beef market at a small scale.
  - By Year 15 this would include 1.3 million ha of conservancies with a commercial beef herd, generating **USD 13M** per year.
  - Conservancies manage 132,000 head of cattle.
- **Endowment/Long-term Financing:**
  - Conservancies will also require long-term support if they cannot create their own revenue streams.
  - An endowment generation **USD 70M** per year will be required to fill the deficit.

32 From baseline data.
33 All revenue sources exclude 39 currently mature conservancies with revenue around USD 45M.
34 Tourism: Assume 70% of all financing gap, USD 150 conservation fee per night, 40 beds, 40% occupancy.
35 Tourism (Early Stage): 1 small investment generating USD 30,000 per year for emerging conservancies.
36 Carbon: Grassland sequestration only across operational and mature conservancies, 0.75 tco2e/ha, 7.5 USD/tonne, 60% reaches conservancy excluding costs, leakage and buffer, and current projects. Assumes all new conservancies are degraded - which is likely.
37 To achieve a 32% reduction target by 2030, Kenya needs to reduce or sequester emissions by about 14.3 million tonnes of CO2 equivalent per year on average over the 10-year period from 2020 to 2030. This calculation is based on the overall target of 143 MtCO2e over the decade.
38 10% of all operational and mature conservancies. Assume a conservative profit of 10 USD/ha.

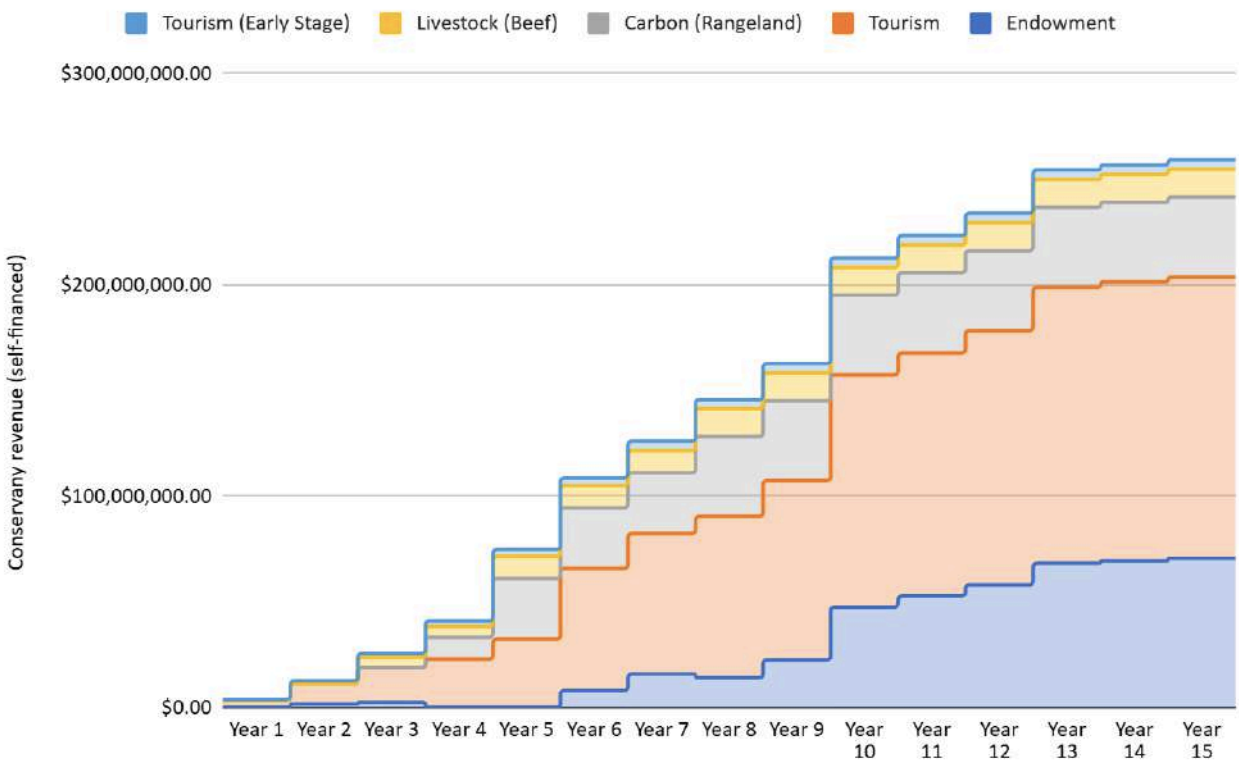

Figure 31. The estimated sources of self-generating finance needed to support conservancies to achieve 30x30 under the "Intermediate scenario".

5.3. How could funding be deployed to financing mechanisms to achieve 30x30?

5.3.1 Capitalization of 30x30 Financing Mechanisms

Innovative financing solutions must be explored to overcome the current funding challenges of short term, restricted funding, which inhibit a conservancy's growth potential.

This involves creating financing and technical assistance mechanisms that provide targeted support at each stage of conservancy development. Thereby actively addressing issues of social capital, governance, financial sustainability, and innovation. By understanding the unique needs of conservancies, we can work towards a future where all conservancies are durably financed and well-managed, contributing significantly to biodiversity conservation and sustainable community development. Below we provide estimates of early-stage and high-level, funding requirements for the following financial mechanisms under two scenarios:

- **Conservancy:**
  - Development and Leadership Grants
  - Small grants
  - Investment ready grants
  - Concessional debt
  - Long-term financing/ Endowment
- **Private Sector:**
  - Tourism Private sector starter grants
  - Tourism Concessional debt
  - Livestock Based Asset Finance
- **We provide no estimate for:**
  - Outcome-Based Payments for Rangeland/ Livestock Management
  - Carbon Catalyst
  - Microfinance
  - Livelihood Development Grants
  - Under the "Good Scenario":
- **USD 533,899,001** worth of grant capital is needed to be deployed.
- **USD 226,184,045** of leverage commercial or concessional capital in blended finance structures.
- Under the "Intermediate Scenario":
- **USD 1,605,863,176** worth of grant capital is needed to be deployed. This large increase is because of the vast increase of the endowment, and increased grant requirements to cover long-term recurring costs. The endowment could be as large as **USD 0.9 billion**.
- **USD 373,218,117** of leverage commercial of concessional capital in blended finance structures.

The immediate Financing Mechanisms that need capitalising regardless of structure or scenario are :

- Development and leadership grants
- Small grant
- Investment ready grants.

Due to the fact that these grant types will require a similar screening process, and a similar source of financing, these mechanisms can be coordinated under a single Fund, aiming to deploy somewhere between **USD 250M** and **USD 600M** over the next 8 years, with most of the funding deployed by Y5.

An initial raise is required to support Funds that provided capital to create revenue generating activities for conservancies, including tourism and livestock finance, however this deployment of capital will be more staggered. The largest deployment of tourism concessional finance will not be needed until Year 10, when a large number of conservancies should have improved their tourism product and management capabilities through long-term grant financing.

Deployment of capital from the Endowment to support conservatives can be delayed to Y10 in the "Good scenario". However, if conservancy costs are higher, such as in the "Intermediate scenario", Endowment based support for conservancies may be needed from Y6 onwards.

Financing Mechanism	Description	Good Scenario		Intermediate Scenario		Notes
		30x30 Grant [39]	Co-Financed [40]	30x30 Grant	Co-Financed	
(FM 1) Small Grants	Proposed and emerging conservancies need sufficient capital to build consensus, create institutions, support core operations, and cover basic CAPEX. Small grants enable the development of core functions in a conservancy regardless of private sector engagement or invest-ability.	$79,70 5,144		$307,40 2,193		All emerging one-off costs and running costs.
(FM 2) Development and Leadership Grants	Conservancy establishment is often driven by strong leaders, without any capital to support consensus building and early-stage conservancy development.	$4,40 1,000		$4,40 1,000		All proposed one-off costs.
(FM 3) Investment Ready Grants	Early growth conservancies lack the infrastructure, and management capacity to attract and professionally engage with the private sector. To minimize repayment and performance risk investment ready grants can provide funding to help conservancies get ready for private-sector investment.	$175,409,065		$285,464,833		70% operational running costs, all one-off costs operational.
(FM 4) Concessional Debt	Operational conservancies that may have been functioning for several years lack the infrastructure, and management capacity to increase prospects for large-scale private sector engagement. For conservancies that have strong cash flows and balance sheets this can provide funding to allow conservancies to grow and improve management effectiveness.[41]	$13,600,126	$40,800,379	$25,611,484	$76,834,451	30% operational running costs, all mature donor costs, assuming capital deployed in a structure with leveraged use of the PFP funds.
(FM 5) Long-Term Financing/ Endowment	Some conservancies have no short or long-term prospect of generating revenues via existing donors or private sector, yet may be of critical importance for biodiversity and communities.	$200,000,000		$900,000,000		Calculated at a 4.0% interest rate and deployed when needed.
(FM 6) Outcome Based Payments for Rangeland/ Livestock Management	Solutions are needed to incentivize livestock owners to implement grazing plans and focus on outcome-oriented targets, such as improvement in soil health, water, etc. No estimates provided.					

Table 30. Financing mechanisms and costs required under two different scenarios to achieve 30x30 conservancy development.

Financing Mechanism	Description	Good Scenario		Intermediate Scenario		Notes
		30x30 Grant [39]	Co-Financed [40]	30x30 Grant	Co-Financed	
(FM 7) Private Sector Starter Grants	In order to stimulate the local private sector market and to help catalyse investment into conservancies that are at earlier stages of growth, private sector grants could help draw new actors or support the conservancies into an area which may otherwise be deemed too risky.	$2,600,000		$2,600,000		Small ticket-size investment in emerging conservancies.
(FM 8) Concessional Debt for Tourism	Provide incentives for the private sector to develop medium-risk opportunities that are impact-first in both carbon and tourism sectors.	$31,800,000	$159,000,000	$54,000,000	$270,000,000	Total investment required for lodge investment, with x5 leverage of capital.
(FM 9) Carbon Catalyst	A Catalyst program would allow conservancies with developers to explore investment options, before graduating on to equity or debt based structures, which are wide-spread in the market. No estimates provided.					
(FM 10) Livestock Asset Finance	Livestock asset/stock finance provides farmers and ranchers with the necessary capital to purchase, manage, and grow their herds, leveraging the value of their livestock as collateral. This type of financing supports agricultural productivity and economic stability by enabling efficient and scalable livestock operations.	$26,383,666	$26,383,666	$26,383,666	$26,383,666	Assume 10 ha/head, and $400/head value. 2x leverage of 30x30 grant capital.
(FM 12) Livelihood Development Grants	Landowners and other conservancy-dependent/ adjacent communities need support to explore revenue generation and livelihood strategies not solely dependent on natural resources. Grants available to community proposals for group projects or potentially to individuals if a graduation approach is used.					

39 Assuming that this 30x30 contribution is mobilised grant capital from the PFP or other mechanisms.

40 This column represents the potential mobilised capital such as concessional or commercial debt.

41 The actual value of concessional debt that could be provided to conservancies is much higher. Mature conservancies, with sustainable revenue streams, would likely be able to absorb considerably more debt, both concessional and commercial.

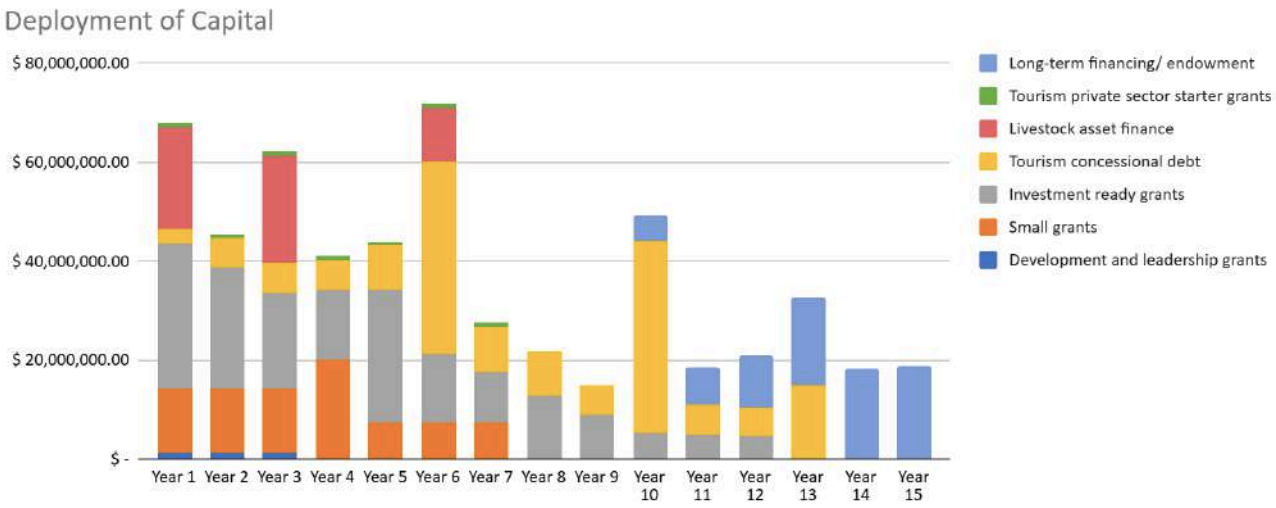

Figure 32. The estimated timeline of deployment of capital to achieve 30x30 under the "Good scenario".

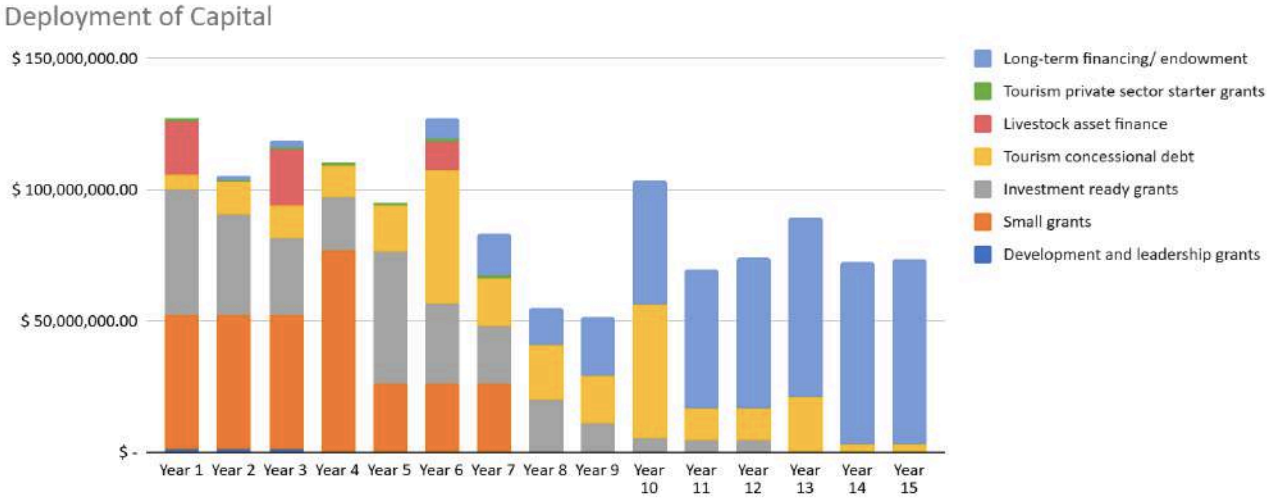

Figure 33: The estimated timeline of deployment of capital to achieve 30x30 under the "Intermediate scenario".

5.3.2 Support for 30x30 TA Levers

Of the TA levers provided in this document, the following need support:

- Landscape Association
- Kenya Wildlife Conservancies Association
- Conservancy Management Support
- Tourism Investment Forums
- Community Development Incubators
- Spatial Planning

The Kenya Wildlife Service and the Lands Office Improvements can be supported through Government Budget Prioritisation (PL2).

The total estimated budget is USD 141,750,000 over 15 years, or **USD 9,450,000** per year.

TA Lever	Role	Key Areas	PFP Priority	30x30 Grant Required	Notes
Landscape Association	The Landscape Association provides tailored support to conservancies.	TA: admin and finance, governance, management planning, strategy & leadership, business planning & growth, land tenure and legal, social and environmental impact.	**High**	$112,500,000	**15 LA (3 new), supported with USD500,000 for tailored activities per year for 15 years.**
Kenya Wildlife Conservancies Association	Landowner-led national membership organization to represent conservancies and direct policy and investment.	TA: support Landscape Associations. create enabling policies, secure investment for conservancies, represent conservancies.	**High**	$11,250,000	**$750,000 per year for 15 years.**
Conservancy Management Support	Establishing management partnerships (i.e. with NGOs).	TA: admin and finance, governance, management planning, strategy & leadership, business planning & growth, improved ranger/scout activities, land tenure and legal, social and environmental impact.	**High**	$6,000,000	**$400,000 per year for 15 years.**
Spatial Planning	Open & connected ecosystem-based conservation approach.	Support to conservancies, ecosystem planning processes, counties on spatial planning.	High	$3,000,000	**$200,000 per year for 15 years.**
Tourism Investment Forums	Linking tourism investors to conservancies.	Bridging gap between investors and conservancies.	High	$6,000,000.00	**$400,000 per year for 15 years.**
Community Development Incubators	Enabling community-led sustainable development initiatives.	Supporting household-led initiatives.	Mid	$3,000,000	**$200,000 per year for 15 years.**

Table 31. Support for 30X30 TA Levers

Conclusion: Investing in Our Future

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Ensuring conservancies are equitably governed, effectively managed, and durably financed will be the sole increased contribution to the protected area network in Kenya, covering vast parts of community and private lands, realizing social and ecological objectives.

To achieve 30x30, it is predicted that Kenya would need to raise:

- **USD 500 million** to **USD 1.5 billion** in grant capital to be deployed to conservancies, create an endowment fund, and to act as leverage for capital to create private sector investment into conservancies.
- **USD 141,750,000** to provide the technical assistance needed to create viable conservancies.
- In doing so, we could leverage **USD 225 to 375 million** in concessional or commercial capital against grant financing to support private sector investment to generate **USD 200-300 million** per year for conservation activities and community development in perpetuity.

This capital is front-loaded, but required over a period of 15 years to unlock the potential of conservancies in Kenya as to achieve Target 3 (30x30).

Realizing these goals relies on the effective implementation of customized financial support and technical assistance, catered to the unique circumstances and growth stages at which each conservancy resides. Innovative approaches and detailed mechanisms for financing solutions will be adopted, whilst taking into account social, economic, environmental, and legal considerations to align with 30X30 goals. Ensuring conservancies effectively contribute to 30x30 happens when the right technical assistance levers, finance mechanisms and policy levers are employed equitably and effectively.

This would create a long-term sustainable conservancy network across Kenya, covering over 15 million hectares of land, and generating **USD 200-300 million** per year for conservation activities and community development in perpetuity. This would unlock vast benefits for the people of Kenya, while contributing towards Kenya's national development agenda.

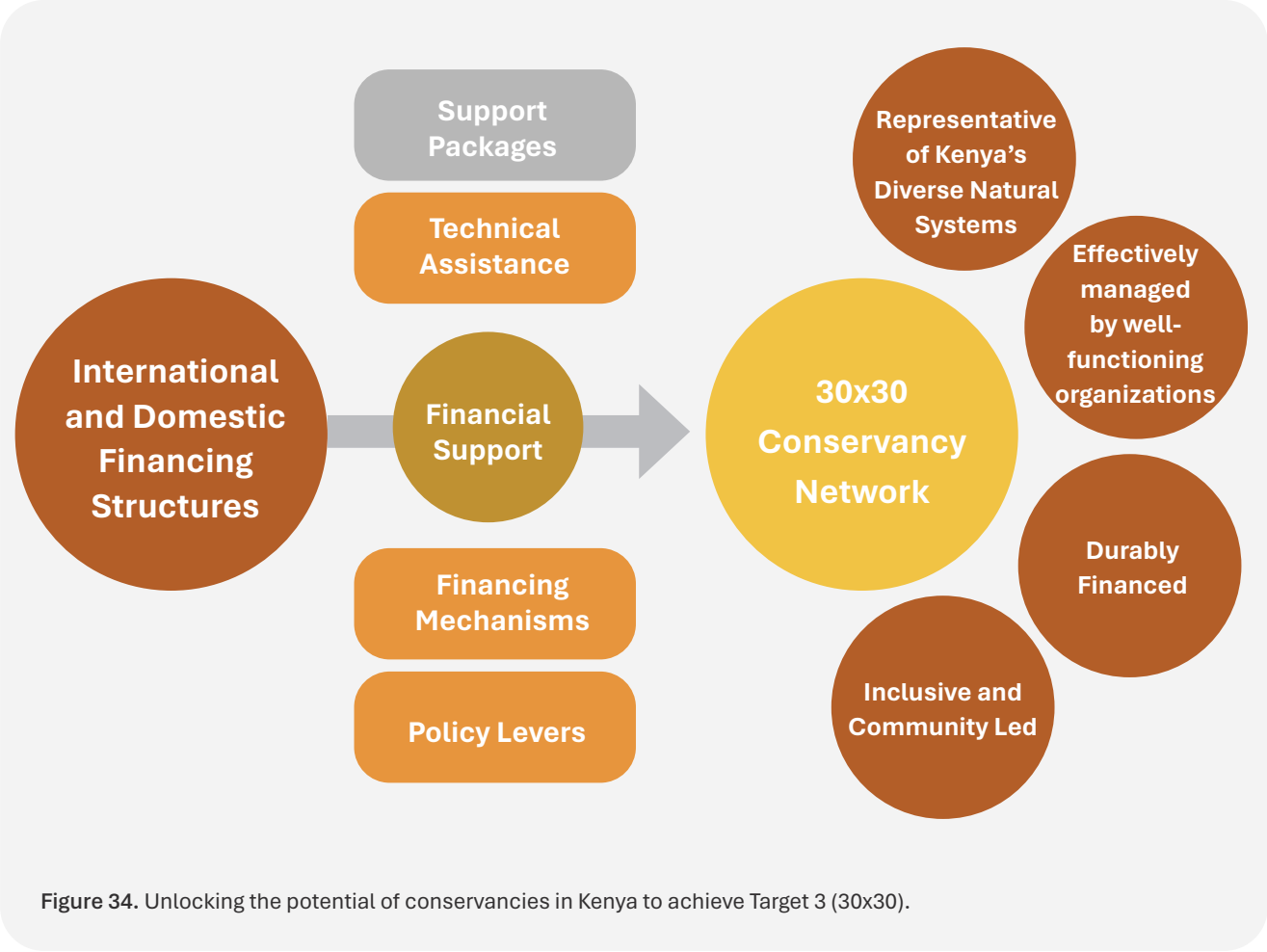

Figure 34. Unlocking the potential of conservancies in Kenya to achieve Target 3 (30x30).

KWCA

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Living nature, Living people

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