



ABS Compliant Biotrade in South(ern) Africa

Phase III proposal

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The proposal is split into **5 sections** for ease of use please refer to the description below:

SECTION I (page 5) – provides the **context** within the biotrade sector that the ABioSA phase III project will be implemented as reference.

SECTION II (page 12) – provides the **background** of ABioSA project Phase I & II, what has been achieved and lessons learnt.

SECTION III (page 18) – provides the **project modalities** for design, implementation and close out during Phase III against the proposed project outcomes and indicators.

SECTION IV (page 44) – provides information regarding the **contributions** ABioSA Phase III will make to mainstreaming topics and related programmes.

SECTION V (page 47) – provides the **annexures** referred to in the ABioSA Phase III document for further information.

1 Executive summary

The proposal was designed with the exit in mind before entering the third and final phase. ABioSA was granted an extension of a year which was used to conduct a Quo Vadis in preparation for ABioSA phase III. The Quo Vadis provided for an in-depth, objective assessment of the relevance, efficiency, effectiveness, impact and sustainability of the project activities over the last two phases. The results guided the project team as to what to continue with and amplify in the proposed new phase, what to adapt, and what to stop. The Quo Vadis period provided a platform for comprehensive engagements with key beneficiaries, partners and collaborators for coordinated ideation and planning. Nothing new will be started in phase III and every activity is viewed through a sustainable lens of how and what to leave behind.

In its third phase the ABioSA project aims to continue to contribute to the long-term impact of creating a competitive, resilient, prosperous, inclusive, and sustainable ABS-compliant biotrade sector in southern Africa. Central to this ambition is strengthening the agency of SMMEs, associations, and government actors - so that they are not only recipients of support but also decision makers, innovators and carriers of change beyond the project.

The systemic competitiveness framework is ingrained in the design of the project and will continue to be so. The knowledge management (KM) approach will replace the systemic insight approach as part of the management tools to further the projects approach as described in the phase II proposal of *“not only striving for direct impacts but also contribute to **systemic insight and change**. In this way, KM becomes a vehicle for agency—equipping stakeholders with evidence, stories, and shared perspectives to act with confidence in a complex environment. Systemic change often has a greater impact than direct assistance as even people/SMMEs with no immediate contact with the project will benefit indirectly.”*

Building on the previous two phases the project will:

- (1) provide appropriate technical and financial enterprise support to SMMEs
- (2) strengthen industry associations to facilitate the implementation of sector plans
- (3) support inclusive strategic implementation with government to create an enabling environment for biotrade and, through its KM ecosystem, raise awareness, share knowledge and experiences and advocate for change.

In each of these three components, activities have been designed not only with the exit in mind but with the intention that stakeholders themselves exercise choice, take responsibility, and build practices that endure.

The ABioSA project phase III will now contribute to the global GIZ programme **‘Strengthening the national implementation of the global biodiversity goals’** and module objective being Selected partner countries are better able to implement their national biodiversity targets aligned with the Global Biodiversity Framework (see section IV).

2 Abbreviations

ABioSA	ABS Compliant Bio-trade in South(ern) Africa
ABS	Access and Benefit Sharing
AfCFTA	African Continental Free-Trade Agreement
ATM	African Traditional Medicine
BABS	Bioprospecting Access and Benefit-Sharing
BIA	Bio-Innovation Africa
BioPANZA	Bio Products Advancement Network South Africa
BSO	Business Support Organisations
CAM	Complementary and Alternative Medicines
CBD	Convention on Biological Diversity
DFFE	Department of Forestry, Fisheries and the Environment
DSBD	Department of Small Business Development
DSTI	Department of Science, Technology and Innovation
FDS	Food and Dietary Supplements
GACP	Good Agricultural and Collection Practices
GBF	Global Biodiversity Framework
GHP	Good Harvesting Practice
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)
GMP	Good Manufacturing Practices
GQSP	Global Quality and Standards Programme
HACCP	Hazard Analysis Critical Control Point
IKS	Indigenous Knowledge System
IPLC	Indigenous peoples and local communities
KM	Knowledge Management
M&E	Monitoring and Evaluation
MRM	Monitoring and Results Measurement
NBES	National Biodiversity Economy Strategy
NBF	National Biodiversity Framework
NDC	Nationally Determined Contributions
NEMBA	National Environmental Management: Biodiversity Act
NIPF	Indigenous Natural Products Fund
PPP	Public Private Partnership
PSD	Private Sector Development
ROM	Results Oriented Monitoring
RIS	Re-imagined Industrial Strategy
SANBI	South African National Biodiversity Institute
SDG	Sustainable Development Goals
SDP	Sector Development Plan
SECO	Swiss State Secretariat for Economic Affairs
SEFA	Small Enterprise Finance Agency
SIPPO	Swiss Import Promotion Programme
SSAIP	Swiss-South African Intellectual Property Project
SMME	Small Micro and Medium Enterprises
The dtic	The department of trade, investment and competition
UEBT	Union for Ethical BioTrade
UNCTAD	United Nations Conference on Trade and Development
UNFCCC	United Nations Framework Convention on Climate Change
UNIDO	United Nations Industrial Development Organisation
VC	Value Chains

3 Context

3.1 International context

The Nagoya Protocol on Access to Genetic Resources and the Fair and Equitable Sharing of Benefits Arising from their Utilization is an international agreement, supplementary to the 1992 **Convention on Biological Diversity** (CBD), entered into force in 2014. Its aim is to support the implementation of the third objective of the CBD: the fair and equitable sharing of benefits arising out of the utilisation of genetic resources, thereby contributing to the conservation and sustainable use of biodiversity. South Africa became party to the CBD in 1995 and ratified the Nagoya Protocol in 2013.

The wealth of biodiversity within a country is recognised as an opportunity to support national sustainable development goals. A well developed and functioning national legal, institutional and administrative ABS framework and other measures will enable fair and equitable sharing of benefits to support local livelihoods, as well as providing business and job creation opportunities.

The 17 Sustainable Development Goals (SDGs) are an additional context for the project. The SDGs addresses the interconnected challenges of poverty, inequality, climate, environmental-degradation, prosperity and peace and justice. In 2022 the Kunming-Montreal Global Biodiversity Framework (GBF) was established and is key to achieving the 2030 SDGs. Specifically, the GBF focuses on halting and reversing biodiversity loss while also giving much more attention to benefit sharing (target 13), which is essential for achieving sustainable development. The GBF's 23 targets are aligned with various SDGs, including those related to food security, water management, climate action, and ecosystem health. The relevance and contribution towards specific GBF goals of the project will be further discussed in section 4.1.

Parties to the United Nations Framework Convention on Climate Change (UNFCCC) and the Paris Agreement are encouraged to pursue climate-compatible development. The diversification of climate-resilient and under-utilised species fits within this mandate by contributing to both mitigation and adaptation.

Through nature-based solutions, indigenous species in agroforestry or restoration systems help sequester carbon, improve soil and water retention, and provide microclimatic buffers, all of which align with the Global Goal on Adaptation. Countries can also integrate diversified biodiversity-based value chains into their Nationally Determined Contributions (NDCs), particularly within land use, agriculture, and restoration commitments, thereby linking climate adaptation directly with local livelihoods.

Beyond these explicit pathways, diversification also addresses less codified but increasingly important concerns. By reducing reliance on monocultures, it lowers systemic climate risks in agriculture and forestry. At the same time, the valorisation of local species advances principles of climate justice and equity by strengthening local

knowledge systems, sovereignty, and adaptive capacity—an approach that is gaining recognition within UNFCCC processes. South Africa is a Party to the UNFCCC and the Paris Agreement, committing through its NDCs to reduce greenhouse gas emissions, build climate resilience, and pursue a just transition that balances development, equity, and sustainability.

3.2 Regional context

Where genetic resources are found across country boundaries, such as in the Southern African region, parties should endeavour to cooperate as appropriate, in line with Article 11 of the Nagoya Protocol, with the involvement of indigenous and local communities with a view to implementing the Protocol. Collaboration between neighbouring African countries to harmonised approaches and standards for transboundary value chains - including quality, traceability, consistency, and safety - is a first and important step towards practical regional cooperation as envisioned by the **African Continental Free-Trade Agreement (AfCFTA)**. The way in which ABS is dealt with within the region could also be added to the above.

South Africa is one of the 38 countries to have ratified the **AfCFTA**. The agreement refers to the group of countries on the continent, within which tariffs and non-tariff trade barriers between the members are generally abolished, but with no common trade policy toward non-members (i.e. the North American Free Trade Agreement, the EU, and the European Free Trade Association). The AfCFTA aims to reduce all trade costs and enable Africa to integrate further into global supply chains. It will eliminate 90% of tariffs, focus on outstanding non-tariff barriers, and create a single market with free movement of goods and services (WEF, 2021)

3.3 National policy context

ABioSA phase I was implemented from February 2018 and phase II from November 2021 in close partnership with **the Department of Forestry, Fisheries and the Environment (DFFE)**. The DFFE leads the South African government's approach to bioprospecting and biotrade. This collaboration is guided by the existing legislative framework, i.e. the National Environmental Management: Biodiversity Act of 10/2004 (NEMBA); and the Bioprospecting, Access and Benefit-Sharing Amendment Regulations, 2015 (BABS), which govern access to South Africa's Indigenous Biological resources (IBRs) and ensure the sharing of benefits that arise from their utilisation. Also requiring benefit sharing for the trade of biological resources (see below) in BABS the SA legislation requires benefit sharing for a much broader scope of commercial activities than defined by the Nagoya Protocol such as the inclusion of IPLCs within the biotrade value chains, where undertaking R&D on genetic resources is the trigger.

BABS defines Biotrade as “the buying and selling of milled, powdered, dried, sliced or extract of indigenous genetic and biological resources for further commercial exploitation” and bioprospecting as “searching for, collecting, harvesting and extracting living or dead indigenous species, or derivatives and genetic material thereof for

commercial or industrial purposes”. According to a 2012 analysis of the commercial bioprospecting market of South Africa, to determine the market size in preparation for the development of the South Africa’s National Biodiversity Economy Strategy (NBES) in 2016, there is an 80 % growth potential for the Bioprospecting Economy. Several of the value chains of interest in the bioprospecting and biotrade sector are transboundary in the southern African region.

The current NBES review process provides an excellent platform for substantially improving the development and growth of the bioprospecting and biotrade sector as it set out ten “Transformative Enabling Interventions.” Given that NBES was developed in 2016, more than a decade ago, the data provided in the above paragraph from the NBES is outdated. However, in 2023 the ABioSA supported the DFFE to update the data of the NBES based on the growth and support that has been provided over the past 10 years to the biodiversity economy.

The market analysis revealed the following highlights and the key salient outcomes:

- The online retail shop survey found a total of 1,285 unique products containing natural ingredients. This is a substantial growth of more than 130% in the product offering in contrast to the 549 products observed during the shop survey in 2012.
- The number of indigenous species included as ingredients in products was 36 and 179 brands or organisations are producing these products, compared to 24 species and 122 brands found in 2012. In the study the following species comprise ingredients in 80% of the surveyed products:
 - Bitter Aloe
 - Rose Scented Geranium and other *Pelargonium spp.*
 - Baobab
 - Rooibos
 - Marula
 - Kalahari Melon
- The total revenue produced from value-added products sold in the local or domestic retail market containing biological resources as an ingredient increased from R1.47 billion (DEA, 2015) to between R5.40bn and R6.48bn in 2022.
- This represents a remarkable growth rate of 15% CAGR (Compound Annual Growth Rate) over the period from 2012 to 2022.
- Exports of bio-products from South Africa had increased to R694 million by 2022. The CAGR for exports over the period from 2012 to 2022 was high at 8.7%, which underscores the robust annual growth during this timeframe. In the same period, the value of world exports also experienced growth at a comparable CAGR of 9.9%.
- The size of the local bioprospecting segment in 2022 was approximately R1.018 billion in terms of total revenue generated.
- The full value chain GDP contribution is estimated between R3.5 and R4.1 billion in 2022.
- The sector contributed an estimated 15,000 jobs in 2022.

To develop the implementation plan for the National Biodiversity Economy Strategy, DFFE co-hosted an Operation Phakisa – Biodiversity Economy Delivery Lab in 2016. One of the initiatives for the Bioprospecting and Biotrade Economy Sector was to establish the BioProducts Advancement Network of South Africa (BioPANZA). BioPANZA is a collaborative initiative between the **DFFE**, the **Department of Science, Technology and Innovation (DSTI)** and the **Department of Trade, Industry and Competition (the dtic)**. It is mandated to ensure coordination, effective and efficient collaborations between various stakeholders in the sector to address a gap or developmental challenge to take South African value-added natural ingredients to the world.

Additionally, in June 2019 the South African cabinet endorsed the **Re-imagined Industrial Strategy (RIS)**. The RIS re-emphasises the role of the state in changing the growth trajectory of the South African economy through supporting improved industrial performance, dynamism and competitiveness. A key pillar of the RIS is the development of masterplans, implemented under **the dtic**. Central to these masterplans is the strong social compact between government, industry and organised labour, where each social partner commits to implement concrete interventions to transform and build the economy.

Also, of importance within the national policy context are **Indigenous Knowledge Systems (IKS)**, which are a cross-cutting theme of the 10 Year Plan of the DSTI. Reaffirming its commitment to mainstream IKS in South Africa, the South African government envisages IKS as contributing towards sustainable economic development in the country and advancing its scientific competitive advantage. The Protection, Promotion, Development and Management of Indigenous Knowledge Act, Act No. 6 of 2019 (also referred to as “the IK Act”) was assented by the President on 13 August 2019. However, the Act will only come into operation on a date fixed by the President by proclamation in the Government Gazette. The IKS Act will essentially be to redress and bring indigenous knowledge into the mainstream, and to address how indigenous communities could contribute and become part of the mainstream economy, using their own indigenous knowledge. The DSTI is also the formal holder of the National Recordal System regarding indigenous species.

3.4 Sectoral context

South Africa is the third most biologically plant diverse country in the world, with over 21,000 plant species, many of them endemic. The country is home to the Cape Floristic Kingdom and shares species with neighbouring countries, making it an attractive hub for regional biotrade collaboration. This rich biodiversity underpins the biotrade sector, while cultural heritage adds value through traditional knowledge linked to food, medicine, cosmetics, ceremonial use, and other applications. Together, these factors provide a strong foundation for a growing biotrade economy. Products derived from indigenous biological resources enter a wide range of markets, including:

1. Complementary and Alternative Medicines (CAMs)
2. Food and Dietary Supplements (FDS)

3. Functional Foods and Beverages (health claims, pre-market notifications)
4. Cosmetic Products (natural, organic, active ingredients, etc.)
5. Flavours and Fragrances
6. African Traditional Medicines (ATMs) – currently mostly in the informal domestic market

Export markets with the greatest potential include Europe, North America, and Asia; where demand for natural, organic and sustainable ingredients continues to rise. These markets are increasingly driven by consumer expectations around transparency, sustainability and equitable benefit sharing (particularly in Europe). At the same time, South Africa's domestic market for natural health and wellness products is growing steadily, creating further opportunities.

The sector is marked by both complexity and opportunity. Activities span from wild harvesting and cultivation through to advanced research and development of sophisticated finished products. While several value chains such as Rooibos, Buchu, *Pelargonium sidoides* and Baobab are already well established, many other species identified under the National Biodiversity Economy Strategy (NBES) still hold untapped potential. Collective solutions for responsible environmental practices, benefit sharing and market access - developed and driven by collaborative partnership between government, industries and development partners - are increasingly used to address shared challenges around biodiversity protection, market access and regulatory compliance.

South Africa was an early adopter of the CBD and is recognised as a continental leader in this area. However, smaller enterprises in particular continue to face challenges in navigating ABS procedures and complying with international standards. This highlights the importance of supportive mechanisms that make participation feasible for all actors, from micro-enterprises to larger exporters.

Typically, enterprises in the biotrade economy take between five and ten years to reach compliance and access desired international markets. Unlocking this innovation and growth potential requires multi-stakeholder collaboration to strengthen enabling environments, reduce barriers to entry, and ensure that biodiversity protection, cultural heritage, and fair benefit sharing remain at the core of sector development.

3.5 Problem statements/areas

Despite strong growth potential, the South African biotrade sector continues to face systemic challenges that constrain product development and market access. Many of these are structural and affect both established exporters and smaller enterprises, while others are more acute for emerging businesses and communities.

- Access and Benefit Sharing (ABS) compliance remains one of the most pressing bottlenecks. Although South Africa is a continental leader in ABS implementation, businesses – particularly SMMEs – struggle to navigate complex procedures,

identify associated Traditional Knowledge (a-TK) holders and negotiate agreements often necessary at different steps of the value chain. In cases where there are industry-wide benefit sharing agreements, and centralised support for permit applications, the barriers are fewer, but to reach this point significant investment from private sector is still needed. The permitting process, though improved in terms of timelines, is still not adequately streamlined and remains resource-intensive, delaying market entry and limiting fair and equitable benefit sharing.

- Biodiversity conservation and sustainable use are central to the sector's long-term viability, but in some industries wild harvesting practices and habitat pressures continue to create risks, and tangible solutions for benefit sharing for conservation and sustainable use remains absent. Individual entities and less organised industries typically lack the resources to conduct resource assessments or implement management plans independently, underlining the need for collective solutions and peer exchange with industries such as honeybush where successful models exist.
- Fragmentation of support services and coordination gaps persist at the meso-level. While a range of industry associations, government programmes and support agencies exist, they are not always aligned, making it difficult to leverage collaboration for optimal impact and provide SMMEs with access to coherent guidance on regulatory compliance, business development and market readiness.
- Market access challenges remain significant. Non-tariff barriers such as plant health, food/consumer safety, and environmental certification are increasing, alongside growing buyer expectations on traceability, quality and sustainability. Medium and small businesses often lack the financing and capacity to meet these requirements consistently, limiting their ability to position themselves in high-value markets. Market fluctuations and price cycles for certain species further expose small and single-product enterprises to risk.
- Limited value addition and inequitable participation also continue to characterise the sector. Many Indigenous Peoples and Local Communities (IPLCs) remain at the lower end of value chains, supplying raw materials with limited opportunities for beneficiation or partnership-based participation. Similarly, start-up SMMEs and cooperatives often lack the skills and systems required for good practices (e.g., GACP, GMP, HACCP) and investment readiness, which restricts their access to finance and markets.

These challenges highlight the need for ABioSA Phase III to consolidate progress made under Phases I and II by further supporting the simplification of compliance pathways, strengthening biodiversity safeguards, improving sector coordination, and to reinforce building the capacity of smaller and emerging enterprises to participate more equitably in domestic and international value chains.

3.6 SMME constraints

Small and micro enterprises are the backbone of the South African biotrade sector. Most are family-run operations with fewer than ten employees, and while they play a vital role in local supply chains, they face a comprehensive set of national legislation and regulatory requirements (e.g. labour, company law, environmental compliance, financial reporting) that are difficult to navigate without external support.

Ambitions among these enterprises are strong: to move up the value chain, to add value locally, to improve compliance with national and international standards, and to market their products more effectively. Yet they are constrained by limited administrative capacity, financial resources, and access to information. This often results in an uneven playing field compared to larger more established domestic and international businesses.

Specific limitations for SMMEs include:

- **Regulatory compliance:** Struggles with complex permitting processes (especially ABS), as well as expensive and resource-heavy certifications (UEBT, FairWild, Fairtrade, organic, HACCP, etc.) and product registrations (Geographic Indications, Novel Foods).
- **Market access:** Difficulty in securing reliable customers and entering value chains due to inconsistent volumes, challenges with quality and safety standards, and high non-tariff barriers in export markets.
- **Information and networks:** Limited ability to obtain timely information on market and industry trends, potential international competitors, appropriate IP instruments and to translate this into practical business opportunities.
- **Branding and positioning:** Lack of resources to define and market their competitive advantage through design, packaging, labelling and intellectual property management.
- **Financial vulnerability:** Exposure to price fluctuations and market cycles, which is particularly acute for single-product enterprises or those reliant on wild-harvested species.

Without targeted support, these limitations prevent SMMEs from achieving scale, benefiting fully from local and international demand, or participating equitably in biotrade value chains. Addressing these constraints is therefore essential for sector-wide growth and inclusion, and a core focus for Phase III.

4 Background of the Project

4.1 Relevance of the project

Within the context described above, the ABioSA project maintains relevance at all levels, as described below.

4.1.1 International relevance

The potential of Southern Africa's biological diversity has so far not been sufficiently exploited to establish and expand international value chains that include benefit-sharing, particularly value chains to produce high-quality food, flavour, cosmetic and nutraceutical ingredients and products. South African SMMEs struggle to respond to global demand. ABioSA provides support to increase access to global, regional and local market value chains both on a SMME and sector level.

Additionally, ABioSA contributes to the following SDG goals through evidence-based results as well as outcomes. Also note the direct link to the UNCTAD BioTrade Principles and Criteria further explained under section 5.5 Monitoring and Evaluation.

GBF 2050 Goals and 2030 Targets			
2050 Vision	Living in harmony with nature where: "By 2050, biodiversity is valued, conserved, restored and wisely used, maintaining ecosystem services, sustaining a healthy planet and delivering benefits essential for all people."		
2050 Goals	A Integrity, connectivity, resilience of all ecosystems maintained, enhanced restored; species extinction rate and risk reduced; genetic diversity maintained	B Biodiversity sustainably used & nature's contributions to people valued, maintained, enhanced, restored	C Benefits from the utilization of genetic resources , digital sequence information and traditional knowledge associated with genetic resources shared fairly and equitably
	D Adequate means of implementation secured (financial resources, capacity-building, technical and scientific cooperation, access to and transfer of technology)		
2030 Mission	To take urgent action to halt and reverse biodiversity loss to put nature on a path to recovery for the benefit of people and planet by conserving and sustainably using biodiversity and ensuring the fair and equitable sharing of benefits from the use of genetic resources, while providing the necessary means of implementation.		
2030 Action Targets	1. Reducing threats to biodiversity	2. Meeting people's needs	3. Tools and solutions for implementation and mainstreaming
	1 Spatial planning & reducing losses	9 Sustainable use of wild species	14 Mainstreaming biodiversity across sectors
	2 Restoration of ecosystems	10 Sustainable management of areas & productive systems	15 Business and biodiversity
	3 Conservation and protection of ecosystems	11 Ecosystem functions and services	16 Sustainable consumption
	* 4 Conservation of species	12 Green and blue spaces in urban areas	17 Biosafety
	* 5 Harvest, trade and use of species	13 Access and benefit sharing	18 Subsidies and incentives
	6 Invasive alien species		19 Financial resources for biodiversity
	7 Pollution		* 20 Capacity-building and development
	* 8 Biodiversity and climate change		* 21 Information and knowledge
			* 22 Participation of IPLCs
			* 23 Gender equality

Figure 1: *GBF 2050 goals and 2030 targets ABioSA is responding to.

4.1.2 Regional relevance

Many biological and genetic resources are found in more than one country, and value chains are often transboundary. As in phase I, and based on the selected value chains, ABioSA will maintain its regional scope by offering support to SM(M)Es and Business Support Organisations (BSOs) in all Southern African Development Community (SADC) member states.

During phase I, four SMMEs from neighbouring countries (1 x Botswana, 2 x Zimbabwe and 1 x Zambia) were supported through technical capacity building and received financial support through the two rounds of calls for proposal. SMMEs and BSOs (incl. associations) from the region actively participated in the SDPs of biotrade value chains with a regional footprint, these being Marula and Baobab. The ABioSA project will continue the process of preparing southern African communities to understand, share and benefit from the use of their traditional knowledge and natural resources.

The potential impact of how the AfCFTA could play a role in regional market access, raw material provision to and from regional markets, and opportunities to address non-tariff barriers in the region shall be investigated through this platform.

4.1.3 National relevance

ABioSA supports the achievement of key government targets as set out in the NBES, including economic growth, transformation and sustainability. Within this context the project also supports the prioritisation of DFFE species identified for cultivation and sustainable harvesting.

ABioSA has been attempting to facilitate improved collaboration between DFFE and DSTI. This entails understanding the practical implementation of the two departments' relevant regulations, the BABS and the IKS Act of 2019. With better understanding of synergies and overlaps, the aim is to create dialogue with key sector stakeholders, DFFE and DSTI, to identify efficient and effective recommendations to support private sector with the implementation of these policy requirements.

4.1.4 Sector relevance

ABioSA works with selected biotrade value chains and plant species, including some which straddle national borders. These have been identified based on criteria including traditional knowledge, ecological sustainability, market demand, potential for value-adding and job creation, and the participation of IPLCs and SMMEs. The ABioSA programme together with its SECO sister project the United Nations Industrial Development Organisation (UNIDO) Global Quality and Standards Programme (GQSP-SA) focuses on high-impact value chains consisting of a cluster of six seed oils and other ingredients and six essential oils and other ingredients, from which six value chains with the most economic potential were selected for the creation of sector development plans.

It is within this context that the ABioSA team decided to steer the development of the SDPs (a key activity of phase I) within the same framework as that of **the dtic** masterplan. The SDPs are important strategic documents with an important regional dimension. ABS value chains combine growth and regulate strategies that call for increased intergovernmental coordination and interactions between DFFE, **the dtic** and DSTI. BioPANZA can play an important coordination role for government departments to unlock opportunities in the sector or in a specific value chain.

The ABioSA project is designed in close alignment with the other SECO sister projects such as the Swiss Import Promotion Programme (SIPPO), GQSP-SA, and the Swiss-South African Intellectual Property Project (SSAIP).

ABioSA III will be set up under the Global Project called “Strengthening national implementation of global biodiversity targets”. It is housed in GIZ South Africa under the Centre of Cooperation with Private Sector (CCPS) and coordinates with other related projects funded by the German Federal Ministry for Economic Cooperation and Development (BMZ). Additionally, the project links to the Global Environment Facility (GEF 6) funded project called “Development of Value Chains for Products derived from Genetic Resources in Compliance with the Nagoya Protocol on ABS and the NBES” executed by DFFE, the Agence Française de Développement (AFD) and other relevant donor programmes.

4.2 Results from previous phases and lessons learned

4.2.1 Direct results achieved

In support of the above findings the following results have been achieved by the project during phase II. For further information, please see the ABioSA phase II close-out report.

1. Across the 27 SMMEs supported by ABioSA through financial and technical support under outcome 1 the following concrete growth opportunities have been unlocked:
 - 1.1 Increased market access and diversification
 - 1.2 Innovation and product development
 - 1.3 Improved community engagement as part of the ABS permit application process
 - 1.4 Improved quality processes and procedures through implementation of QMS
2. Four associations - the Buchu Association (BA), the South African Honeybush Tea Association (SAHTA), the Southern African Botanical Products Association (SABPA), and the African Baobab Alliance (ABA)—were supported to implement their Sector Development Plans (SDPs) under outcome 2 leading to:
 - 2.1 Increased/improved sector governance, institutional development and management
 - 2.2 Institutionalisation of production, trade, and employment data collection providing for the first time, a baseline of quantitative data on volumes, hectares under cultivation, average prices, and sector employment (permanent and seasonal).
 - 2.3 Improved strategic and regulatory engagement and compliance including TK negotiations.

- 2.4 Strengthened quality standards and improved credibility in domestic and international markets.
- 2.5 Increased and improved generic marketing and market access
- 2.6 Increased research, development and innovation based on SDP findings
- 2.7 Increased conservation and sustainable supply efforts.
- 3. Two flagship initiatives were supported under ABioSA Phase II by BSOs - the South African Medical Research Council (SAMRC) baobab clinical trial and the Botanicals – Trusted and Authenticated Fingerprinting (b-TAF) project led by Precision Oil Laboratories. These BSOs illustrate how targeted technical interventions can create long-term assets for industry and science alike such as:
 - 3.1 The SAMRC Baobab trial has generated significant potential benefits across different stakeholder groups. For small and medium-sized enterprises (SMEs) active in the baobab sector, the study has laid the groundwork for developing future evidence-based product claims.
 - 3.2 Two female postdoctoral fellows were trained as project managers, gaining critical skills that position them to lead future research. Beyond immediate outputs, the trial has elevated SAMRC's profile as a credible partner for industry associations and regulators in conducting rigorous clinical research on indigenous plants.
 - 3.3 The b-TAF delivered results well beyond its initial scope. A digitised Laboratory Information Management System (LIMS) was established, and a predictive model capable of detecting adulteration with 95% certainty was created for Marula and Baobab.
 - 3.4 A publicly accessible authenticity verification platform (www.b-taf.org) was launched, enabling producers, buyers, and regulators to verify marula and baobab oil authenticity.
 - 3.5 The project improves product credibility, enhance market access, and provide robust evidence for sector governance. It also complements existing SABS standards and create a foundation for future applications of geographic indication (GI) protection for African oils.
- 4. Under outcome 3 ABioSA has developed 29 additional knowledge products (KPs) providing verifiable information and data used as a basis for stakeholder engagement, training and decision making in some cases.
- 5. ABioSA Phase II invested significantly in various stakeholder platforms as a way of strengthening dialogue, visibility, and cohesion across the biodiversity economy. These platforms provided consistent, accessible spaces for stakeholders to exchange information, share experiences, and align around emerging priorities. They supported building trust, improving sector-wide communication, and creating opportunities for collaboration in pre-competitive spaces.

ABioSA contribution to national targets

The module indicators resulting from the project activities directly contribute towards the national NBES targets being:

National NBES targets	ABioSA module Indicators
1. GDP contribution growth from R309 mil in 2013 to R1,7 billion in 2030	1. Increase of the annual trade volume of USD 1 million by 2021 of sustainably produced biotrade products from South(ern) Africa is generated
2. Grow from 6 200 to 16 200 permanent jobs	2. Creating 50 new permanent jobs and 1 000 new seasonal jobs within ABS compliant value chains supported by the project.
3. Grow cultivation of natural ingredients by at least 500 hectares p/a	3. This additional indicator is being tracked by the project due to its importance for DFFE is new hectares under cultivation, the ABioSA project has captured hectares used for wild harvesting and cultivation.

NOTE: The results achieved over the project phases are available as part of the final Phase I technical close-out report and Phase II draft report.

4.2.2 Lessons learned

A number of valuable lessons were learned during ABioSA Phase I and were used to inform Phase II. This section elaborates on how Phase I lessons (*that will be indicated in italics in the section below*) were applied and further elaborated on in Phase II and/or will inform Phase III.

1. *“For real change to occur in the industry and/or IPLCs, activities should be driven from these groups and not government. For example, during the development of the honeybush sector development plan a honeybush joint action group was established with the slogan “from the community for the community”. This group collaborates closely with the South African Honeybush Tea Association (SAHTA) as well as with the existing honeybush community of practice that consists mostly of public sector representatives.”*
 - Learning from the above, in Phase II and the BIA supported Wild Harvester Collaboration, joint action groups showed that when communities convene on their own terms, they generate both accountability and momentum that carry beyond project activities.
2. *“IPLC groups such as cooperatives or outgrowers should be presented as supply/value chain actors and not beneficiaries. The business relationship is as important as the socio-economic and capacity support to ensure sustainability. In most of the government documentation this group is purely viewed as beneficiaries which results in a perception that the relationship is that of receiving not participating in the VC”*
 - In Phase II, the honeybush community engagement pilot highlighted to communities the value they can bring within the value chains and how to partner with VC actors. In May 2025 a-TK holder and industry dialogue was held. It took this engagement for the participants to agree and start taking action to change the role of a-TK holders to rethink partnerships within the VCs. Phase III will carry this forward by positioning IPLCs and SMMEs as co-creators of value in the sector.

3. *“Within the BSO environment to support SMMEs a single client view with streamlined due diligence process is needed, the cost to SMMEs to repeatedly provide the same information and go through the process of due diligence could be streamlined”*
 - This took much longer than anticipated and will only be implemented under outcome 1 of phase III.
4. Based on the lesson from Phase I that *“a lot of change is required on a meta level where beliefs and mindsets need to change, e.g. how do we change the narrative of the perception of ABS, gender equality etc. within the sector?”*
 - A number of activities contributed towards some of these beliefs and mindsets being addressed during Phase II.
5. During Phase I the lesson learnt was that *“In South Africa where there is already a challenge in terms of a wide variety of cultures and beliefs the importance of initiating dialogue on basis of **trust and understanding** is really important. Currently the “Bigger Picture” is seen through different filters by government and industry leading to different perceptions of, for example, the efficiency and inclusivity to the established permitting system. A “Team SA” mentality/approach with the focus on developing a collaborative master plan (similar to “Team Europe”) is needed”*.
 - Part of the path to healing is the mutually accepted acknowledgement that there is a problem of trust. During the public and private dialogue and TK holder and industry dialogues, making this visible and discussing it openly was the first step to achieving a mutually agreed picture of the future biotrade sector. This is also the discussion that will take place during the ABF 2025 policy and legislation cluster session.
6. *“Change takes time”*.
 - The honeybush SDP KP that was developed confirm this statement and learning from Phase I, with the following factor highlighted “Patience – Transformation is slow. The association has learned to embrace this and to go slower, together.
7. *“The project should not only act as a conduit between government and industry and academia but also between different government departments”*
 - Building trust also applies to the relationship between government departments which will be key during the implementation of Outcome 3 of Phase III.

4.2.3 Systemic competitiveness framework

The project will continue to make use of the systemic competitiveness framework developed by Esser, Hillebrand, Messner and Meyer-Stammer (1995), and which concentrates on the four social and economic levels and the way in which they inter-relate. It recognises that the challenges and opportunities within the ABS-compliant biotrade sector are embedded in a dynamic interconnected ecosystem of actors, institutions, rules, and behaviours. Rather than addressing constraints in isolation, the systemic competitiveness framework enables the project to identify and act on the leverage points that can produce sustainable change across the entire biotrade value

chain. For further information see **Annexure A – Systemic competitiveness framework** that forms the basis of this proposal.

As with Phase II the three outcome areas described under section 5.1.2 correspond with the micro, meso and macro levels of this framework. Contrary to Phase II, the meta level has been removed from Outcome Area 3 and is given special attention in this proposal to the meta level under the revised knowledge management approach described further below under section 5.3 as part of the insight and change management modalities and tools.

5 Project modalities

The proposal was designed with the exit in mind, entering the third and final phase. ABioSA was granted an extension of a year which was used to conduct a Quo Vadis in preparation for ABioSA phase III. The Quo Vadis provided for an in-depth, objective assessment of the relevance, efficiency, effectiveness, impact and sustainability of the project activities over the last two phases. The results guided the project team as to what to continue with and amplify, what to adapt, and what to stop in the proposed new phase. The period provided a platform for comprehensive engagements with key beneficiaries, partners and collaborators for coordinated ideation, planning and design. Nothing new will be started during Phase III and every activity was viewed through a sustainable lens of how and what will be left behind beyond the project’s lifetime.

The project taps into several management modalities and tools that have proven to be successful over the years and have now been categorised around when and how they are used. Results-based management is understood as a management strategy or plan with a set of tools focusing on performance and achievement of outputs, outcomes and impacts. However, unless these modalities and tools are effectively set in place and applied during the implementation and close out phase the planned outputs, outcomes and impacts will remain lofty plans and ideas on a piece of paper.

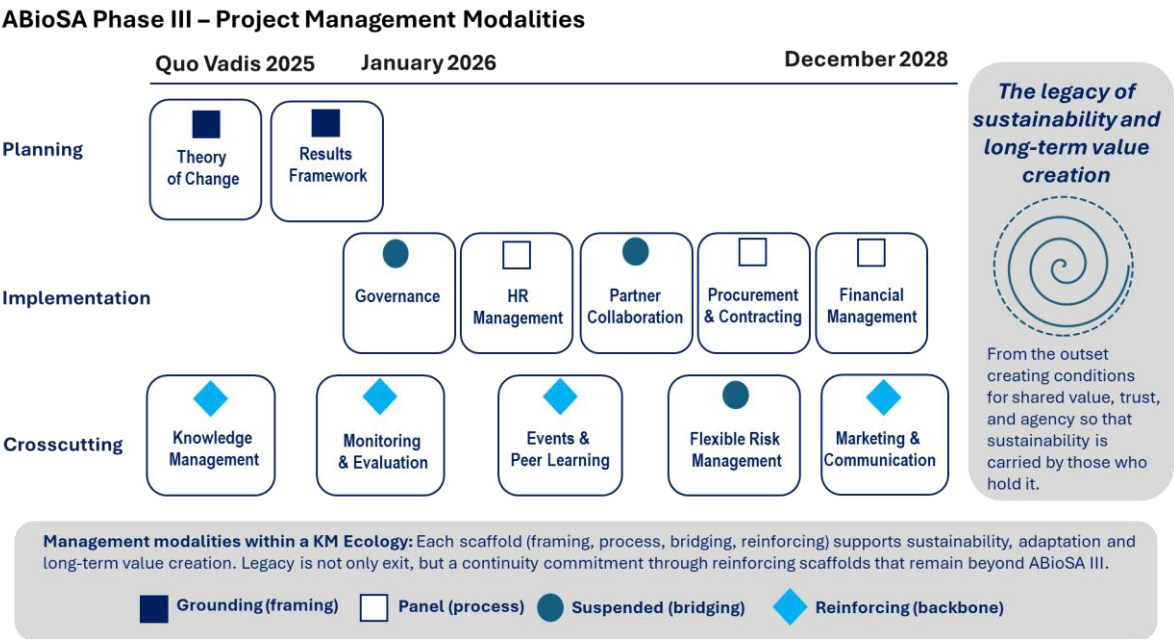


Figure 1: High-level project modalities illustration

The diagram above shows how ABioSA's management modalities form part of a Knowledge Management Ecology that sustains systemic competitiveness. Rather than acting as isolated tools, these modalities work together as scaffolds that hold up and connect different parts of the project cycle.

At the foundation and design, **grounded scaffolds** such as the Theory of Change (ToC) and Results Framework provide a common framing that links activities to outcomes and impacts. Alongside them, **panel scaffolds** like HR, procurement and financial systems create the sequence and structure for implementation, safeguarding integrity and maintaining the rhythm of delivery. **Suspended scaffolds** - governance, partner collaboration, and risk management - span boundaries and create adaptive spaces where diverse actors can negotiate, align, and respond to change. Threaded through all of this are the **reinforcing scaffolds** - knowledge management, M&E, communication, and peer learning - that embed resilience by building shared language, retaining experience and enabling feedback loops that keep learning alive.

Together, these scaffolds reframe the legacy as the project's **sustainability and long-term value addition** ensuring that ABioSA's investments continue to generate systemic value. In ABioSA III, this framing matters, the focus is not only on what the project leaves behind, but on creating from the outset the conditions for ownership, trust, and agency - so that stakeholders themselves can carry practices forward, adapt them, and continue to grow well beyond the life of the project.

The list of management modalities and tools used to successfully implement ABioSA phase III, from planning to close-out, is illustrated above and summarised below, following detailed description sections numbered according to the summary below.

5.1) Planning and design management

5.1.1 Theory of change

5.1.2 Results framework/logframe

5.2) Implementation and close-out management

5.2.1 Governance

5.2.2 Human resource management

5.2.3 Partner collaboration and portfolio integration

5.2.4 Procurement and contracting

5.2.5 Financial/budget management

5.3) Insight and change management (cross-cutting)

5.3.1 Knowledge management (KM) approach

5.3.2 Events/workshop/peer learning platforms

5.3.3 Monitoring and evaluation

5.3.4 Flexible risk management

5.3.5 Marketing and communication

5.1 Planning and design period

5.1.1 Theory of change

The Theory of Change (ToC) serves as strategic roadmap and communications tool that was developed during the design phase (as indicated in 5.1 above) as part of the Quo Vadis for ABioSA III. The ToC illustrates the pathways through which the project's activities contribute to meaningful and systemic change. Its message is relevant for communication with internal and external stakeholders and will provide direction to ascertain during the close-out evaluation whether the impact of the project has been achieved.

The ToC forms part of the set of management modalities and tools used by the project as summarised above, of which the ToC and the results framework/logframe is the set under the planning and design management tools (see attached **Annexure B** for the results framework/logframe).

The results framework/logframe is a living document that will be updated as the project evolves, guided by evidence, stakeholder feedback, and emerging contextual dynamics. In response to any deviation or change, risk management will be applied. The rest of the management tools will be further described under chapter 5.

The ToC serves a threefold purpose:

1. To explain the ToC by mapping the logical sequence from inputs and activities through outputs and outcomes to long-term impact.
2. To outline the core assumptions underpinning the ToC. These include contextual, economic, environmental and implementation assumptions that must hold true for the project to achieve its intended outcomes.
3. To present a results framework (logframe) – with clearly defined outputs, outcomes, impact statements and indicators. This logframe provides the basis for monitoring, evaluation, and learning, enabling the project to track progress, assess effectiveness, and generate evidence to inform adaptive management and stakeholder accountability during the implementation and close out phase.

The strategic roadmap ToC narrative provides a high-level summary for the third phase and how it aims to contribute to the long-term impact.

“If ABioSA supports the enhancing of SMME capabilities (micro), strengthening of sector coordination (meso), supporting government to create an inclusive, enabling environment (macro), and promoting effective knowledge creation and sharing (meta) then it will lead to increased production, compliance and export in turn leading to expanded local and international market access and equitable benefit-sharing which will contribute to the longer term impact of fostering a resilient, prosperous, inclusive, competitive, and sustainable biotrade sector in Southern Africa”.

The illustration below demonstrates how the project's intervention logic unfolds across multiple levels of the systemic competitiveness framework.

ABioSA Theory of Change – Project Level

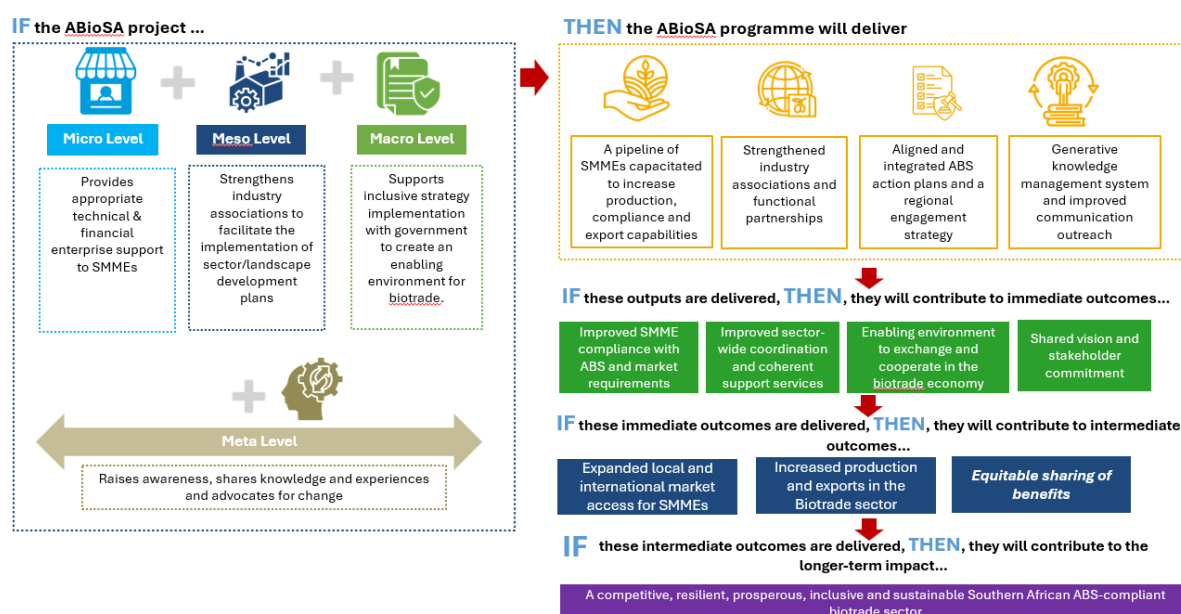


Figure 3: Strategic roadmap ToC illustration of ABioSA

Together, these interventions produce a suite of tangible outputs: a pipeline of capacitated and investment-attractive export-oriented SMMEs, sector/landscape plans that are funded and implemented, available and accessible resources to support provincial/national and regional compliance, conservation, sustainable use and equitable benefit sharing, and an institutionalised KM framework and system. These outputs are not ends in themselves, but enablers of systemic change.

The outputs give rise to a set of immediate outcomes:

- Improved SMME compliance with ABS and market requirements in the biotrade sector
- Improved and strengthened sector-wide coordination and coherent support services
- Enabling environment to exchange and cooperate in the biotrade economy
- Shared vision and stakeholder commitment

If these immediate outcomes are achieved, they will in turn contribute to surfacing a set of intermediate outcomes:

- Expanded local and international market access for southern African biotrade SMMEs
- Increased production, exports and contribute to an ecologically sustainable biotrade sector
- Equitable sharing of benefits

Collectively, these outcomes converge into a long-term impact of creating a resilient, prosperous, competitive, inclusive and sustainable Southern African ABS-compliant biotrade sector.

5.1.2 Phase III project narrative

The table below summarises ABioSA Phase III project components based on the intervention logic derived from the ToC and logframe, after which each of these components will be further described. All interventions and activities will be closely implemented with partners and stakeholders.

Components	Outcomes	Outputs (summarised)
Component 1 Provides appropriate technical and financial enterprise support to SMMEs. <i>(micro level)</i>	Outcome 1 Improved SMME compliance with ABS and market requirements in the biotrade sector.	1. Updated diagnostic assessment of selected SMMEs in the biotrade sector 2. A pipeline of SMMEs capacitated to improve production, compliance, export capabilities and access to finance.
Component 2 Strengthen industry associations to facilitate the implementation of sector/landscape development plans. <i>(meso level)</i>	Outcome 2 Improved and strengthened sector-wide coordination and coherent support services	1. Funded and approved continued support to existing sector plans 2. Funded and approved vertical and horizontal partnerships or plans between and across multiple associations 3. Funded and approved transboundary (neighbouring countries or SA provinces)/landscape approach plans for Nature Positive, EU trade, GI or other
Component 3 Supports government to create conditions for inclusive partnerships and cooperation amongst biotrade actors. <i>(macro level)</i>	Outcome 3 Enabling environment to exchange and cooperate in the biotrade economy	1. Available and accessible national resources to support compliance, conservation, sustainable use and equitable benefit sharing. 2. Inter-departmental forums able to mainstream conservation, sustainable use and equitable benefit sharing of biodiversity. 3. Strengthened regional engagement on access and benefit sharing on IBRs. 4. South to South peer learning events, study tours and dialogue platforms convened.

Table 1: Project summary table

Component 1

Outcome 1: Improved SMME compliance with ABS and industry specific market requirements in the biotrade sector by providing appropriate technical & financial enterprise support to SMMEs and in so doing, expanded local, regional and international market access for SMMEs” is achieved with improved reliable, safe, traceable and quality ingredients and products.

ABioSA intends to support the implementation of a programmatic approach to capacitate the pipeline of SMME within an enabling public and private environment through a diagnostic assessment and referral tool. The two-pronged tool being developed in 2025 in tandem with the BIA financial mechanism study will provide valuable information around

- 1) the maturity of SDP value chains based on end markets served
- 2) the maturity stages of the SMMEs’ business life cycle and their positioning within the respective biotrade value chains.

This will generate four categories to profile SMMEs within those value chains. Each category will have a set of criteria that identifies key characteristics and positions the SMME for graduation from one category to another. The tool will indicate a referral pathway between the meso level organisations/BSOs within the biotrade sector and provide recommendations on what type of technical and financial public and/or private support is required in each of the categories.

ABioSA will outsource the project management of the business mentoring support programme to create the enabling conditions for doing business with selected SMMEs so they can be supported in the transition between categories. The service provider will apply the diagnostic assessment and referral tool to select transitioning SMMEs for the next stage of support. A reference committee will review the referrals from the service provider.

Based on the categorisation, ABioSA would like to test the technical and financial support across the various SMME categories, with the key focus being support for export ready and exporting SMMEs. The SMMEs from categories not supported by ABioSA will be referred to other BSOs. In the case of ABioSA this support will be offered within the context of the supported SDPs at Meso level where the associations will play a vital role.

Leaving behind a functional and tested assessment and referral tool, and SMMEs able to access blended finance and technical support, at the end of the project phase will create a sustainable environment to build on by a healthy biotrade ecosystem.

Output 1.1: Updated diagnostic assessment of selected SMMEs in the biotrade sector

- 70 SMMEs profiled through the diagnostic assessment and referral tool.

Output 1.2: A pipeline of SMMEs capacitated to improve production, compliance, export capabilities and access to finance.

- **20** SMMEs mentored and/or trained through blended technical assistance and/or finance by the ABioSA project
- **50** SMMEs referred to other BSOs

Component 2

Outcome 2: *Improved sector-wide coordination and coherent support services* by strengthening industry associations to facilitate the implementation of sector/landscape development plans and in so doing increase production, exports and contribute to an ecologically sustainable biotrade sector.

The project supports the development and implementation of targeted sector plans for priority indigenous species for natural ingredients and finished products, facilitated by industry associations and BSOs. These plans are designed to institutionalise sector planning that will coordinate actors, mobilise resources and drive investment in value chain development. The support is provided through technical and financial assistance¹ based on the identified overarching SDP priorities.

As part of the ABioSA SDP M&E close-out process and the Quo Vadis during phase II, the associations have been engaged in the review of their progress in SDP implementation, evaluated their outcomes, and set a strategic direction. Additionally, they have captured their achievements, challenges and lessons learnt in preparation for future partnerships and resource mobilisation.

In line with GIZ procurement requirements, calls for proposals to meso-level organisations will be issued in Phase III. The call will be structured into three categories described under the output areas described below. The applicants will be requested to respond in line with the pillars of the SDPs namely:

1. Sector management, governance and M&E
2. Legislation and compliance
3. Conservation and sustainable use
4. Market access and generic marketing
5. Quality, registrations and competitiveness
6. R&D and Innovation
7. Traditional knowledge and community engagement (identified during the Quo Vadis)

In addition to the financial support, technical support will be facilitated through expert and peer-to-peer learning exchanges on prioritised themes and topics aligned to the SDP pillars. In support of the programmatic SMME approach from Component 1 the associations will collaborate with the selected service provider to support relevant

¹ Financial support here is understood as entering into a grant agreement or local subsidy contract with one of the groupings described above as a partner, not a service provider, based on a project proposal submitted to GIZ.

SMMEs to raise awareness of sector-wide activities already addressed in the SDPs, and what should be addressed on a company level.

In return the service provider updates the associations on any new reoccurring patterns across the SMMEs within that value chain, to be aggregated for sector-wide action aligned with work packages in the SDP, or what should be considered at the next SDP review.

This ensures that there is a symbiotic relationship between the micro and meso level to create a private sector enabling environment that makes it easier for businesses to succeed.

Leaving behind coordinated and aligned sector actors with defined strategic plans for specific value chains which allows actors to leverage sector-wide interventions to enhance participation and raise the competitiveness of the southern African biotrade sector.

Output 2.1: Funded and approved continued support to existing sector plans

- 1 - 3 sector plans approved for grant funding

Output 2.2: Funded and approved vertical and horizontal partnerships/plans between and across multiple associations

- 1- 3 collaboration agreements or joint action plans approved for grant funding.

Output 2.3: Funded and approved transboundary (countries or SA provinces)/landscape approach plans for Nature Positive Alliances, EU trade, GI or other

- 1 - 3 coordinating alliance established plans approved for grant funding

Component 3

Outcome 3: *An enabling environment to exchange and cooperate in the biotrade economy* by supporting governments to create conditions for inclusive partnering, and cooperation amongst biotrade actors, and making it easier for industry to increase production, exports and contribute to more equitable sharing of benefits for an ecologically sustainable biotrade sector.

A study conducted by the African Baobab Alliance (ABA) compared national ABS frameworks in the SADC region. It showed that South Africa is often lauded as leading the pack on ABS issues in Africa and some equitable access and benefit sharing cases in the world. NEMBA, BABS regulations and the NBES are in place with multiple checkpoints established, including the patent office, ports of entry and exit, provincial permit issuing authorities, and the department itself monitoring and enforcing ABS compliance. Additionally, it boasts two industry-wide benefit sharing agreements for rooibos and buchu, with honeybush to follow. This positions the DFFE to present its

unique approach and selling point through engagement nationally, within the region, and to other southern continental countries.

However, the procedures in place come alongside with considerable, sometimes according to actors prohibitive, transaction cost including time investments not only for SMME but also for a-TK holders to reach ABS compliance. This is a comparative economic disadvantage with a view to long term international market access as other (neighbouring) countries engaged in biotrade have no or less complex regulations. Relative uncertainty exists within regards to the draft IKS regulations under the DSTI, the draft NEMBA Bill and the draft NBES currently still under review. This creates uncertainty and the inability to forecast what the wider context for the strengthening of the enabling environment might look like. Other challenges are insufficient human resource capacity and the need for improved coordination among different governmental departments and stakeholders involved in the ABS process.

Over the past seven years the relationship between the ABioSA project and the department has grown and allows for this component to focus towards a four-tier approach in support of the DFFE to contribute to practical implementation of national, provincial and regional ABS frameworks responding to international commitments, such as the Nagoya Protocol.

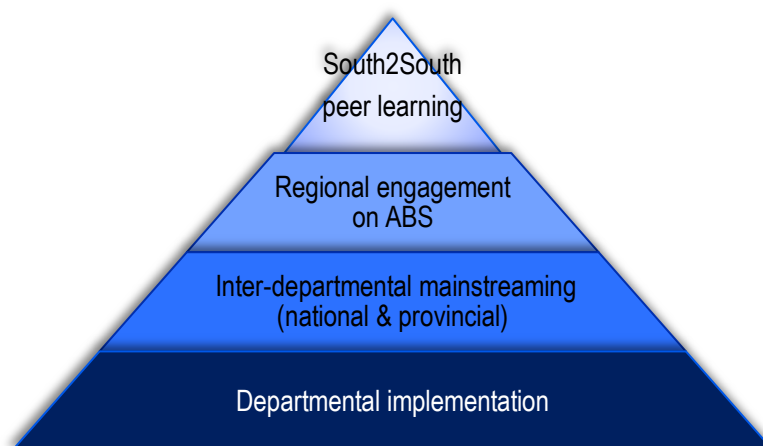


Figure 4: ABS four-tier approach

Leaving behind a strengthened institutional network equipped with tools at the end of the project phase to be able to maintain the exchange, learning and continued improvement of systems.

Output 3.1: Accessible national resources to support compliance, conservation, sustainable use and equitable benefit sharing.

- Online resource hub established and operational (separate from DFFE website)
- **15 - 20** sector specific templates, standard operating procedures (SoPs) etc developed in collaboration with users
- **3** industry organizations and **20** biotrade entities using the guidelines and templates

Output 3.2: Inter-departmental forums are able to mainstream conservation, sustainable use and equitable benefit sharing of biodiversity.

- 3 provincial regulatory decision-tree tools developed based on the national decision tree that was developed for understanding which permit to apply for when
- 6 forums held with measurable improvement in coordination

Output 3.3: Strengthened regional engagement on access and benefit sharing on indigenous biological resources.

- Regional forum on ABS established
- 6 regional peer-learning sessions held
- 2 industry-specific benefit sharing guidelines and templates, drafted and piloted
- 2 countries/industries piloting standardised models

Output 3.4: South to South continental peer learning events, study tours and dialogue platforms convened

- 2 South-to-South learning events and exchanges held
- 6 online South-2-South peer online sessions bringing in other Southern Countries along the way
- 4 countries and institutions participating
- 2 follow-up collaborations emerging from exchanges

Project beneficiaries

The project will support beneficiaries across the three levels of the systemic competitiveness framework as described above. Also, to note - as further described in section 5.5 - the project is not only striving for direct impacts but also to contribute to systemic insight and change. Systemic change often has a greater impact than direct assistance as even people and companies with no immediate contact with the project will benefit indirectly. In each of the below mentioned categories, there will be indirect beneficiaries impacted through systemic change:

- **Micro:** SMMEs, Co-operatives, IPLCs
- **Meso:** BSOs including associations, implementing agencies of government, universities, laboratories, private support institutions such as chambers etc.
- **Macro:** Government departments (national, regional and across the southern countries) and initiatives/programmes within government departments as well as international institutions.
- **Meta:** All of the above

5.2 Implementation and close-out period

In support of the design management tools, ToC, and logframe, the implementation and close-out management tools will ensure the team meets the project's time, cost, quality and development objectives and contributes towards systemic insight and change.

5.2.1 Project governance

Implementation of the ABioSA project is governed by the Project Steering Committee (PSC) guided by **Annexure C: PSC rules and procedures**. DFFE plays a dynamic role within the governance structure of ABioSA, with a transparent process supported by the presentation of detailed progress reports (mid-term and annual) with the ABioSA Project Manager serving as Secretariat. The project logframe is used to report on progress, expenditures against annual budget according to budget lines and by outcomes. Quarterly meetings are set up between SECO programme manager in Pretoria and the ABioSA Project Manager to review progress on the implementation of activities. In phase III, PSC meetings shall proceed with the schedule for mid-term and annual progress reviews.

Mid-term PSC meeting: Mid-term PSC meetings, restricted to the PSC members GIZ, SECO and the DFFE, are convened to discuss progress and lessons learnt to date and/or approve urgent matters that need attention.

Annual PSC meeting: A half day where contextual and technical aspects are presented for discussion and input from observers; and a half-day PSC meeting where decisions are taken on issues brought to the attention of the members by the project team.

The connection between stakeholders and PSC members through articulated consultation/steering meetings supports an inclusive, transparent, and smooth steering process. Ad hoc meetings could be called in the event that any risk has been identified that requires immediate attention.

5.2.2 Human resources

During phase II ABioSA and the global project BioInnovation Africa were managed by the same project manager together with a team of three staff members. All four these staff members were shared across the two projects. With BIA wrapping up its second and final phase end by April 2026, ABioSA will revert to two staff members as it was with Phase I. Great effort has been made to refine the implementation team to ensure the most optimal implementation and integration of project activities over the final phase. The approach allows the project to keep decision-making close to where the intervention is being implemented and where development is taking place.

Position	Based in	%	Main duties
Head of CCPS	GIZ Country office, Pretoria	5%	- Ensures a full integration of the project into the GIZ SA portfolio, rules and regulation. - Direct line manager for the ABioSA project manager
ABioSA Project Manager	GIZ Country office, Pretoria	100%	- Coordinates the dependencies and interfaces between the projects' systemic competitiveness levels and other projects - Partner and steering engagements - Strategic and operational planning and implementation - Project level financial planning, reporting and implementation - Contract, knowledge & risk management - Human resource management - Management of Macro-level component implementation - Management of strategic sector dialogues and platforms
ABioSA Technical Advisor	GIZ Country office, Pretoria	100%	- Responsible for the implementation of Micro and Meso level component implementation - M&E implementation for Micro and Meso-level components - Responsible for the management of service providers' ToRs and monitoring of deadlines & deviations (incl. GA & LS) for said components - Responsible for relevant event planning and proceedings - Contributes to electronic filing and data updating
HQ financial controller	GIZ HQ, Eschborn/ Bonn	15%	- Financial planning & monitoring support and reporting
CCPS Service Unit contribution	GIZ Country office, Pretoria	21%	- Contract management and additional logistical and administrative support services

Table 2: Project team layout.

The Centre of Cooperation with Private Sector (CCPS) cluster under which ABioSA is implemented in South Africa provides administrative, contracting, finance and procurement support through the service unit mentioned above.

5.2.3 Partner collaboration and portfolio integration

Establishing a strong cooperation infrastructure, consisting of formalised and informal collaboration relations, is essential for the success of the project. The forms of collaboration can or might change over the implementation cycle.

As in Phase I and II, ABioSA III will be executed through a **strategic partnership with the DFFE**, and the DFFE/GIZ Programme Agreement frames the agreed partnership roles and responsibilities. However, closer linkages with additional departments are needed for the work foreseen under Outcome 3 of this proposal. ABioSA III will also collaborate with sector specialists and technical assistance providers, who will be contracted in order to deliver on outputs.

The fundamental aspect of good collaboration is always good communication; therefore, the project aims at an open, transparent and clear form of communication with the key partners, other strategic partners and stakeholders. By putting emphasis on practical communication, the project team intends to implement simple interactions. This practice will help to visualize our understanding and increase transparency at operational project level, also for service providers which will be further discussed under section 5.3.

An important aspect of the project is to strengthen cooperation structures between the stakeholders. Existing structures are the starting point; from where we will facilitate the acquisition of knowledge and try to narrow cooperation and communication gaps at the system level. **Annexure A** describes the process that was initiated by ABioSA and UNIDO GQSP-SA in mapping the meso-level stakeholders within the biotrade sector in close collaboration with the **DFFE** and **the dtic** with the aim to create a more synergistic public and business support/meso-level landscape for enterprises to manoeuvre.

In this section specific mention is made of the other SECO funded sister projects and the BIA project coming to a close by end of April 2026. Continuous engagement to reflect on synergies and potential overlaps between ABioSA and these projects are needed to ensure no duplication takes place and collaborative initiatives are identified. The section below provides the areas of collaboration and a summary table indicating the linkages between the various projects’ activities within the SECO biotrade portfolio.

UNIDO GQSP and ABioSA III collaboration
UNIDO GQSP and ABioSA have a longstanding collaboration focusing on creating broader awareness and collaboration among the stakeholders and BSOs through the joint hosting of the biotrade stakeholder forum as one of the platforms under the ABioSA Knowledge Management ecology describe under section 5.3 below. During the Quo Vadis period, collaboration with GQSP focused on further evaluation of the Biotrade Stakeholder Forum, the potential collaboration on SMME support based on the analysis mentioned under Outcome 1. Additional collaboration looks at the strengthening of biotrade-based associations through a critical evaluation being conducted linking directly with ABioSA outcome 2 activities.

SIPPO & ABioSA III collaboration

SIPPO and ABioSA successfully collaborated during ABioSA Phase II on supporting capacity building and knowledge transfer to SMMEs in the biotrade sector, including during a DFFE/ABioSA SMME breakfast to create awareness of the ABF, with SIPPO international expert Gustavo Ferro presenting on export readiness.

In preparation for ABioSA phase III the two projects identified five collaboration areas. These areas were identified during the ABioSA Quo Vadis phase which coincided with SIPPO's end of phase and preparation for their next phase which falls within the same timelines as ABioSA phase III. The alignment of ABioSA and SIPPO on project timelines ensures that the realisation of the joint activities is more streamlined. The five areas identified directly linking to Output 2 include:

1. Leveraging the specie associations for marula, honeybush and buchu as new actors under SIPPO phase III for capacity development and collaboration opportunities in line with SIPPO's key priority areas being:
 - Marketing and promotion (which includes export promotion activities such as trade fairs, selling missions, buyer missions, etc)
 - Compliance and certification
 - Market intelligence

These areas also align with the two of our SDP pillars namely; 1) legislation and compliance and 2) Market access and generic marketing. This will assist sector associations to diversify their resource support for the implementation of the SDP outside of ABioSA.

2. To strengthen the network and cooperation between biotrade sector associations (ABioSA/SIPPO BSOs) with the BSOs of the export markets of biotrade ingredients and final products for food, supplements, cosmetics, health and cosmeceuticals internationally and with a local footprint (i.e CECOSA, SAAFFI etc.)
 - a. This will help biotrade sector associations to better understand export/end-market requirements, compliance issues etc.
 - b. The end market BSOs to understand the biotrade BSO challenges and solutions better
3. Regulatory compliance information and intelligence – through the biotrade prioritised specie VC table identify challenges and solutions in terms of regulatory compliance for each end market served
 - a. Analyse the regulations and compliance for each VC and identify areas that can be supported by partner organizations such as SIPPO etc.
4. Organise and host knowledge transfer workshops based on needs identified in collaborative SECO-funded projects
5. Jointly develop a follow-up Knowledge Product on Market Access/Trade Fairs etc.

SSAIP and ABioSA phase III collaboration

SSAIP and ABioSA have collaborated on several initiatives in 2024 and in 2025 during the ABioSA Quo Vadis year. These included peer-to-peer learning workshops with BSOs from four different countries in the marula value chain; learning and awareness raising and supporting efforts towards Geographical Indications (GI) activities as identified in the SDPs for Marula and Honeybush, such as through attending international workshops like the Worldwide Symposium on Geographical Indications. The work on GI serves to strengthen synergies between SSAIP and ABioSA with regards to supporting initiatives for enhancing

market access and demonstrates the cumulative effect SECO-supported projects in the biotrade portfolio can have in advancing sector collaboration and development.

As part of ABioSA phase III, the project plans to build on the experiences and successful collaboration with SSAIP to together support sector collaboration, host workshops and engagement sessions to raise awareness on GIs and their benefits as market access tools. The project also plans to partner with SSAIP on joint communication, training and capacity building events, and peer to peer exchanges based on stakeholder needs. These could include specialized support to sector organisation on patent law and practice and enhancing competitiveness from new AI tools such as BioInnovation Monitoring Tool (BioMoT) directly linking to Outcome 2 of ABioSA.

Potential collaboration between IDDRI and ABioSA phase III

The Institute for Sustainable Development and International Relations (**IDDRI**) and ABioSA are exploring potential cooperation opportunities for the next phase of the project. Although IDDRI is still formulating its strategic direction with regards to the bioeconomy, the below provides a very high-level description of the areas the two projects are considering for potential collaboration.

- Bottom-up led multisectoral collaboration → possible learnings on the role of the sector development plan approach used by ABioSA.
- Enabling environment – links to the ABioSA macro-level which looks at supporting government to create an inclusive enabling environment for biotrade.
- Support south to south dialogue and exchange events

BIA legacy carried into ABioSA phase III

ABioSA and BIA-SA has been operating as “two sides of the same coin” over the last few years. However, at end-April 2026 the BIA project comes to an end, with an opportunity for ABioSA to carry some BIA activities into its Phase III.

The synergies were already identified during the ABioSA Quo Vadis year and include the following:

BIA received top-up funding to demonstrate pathways for a blended finance approach.

1. Through the Financial Instrument study in South Africa and Namibia, BIA has gathered data and information on institutions and instruments available to the biotrade sector showing the availability and gaps of financing (financial supply-side). Similarly, ABioSA has gathered verifiable SMME and industry-wide (financial demand-side) information on the status and growth plans of selected/supported SMMEs, value chains and the whole bioprospecting/biotrade sector which has greatly influenced Outcome 1 of the project.
2. The BIA SA-EU partnership model has been integrated into the Meso-level support model for ABioSA phase III under Outcome 2.
3. The BIA financed IT / AI based BioMot Market intelligence tool to globally monitor commercially oriented research and intellectual property activities in relation to South African biotrade resource will be of use in implementing and as appropriate adapting the ABioSA supported SDPs under Outcome 2.
4. The BIA ABS-collaboration support provides the basis for the 4-tier ABS approach under Outcome 3.

5.2.4 Procurement and contracting

Procurement of supplies and services shall be implemented according to the GIZ's internal rules and regulations for procurement and contracts, including national and international competitive bidding when relevant. GIZ will sub-contract external experts to deliver on project activities such as studies, knowledge projects, capacity development and coaching and other technical assignment to ensure the most economic and efficient delivery of the project. For procurement of supplies and services with a strategic relevance to the project, and above EUR 100,000 GIZ will work in close consultation with SECO to reach mutual agreement on the tender documents such as terms of reference (ToR) and the evaluation report, these ToRs shall be developed in consultation with DFFE.

The first six months of the project phase III will again focus on establishing all long-term contracts required to ensure smooth implementation throughout the project duration.

- Prioritise the tender and procurement processes of larger/longer term service provider contracts, calls for technical and/or financial proposals targeting individual SMMEs, industry and BSOs to accelerate implementation.
- The following aspects will form an intrinsic part of all tender processes:
 - Compulsory information sessions for all calls for proposals and tenders to ensure critical areas of importance are presented and will be addressed.
 - Each call will require a proof-of-concept document in the form of a mini "Theory of Change"
 - Each call will require bidders to provide reference letters from previous clients/customers.
 - Ensure that each project/initiative/assignment includes cyclical M&E and learning that allows for a pause point to re-assess the direction and appropriateness of the initiatives' direction and ensure systemic insight and change.

5.2.5 Project budget summary

A budget of 2,5 million CHF has in principle been approved for phase III, using an exchange rate of 1 EUR = 0.95 CHF (set in 2025) the project has a budget of EUR 2,631,578. The available budget has been allocated according to the GIZ budget lines in order to best implement the 3 outcomes as well as management activities.

Project budget 2026 - 2028 in EUR							
Code	Report	Total Budget in CHF	Total Budget in EUR	Budget per outcome			
				Outcome 1	Outcome 2	Outcome 3	Proj man
1	Staff, GIZ Internal Services, Consultants	1.451.433	1.527.825	356.254	300.659	361.601	509.310
1,1	Staff and volunteers	718.854	756.688	160.282	160.282	218.062	218.062
1,2	GIZ internal services	220.870	232.495	58.124	58.124	58.124	58.124
1,3	External expertise	511.710	538.642	137.848	82.254	85.416	233.124
2	Travel Costs	61.750	65.000	14.900	14.900	15.200	20.000
2,2	Travel local staff	47.500	50.000	12.500	12.500	12.500	12.500
2,3	Travel staff in HQ	14.250	15.000	2.400	2.400	2.700	7.500
3	Procurement	11.400	12.000	3.000	3.000	3.000	3.000
3,1	Material & equipment	11.400	12.000	3.000	3.000	3.000	3.000
4	Financing agreements	408.500	430.000	180.000	250.000	-	-
4,1	Grants to partners	237.500	250.000		250.000		
4,2	Local subsidies	171.000	180.000	180.000			
5	HCD participants related costs	1.900	2.000	1.000	1.000	-	-
5,1	Participant related costs	1.900	2.000	1.000	1.000		
6	Other direct costs	294.999	310.525	58.790,03	49.713,63	59.087,26	142.934,36
6,1	Other direct costs HQ	3.232	3.402	885	510	544	1.463
6,3	Running costs local	71.820	75.600	19.656	11.340	12.096	32.508
6,4	Other services	148.916	156.753	18.809	26.648	34.484	76.812
6,5	Other costs and incomes	71.032	74.770	19.440	11.216	11.963	32.151
7	Total direct costs	2.229.982	2.347.350	613.943,92	619.273,00	438.888,65	675.244,22
	Overheads (incl. the statutory reserve)	267.668	281.755	73.256	42.263	45.081	121.155
	VAT adjustment	2.349	2.473				2.473
	Accrued interest						
Total		2.500.000	2.631.578	687.200	661.536	483.970	798.872

*CHF-EUR exchange rate of 0,95 as applied by SECO

Table 3: Indicative project budget in CHF and Euros.

Budget notes

Most of the budget lines in the above-mentioned budget are self-explanatory and do not require further clarification. However, this section aims to provide a more detailed description per outcome around the following budget lines:

1.3 External expertise

4.1 Grants to partners

6.4 Other services such as training, workshops and other events.

Code	Budget line description	Budget (€)
Outcome 1		€ 338 848
1.3	External expertise	<u>137 848</u>
	Profiling and business mentoring support to pipeline of selected SMMEs and vetted referrals to other BSOs	137 848
4.1	Grants/Local Subsidies to Partners	<u>180 000</u>
	Financial support to category 3 and 4 of the SMME pipeline	180 000
6.4	Other services	<u>21 000</u>
	Training/learning/dialogue workshops to category 1 and 2 of the SMME pipeline	21 000

Outcome 2		€ 363 754
1.3	External expertise	<u>82 254</u>
	Support industry associations to facilitate the implementation of sector/landscape development plans	67,077
	Moderation of the SDP implementers' peer learning events	15,177
4.1	Grants to partners	<u>250 000</u>
	2 association agreements based on existing SDPs	100 000
	3 new collaboration agreements based on sector/landscape development plans	150 000
6.4	Other services	<u>31 500</u>
	Peer learning workshops and dialogue for SDP implementers	31 500
Outcome 3		€ 126 616
1.3	External expertise	<u>85 416</u>
	Support inclusive strategy implementation with government to create an enabling environment for biotrade	70,239
	Moderation of the ABS peer-to-peer learning events	15,177
6.4	Other services	<u>41 200</u>
	Inter-departmental, regional and South-2-South peer learning engagements	41 200
Management		€ 323 124
1.3	External expertise	<u>233 124</u>
	Project monitoring, evaluation and KM	99 019
	Marketing and communication (incl. website hosting and maintenance)	114 046
	ABF 2027 service contract	15 000
	ABioSA Annual PSC moderation	5 060
6.4	Other services	<u>90 000</u>
	ABF 2027 logistics and participants costs	15 000
	ABioSA Annual PSC events logistics and stakeholder participation	75 000

5.3 Insight and change management

These set of modalities and tools do not only focus on performance and achievement of outputs, outcomes, impacts but also contribute towards **systemic insight and change** and to achieve sustainability and continuity within the biotrade sector.

5.3.1 Knowledge management approach

The KM approach for ABioSA III builds directly on the foundations of Phases I and II, while adapting to ensure stakeholders can continue collaborating well beyond the lifetime of the project. Earlier phases established key successes: KPs were not ends in themselves, but vehicles for engagement and dialogue. SDPs and other structured platforms brought government, BSOs, SMMEs, traditional knowledge holders, and communities into joint analysis, creating shared direction and a credible base for sector growth.

Phase III shifts emphasis from creating reference points to embedding KM as a living practice and positioning it as a continuity commitment rather than a static legacy.

Existing anchors—such as SDPs, the Biotrade Stakeholder Forum, and BioPANZA clusters — remain central. What changes is how they are used: processes and sessions are now designed to distribute sense-making and agency. Practical KM scaffolds such as shared templates, convening cycles, and facilitation methods, equip stakeholders themselves to host, adapt, and renew these spaces without reliance on external facilitation.

The Knowledge Ecology in ABioSA III combines two interlinked elements being the **KM framework and KM system**.

The **KM Framework** provides scaffolds such as SDPs, the ToC, and engagement platforms—structures for cooperation and problem-solving by stakeholders that enable common ground, bridge boundaries, sequence processes, and reinforce shared knowledge and learning. These scaffolds activate an environment for engagement in different ways. Some create common ground and shared direction (like SDPs that give everyone a reference point). Some support deliberation, consultation, and negotiation (like templates or dialogue tools that help people work across different perspectives). Some guide planning and sequencing (like calendars of forums, working groups, and review sessions that map out when and how stakeholders come together) And some reinforce learning and practice over time (like concept notes or glossaries that help keep shared language and insights alive). These scaffolds make collaboration visible, structured, and easier to carry forward as part of the sector’s own capability.

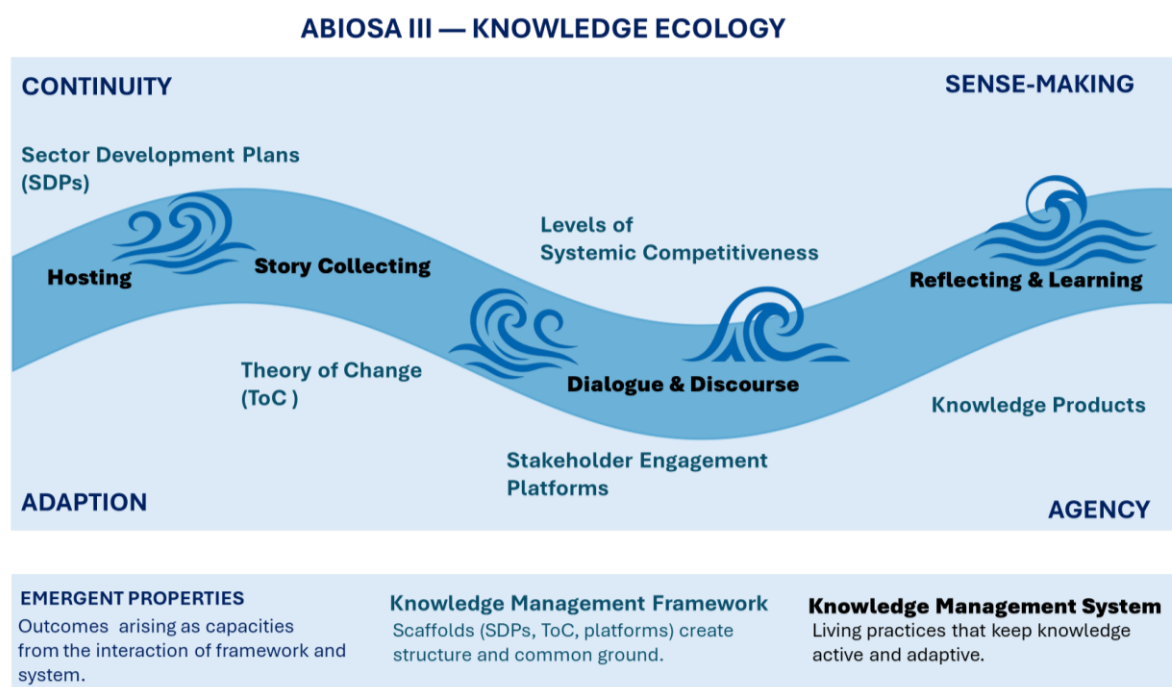


Figure 5: ABioSA phase III KM ecology

The **KM System** animates these scaffolds through living practices of hosting, dialogue, reflection, and story-collecting, ensuring that knowledge remains active, adaptive, and owned by stakeholders themselves. Like currents in a river system, the flows show

how knowledge in ABioSA moves, loops, and gathers strength—turning scaffolds and systems into a living ecology that sustains continuity, adaptation and agency. From the interaction of framework and system, emergent properties arise—continuity, sense-making, adaptation, and agency—that extend beyond any single intervention. Together these create the Knowledge Ecology: a living system that generates the conditions for stakeholders in the sector to sustain collaboration, renewal, and shared direction.

The Knowledge Ecology is an integral part of ABioSA’s overall management approach. Within the modality of *insight and change management* (section 5.3), the KM Framework and System connect directly with M&E, risk management, communications, and events. Just as finance/budgeting or HR management provide stability for implementation, KM provides the adaptive scaffolding that turns evidence into insights, insights into learning, and learning into renewed cooperation.

Monitoring and Evaluation (M&E) in ABioSA has always gone beyond tracking results. In Phase III, the shift is that M&E is fully embedded within the KM ecology—working with signals, stories, and data to guide navigation. The system side keeps knowledge alive through ongoing flows—story collection, mentoring, and feedback loops—that distribute sense-making and agency across all levels of the systemic competitiveness framework. Together, framework and system ensure that collaboration is no longer dependent on external facilitation but becomes a living practice owned, adapted, and renewed by stakeholders themselves in order for the project to achieve its sustainability and long-term value creation derived from the three outcome areas:

1. *Leaving behind a functional and tested assessment and referral tool, and SMMEs able to access blended finance at the end of the project phase, will create a sustainable environment for a healthy biotrade ecosystem to build on.*
2. *Leaving behind coordinated and aligned sector actors with defined strategic plans for specific value chains enabling actors to leverage sector-wide interventions to enhance participation and raise competitiveness.*
3. *Leaving behind a strengthened institutional network equipped with tools at the end of the project phase to maintain exchange, learning and continuous improvement of systems*

This balance between framework and system is what makes the KM Ecology distinctive. Within project management, KM is positioned as an insight and change core modality because of its direct touchpoints with M&E, learning, risk management, and communication. Evidence from M&E is structured through KM into usable insights; and learning translates them into adaptive practice. The Steering Committee is supported in safeguarding independence and distributed ownership of the KM system, ensuring that administration and cooperation become embedded within sectors themselves. In this way, ABioSA’s sustainability and long-term value creation is not a set of documents or platforms, but a living practice of collaboration—carried forward by SMMEs, BSOs, communities, traditional knowledge holders, and government

partners. It is a system owned, hosted, and renewed by stakeholders themselves, ensuring the biotrade sector continues to adapt, connect and grow well beyond the life of the project.

5.3.2 Events/workshop/peer learning platforms

As illustrated in the KM Ecology diagram, events, workshops, and peer learning platforms are the visible scaffolds within the KM Framework—regular points where the sector comes together. Their real value is that they do not remain just meetings: once animated through the KM System they become living spaces of dialogue and reflection where new insights surface, differences are explored, and cooperation is renewed. In this way, they create the conditions from which emergent properties of the Knowledge Ecology—continuity, adaptation, agency, and sense-making—can take root. These outcomes do not arise automatically; they are cultivated through scaffolding and flows working together. The KM System is generative in this process: it transforms events into mechanisms that produce new insights, reinforce trust, and sustain collaboration beyond project funding. They amplify learning across levels, accelerate feedback, and give visibility to the sector's progress and challenges in ways that individual actors could not achieve alone.

The following events illustrate how scaffolds work across systemic levels—moving from micro-level testing, to meso-level peer learning, to macro-level patterning, and into sector-wide, continental, and governance platforms:

- **Micro-level:** Training and dialogue workshops for the SMME pipeline act as testing grounds where new tools and approaches can be tried. These serve as safe-to-fail probes, allowing lessons to be quickly reflected on and fed back into practice.
- **Meso-level:** Peer learning sessions with BSOs, run in collaboration with SIPPO and SSAIP, bring implementers together to exchange early lessons and compare experiences. In doing so, they surface weak signals and build stronger pathways for effective SDP delivery.
- **Macro-level:** Inter-departmental, regional, and South-to-South exchanges widen the lens, turning scattered experiences into shared patterns. Through narrative clustering and collective reflection, they guide adaptive governance across institutions.
- **Biotrade Stakeholder Forums (with GQSP):** provide a sector-wide spotlight where stakeholders converge, compare progress, and set direction together.
- **ABF 2027 (under the BioPANZA tri-party):** creates a continental stage for exchange and positioning, linking Southern Africa into a wider African biotrade conversation.
- **Annual ABioSA PSC meetings:** ensure strategic alignment while reinforcing distributed ownership and accountability across the programme.

Together, these scaffolds bring the management modality of Insight and Change Management (5.3) to life. They are the moments where evidence from monitoring is interpreted, peer learning activated, and adaptive practice tested. They also link back

into the wider management architecture—drawing on planning frameworks, supporting governance and financial management, and feeding into communications and flexible risk management. By design, the generative KM Ecology creates the conditions for emergence: shaping the dispositions for continuity, adaptation, agency, and sense-making so that events become more than convening moments—they are mechanisms that can sustain collaboration and renewal well beyond the timeframe of ABioSA III.

5.3.3 Monitoring and Evaluation (M&E)

The logframe as basis of the results-oriented monitoring (ROM) system is based on the theory of change and is a visual tool to show what the project is doing, and what it would like to achieve. The different elements of the logframe clarify the logical thinking behind the project, by showing how inputs will be utilized to realise activities that will lead to outputs, outcomes, and eventually development impact/objective.

Within the KM ecology ROM is not only about accountability; it acts as a living scaffold that supports collective sense-making and adaptive navigation. Monitoring and Evaluation (M&E) in ABioSA has always gone beyond tracking results. In Phase III, the difference is that M&E is now part of the Knowledge Management (KM) ecology. This means it focuses on linking data with stories and early signals, so that partners can see what is emerging, learn together, and adjust direction with confidence.

The ROM process will include a systematic assessment of the project's performance over time that will involve the ongoing collection and review of progress data. In the KM ecology, indicators are not static measures; they are interpreted through evidence, stories, and weak signals from practice, allowing the project to notice patterns and adjust pathways.

In order to put learning and adjustment in the centre of the change initiative, monitoring and management functions need to be integrated to allow for decision making that is based on facts and current realities and needs. Here, KM scaffolds (grounded, suspended, panel, reinforcing) act as supports that place monitoring data into context - linking facts with stories and patterns so information can be turned into timely decisions, while reducing duplication and confusion across partners.

The ongoing ROM of activities will be supplemented by an annual participatory evaluation with partners taking place at a particular point in time during the annual ABioSA PSC meetings. In the KM ecology this acts as a “suspended scaffold”: a deliberate pause to compare current reality with intended pathways, notice emerging patterns, and choose the next wise step rather than fixating on a final destination. This *Quo Vadis* process offers in-depth assessments of relevance, efficiency, effectiveness, impact, and sustainability at a given point in time, guiding adjustments where needed. It is essentially a formative check-in to compare project reality with the ToC - asking: where are we now, what is emerging, and what makes sense to do next?

During the implementation of the last two phases under the function of M&E, valuable baseline data has been gathered both on an individual SMME level as well as on a sector-specific level through the SDP process. The BioTrade Principles and Criteria developed by the BioTrade Initiative of the United Nations Conference on Trade and

Development (UNCTAD) was used as a basis for this data gathering. The 7 BioTrade principles were used, closely aligned with the ABioSA project objectives as illustrated in the table below.

ALIGNMENT: BIOTRADE PRINCIPLES & ABIOSA OBJECTIVES		
UNCTAD BIOTRADE PRINCIPLES		ABIOSA OBJECTIVES
Clusters in M&E framework		Aligned with:
1.	Conservation of biodiversity	• Convention on Biological Diversity (CBD) • Sustainable use of South(ern) Africa's plant biodiversity
2.	Sustainable use of biodiversity	
3.	Fair and equitable sharing of benefits derived from the use of biodiversity	
4.	Productive, financial, market & socio-economic sustainability	• Contributes to livelihoods of rural people • Supports sustainable development goals • High-growth, jobs-rich, innovative biotrade sector compliant with national ABS regulations
5.	Compliance with national and international legislation	

Also covers the following BioTrade Principles:	
6.	Respect for the rights of actors involved in BioTrade activities
7.	Clarity about land tenure, use and access to natural resources & knowledge

The intention is to further build on the data gathered to strengthen the basis from which to build and grow the sector. In the KM ecology, this becomes part of a reinforcing scaffold: institutional memory and shared terminology that endure beyond the project while staying flexible to new realities. True to the systemic competitiveness framework approach the ABioSA project is not only striving for direct impacts but also contributes to **systemic insight and change**.

Here, M&E interacts with KM as a panel scaffold: sequencing evidence, lessons, and stories over time to reveal trajectories and options for the sector. Systemic change often has a greater impact than direct assistance as even people and companies with no immediate contact with the project will benefit indirectly. For example, a registration of marula as a novel food creates European market access for SME's not being directly supported by the project. This substantiates the sector-wide support and assistance described in the Phase III components.

5.3.4 Flexible risk management

The ABioSA project' understands the importance of flexibility within risk management. It understands that risk and innovative problem-solving opportunities, even within the context of development cooperation sustainability measures, are often two sides of the same coin. Risk management has been built into the design of Phase III with the recognition that risk is inevitable. What matters is how the project treats risk as a chance for learning, problem-solving, and adjustment, rather than only as a threat to be controlled. In complex environments, risk is never about rigid prediction but about staying alert, noticing signals early, and testing small responses that can be adapted as needed.

In this light, risk management becomes an opportunity for the biotrade ecosystem to learn how to solve problems together and how on-going learning occurs. This is not just a technical task—it is part of the Knowledge Management (KM) ecology where monitoring, stories, and data are scaffolded into shared narratives that allow stakeholders to notice patterns, test responses, and build adaptive capacity. This is seen as an opportunity to build trust, strengthen social and informal networks, and manage formal relationships between stakeholders at the different levels. Within the modality of **Insight and change management** (section 5.3), flexible risk management connects directly with the KM framework and system, M&E, communications, and events that together create the project's living feedback system.

Flexibility is emphasised to ensure the impact planned for the project is closely linked with emerging risks. This means risk practices will be embedded in phased, iterative cycles where insight and change management modalities provide structured pauses for reflection, enabling the project to re-assess pathways as conditions shift.

1. The KM ecology mentioned in section 5.3.1 will help project partners look at risks and constraints together and explore options for how to respond. Some tools create common ground, others help to surface tensions, some give a step-by-step view of possible responses, and others capture lessons so they can be carried forward.
2. The **Quo Vadis** time-bound check-in annual process to monitor whether risks that have been identified through the above-mentioned process have been dealt with to ensure project reality still reflects the ToC.
3. The project's governance process is designed to manage risk. The three partners will be immediately engaged regarding risks that require responsive decision making either through the two standing meetings within a year or the calling of an ad hoc meeting in the event that any risk identified that requires immediate attention.

The following risks have been identified and mitigation measures proposed during the implementation of Phase III, to be assessed during the three processes mentioned above. These are not fixed predictions but working assumptions that will be revisited through the three processes mentioned above (KM ecology tools, Quo Vadis check-ins, and governance reviews). In this way, the matrix serves as a shared starting point that evolves as new signals and feedback emerge.

		Impact			
		Acceptable Little or no effect	Tolerable Effects are felt but not critical	Unacceptable Serious risk to continuity	Intolerable Could result in a disaster
Likelihood	Improbable Risk unlikely to occur	1. End of collaboration between public and private sector willing to		2.SMMEs not able to adhere to requirements of the	

		participate on ABS		financing agreement	
	Possible Risk will likely occur		3.Political environment deteriorates.		
			4.Non-tariff and tariff barriers in target markets tighten to restrict new products from emerging markets.		
	Probable Risk will occur		5.Co-funding towards the BioPANZA clusters is not consistent.		

Table 4: Working document of risk matrix assessment that may change as more is learnt about the risk impact or likelihood based on feedback from other processes mentioned above.

The following guiding questions assisted with finding a mitigating plan to deal with these risks; and will also be used during the implementation period of the project to check whether risks have shifted, new risks have emerged, or earlier risks have reduced in significance.

In this way, risk tracking remains connected to learning rather than only control.

- How can mitigation measures be implemented into the project activities and processes?
- Is the plan clearly stated so that anyone can understand what action needs to be taken for each risk event?
- Is this action plan an appropriate level of response for this risk?

The current mitigation measures are projected to combat the risks identified:

Risk	Mitigation
1.Cease of collaboration between public and private sector willing to participate on ABS.	Address meta-level issues such as trust and collaboration to discuss differing views around ABS through Outcome 3 in order to get public and private sector to come up with joint solutions.
2.SMMs are not able to adhere to the requirements of the financing agreement	Due diligence verification of SMMs, and ensuring the “skin in the game” principle is applied, will mitigate most of this risk
3.Political environment deteriorates, relationship between DFFE & DSTI worsen.	Address areas where there is agreement between the two departments first in a

Risk	Mitigation
	collaborative approach and specify means of collaboration in the partner MoU/MoA
4.Non-tariff EU barriers in target markets tighten to restrict new products from emerging markets.	Support is offered to regional SMMEs to also respond to local and regional markets.
5.Co-funding through government departments towards the BioPANZA clusters is not consistent.	Investigate if the BioPANZA clusters could function as virtual/rotational coordinating structures where each department can maintain control over their own funds but still contribute

5.3.5 Marketing and communication

From the outset, ABioSA has treated communication and marketing as core functions, not as add-ons. In Phases I and II, they helped make South Africa's biotrade sectors visible and credible: translating complex issues into accessible language, building confidence among stakeholders, and creating entry points into policy and market debates. Communication provided a shared reference point within each sector, while marketing positioned enterprises and products in ways that built trust with regulators and buyers. Together, these efforts supported more coherent voices within sectors and set the ground for possible cross-sector exchange.

Phase III builds on this foundation but takes the role further. Communication and marketing now form part of the Knowledge Management Ecology—not only shaping visibility but also creating flows of meaning and connection across institutions, sectors and value chains. In this framing, they are strategic enablers of systemic competitiveness: lowering the cost of coordination, turning lessons into shared direction, and aligning diverse efforts at micro, meso, macro, and meta levels.

The distinction in Phase III is that:

- Communication becomes more than information flow: it works as a living process that surfaces signals, lessons, and stories from sectoral work and connects them into a wider conversation. *For example, a processor's success in meeting export standards can be shared as a story that informs both other SMMEs and policymakers.*
- Marketing continues the work begun in Phases I and II - where products and enterprises were given visibility, credibility, and market entry points - and extends it towards strategic positioning. This means highlighting the value of biotrade products in relation to sustainability, compliance, and innovation, and amplifying narratives that strengthen credibility in both policy and market arenas. *For example, building on earlier efforts that helped rooibos or marula oil enter markets as compliant products, Phase III can frame them as part of a South African sustainability brand that attracts buyers and investors.*

Communication and marketing have already played an important role in ensuring that sector progress was made visible and could be shared beyond immediate project partners. In Phases I and II, briefs, photography, films, events, and media coverage helped enterprises and associations gain credibility and positioned them in broader debates. Phase III builds on this by expanding the range and reach of formats—such as podcasts, blogs and interactive media—so that stories and lessons travel further, generate dialogue within sectors, and foster greater resonance with policy, markets, and the wider world.

Placed within the KM Ecology, communication and marketing act as scaffolds: they provide frames for shared perspectives, bridge knowledge worlds, structure stories over time, and reinforce collective memory. In practice, this means they will:

- Make small changes visible - highlighting early signals so they can spread.
- Strengthen connections - reducing effort for stakeholders to find each other and engage productively.
- Build trust - through open sharing of risks, challenges, and successes.
- Reinforce shared purpose - ensuring consistent narratives that align diverse efforts.
- Position the sectors - animating their strengths in ways that influence markets, policy, and investment.

The Phase III strategy will be co-designed as part of the KM system. Its role is not only to showcase results but to act as:

- A mirror, reflecting back what has been learned and achieved within sectors; and
- An amplifier, carrying insights and narratives into the wider ecosystem to influence policy, attract support, and inspire action.

By animating the KM Ecology with evidence and stories, communication and marketing become a living flow in ABioSA Phase III - turning sector-based experiences into shared narratives that sustain participation, visibility and competitiveness well beyond the project phase.

6. Programme contributions

6.1SECO country strategy

ABioSA contributes towards the SECO country strategy for South Africa 2025 - 2028 - working towards a more competitive, sustainable and inclusive urban economy. The project contributes specifically towards the following SECO goals:

- Innovation-friendly business environment
- Market-oriented skills
- Access to finance
- Integration in value chains

Through the implementation of the ABioSA phase III logframe objectives and outcomes the project contributes towards the following SECO standard indicators (SI) also highlighted in **Annexure B: ABioSA logframe**.

ALIGNMENT: SECO STANDARD INDICATORS & ABIOSA OBJECTIVES AND OUTCOMES			
SECO STANDARD INDICATOR		ABIOSA OBJECTIVES AND OUTCOMES	
SI 4	Measures for improving institutional and professional capacity/skills including for climate.	Outcome 2	Number of capacity-building or networking initiatives held for industry associations and BSOs
SI 12	Number of companies or producers (disaggregated by gender) with access to capital	Outcome 1	Proportion of financed and trained SMMEs (disaggregated by gender) achieving ABS compliance, market access and/or new markets
SI 15	Number of producers or companies (disaggregated by gender) with access to markets or value chains	Intermediate Outcome Indicator 1	Number of new buyer agreements or export deals (disaggregated by gender) signed by SMMEs
		Outcome 1	Proportion of financed and trained SMMEs (disaggregated by gender) achieving ABS compliance, market access and/or new markets
SI 16	Increase in trade volume of (sustainable) commodities, products or services in USD (national and international trade separately)	Intermediate Outcome Indicator 3	Annual % increase in the export value of priority biotrade products (disaggregated by product type and by programme-supported SMMEs)

Additionally, ABioSA intends to address the SECO cross cutting areas as follows:

6.1.1 Gender mainstreaming

ABioSA conducted a gender analysis during phase II, which highlighted the gendered nature of biodiversity activities, how gender is considered in policies, initiative and programmes in the sector, and identified opportunities within the project for accelerating progress for biodiversity and gender inequality. The recommendations of the analysis have been applied within the log-frame on all three levels of the systemic competitiveness framework. The gender lens is seen as integral to enhancing the ability of partners and key stakeholders to respond appropriately to the different variables that affect men and women in the biodiversity value chains.

ABioSA addresses gender mainstreaming on three levels:

- Mainstreaming of the gender dimension in all of its activities.

- No development activities support factors that unintentionally perpetuate or reinforce gender inequalities
- Promoting gender equality enhances productivity and competitiveness of individuals, companies and economies

6.1.2 Climate mitigation

The deterioration of biodiversity across the world due to human activity is increasing the speed of climate change. What we do in the next few years will determine the fate of biodiversity, life within our country and on earth. Stakeholders across the biotrade and bioprospecting value chains using indigenous natural products for medicinal, cosmetic, food, flavour, and nutraceutical purposes have a responsibility to contribute towards conservation and sustainable use which should lead to some extent to the mitigation of climate change. The reverse of the above-mentioned statement is also true in that the existence of local communities and companies depend on these indigenous resources and are at risk because of climate change. Within the context of ABS, local communities are seen as the custodians of these indigenous resources within their natural habitat (excluding private and state-owned land). ABS aims to ensure distribution of benefits from economic activities of these resources. Solutions to mitigate climate change should therefore include all actors within the value chain and be addressed both in terms of the resource in the wild and in its cultivated state.

Recent projects in the rooibos, baobab and the marula sectors have shown potential to sequester carbon at scale. When linked to sector level efforts, including through sustainable supply pillars, landscape impacts seem to become possible. Additionally, climate impact adaptations also seem to be under-explored possibilities through the scaled commercialisation of indigenous species better suited to soil and farming conditions subject to climate stress.

6.1.3 Economic governance

SECO's economic governance framework balances regulatory strength with incentives for responsible business conduct. It advances corporate governance and CSR, bolsters SME competitiveness and innovation, promotes long-term investment and financial stability, and aligns business integrity with inclusive growth and job creation.

ABioSA III integrates all these principles into the project design across all three project components. For example:

Output 1 seeks to create a pipeline of SMMEs capacitated to improve production, compliance, export capabilities and access to finance

In Output 2 associations are supported to enhance competitiveness of the sector companies

Output 3 supports efficient and effective regulation and transparency in the sector through communication and exchange between stakeholders.

6.2 GIZ GBF implementation programme

The ABioSA project phase III will contribute to the module objective of the global programme ‘**Strengthening the national implementation of the global biodiversity goals**’, which is:

- Selected partner countries are better able to implement their national biodiversity targets aligned with the Global Biodiversity Framework (of which ABioSA will become part of).
- In particular, contribution to module objective indicator 3, which “aims at partner countries having fed innovative, nationally tested approaches for improved adaptation and implementation of national biodiversity targets into existing international knowledge networks.
- ABioSA III will be incorporated as its own output area in the global project.

ABioSA output contribution towards the global project

Output 4 (SECO/ABioSA) Implementation of national bioeconomy strategies and ABS regulations has been improved, creating enabling conditions for inclusive partnering, and cooperation amongst biotrade value chain actors.	A pipeline of 70 well-supported and investment-ready small, medium, and micro-enterprises (SMMEs) that are focused on exports have improved compliance with Access and Benefit sharing. Baseline: 0 Target value: 70 Actual: 23 Target achievable in duration: yes	Database of selected SMMEs in the biotrade sector, selected by the bioeconomy reference committee, based on diagnostic assessment and referral report(s). Training and mentoring registers based on signed mentoring agreements. Evidence based on the mentored SMME journals Signed local subsidy contracts for financial and technical supported SMMEs (incl. community-based cooperations which is a legal entity within SA.
	5 sector and landscape plans that are funded and put into action; accessible resources to help provinces, nations, and regions (southern Africa) meet compliance, conservation, sustainable use, and benefit-sharing goals Baseline: 0 Target value: 5 Actual: 4 Target achievable in duration: yes	Letters of endorsement by industry stakeholders (value chain actors and supporters) of the updated or new Sector and Landscape Development Plans Official approvals or funding letters based on the evaluation committee feedback. Grant Agreement based on updated or new Sector and Landscape Development Plan proposals.

7 Annexures

- A. Systemic competitiveness framework
- B. Project logframe
- C. Project Steering Committee (PSC) rules and procedures

Background

Over the period of October 2019 – February 2020 a stakeholder mapping process was conducted to get a better understanding of what each organisation is doing, what its service offering is and to whom the services are targeted. For this to happen the meso-level organisations should work together effectively while pursuing different or complementary objectives. The challenge is to get the different meso-level organisations to pursue synergies, amplify knowledge spillovers and improve the overall dynamic between a wide network of meso-level organisations within the biotrade sector in order to respond to the needs of the biotrade SMMEs. For further information on this process visit the ABioSA [webpage](#) for the Stakeholder mapping case study as outcome of forums 6 – 8.

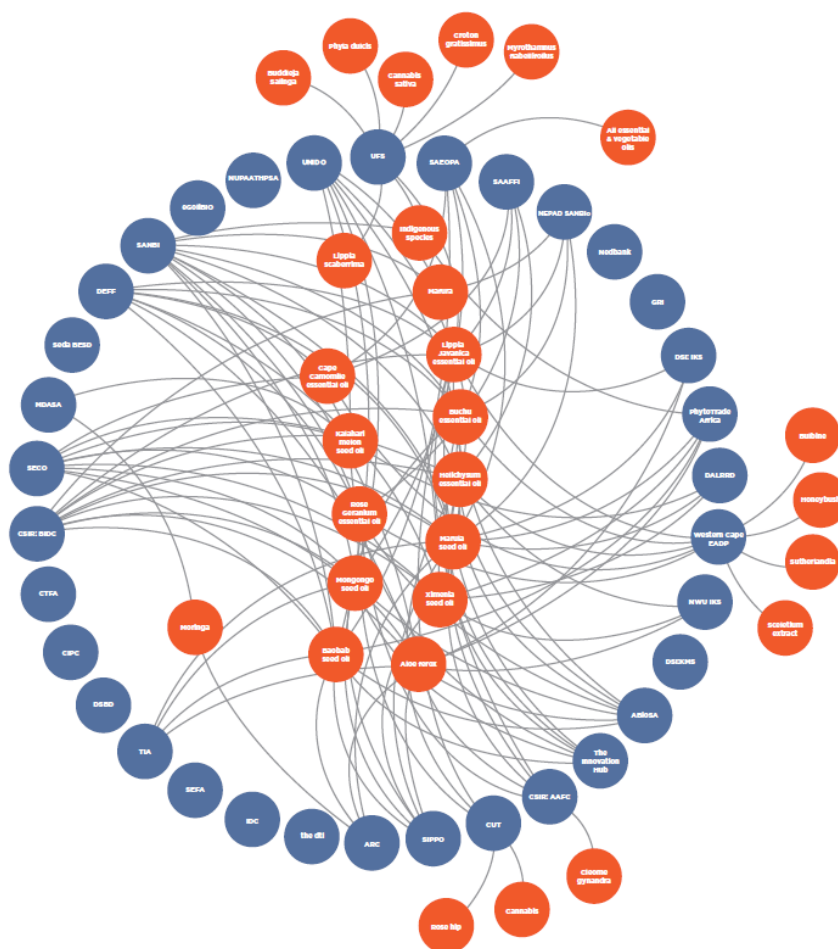


Figure 1: Biotrade stakeholder mapping according to the specie value chains.

The research and discovery costs in the biotrade sector are high and the costs to find the right service provider or BSOs increase when support offers are generic. The ability of the meso-level BSOs for dynamic response to changing or emerging new patterns appear to be low. It became evident during ABioSA phase I and II that very few organisations have the internal capacity to reflect and react on re-occurring problems of supported SMMEs that fell outside of their mandate and set indicators. If capacitated as outlined, these organisations can provide valuable information and support both in sector wide terms, and in areas specialised around specific markets, species or technologies employed.

Although it is recognised that both SIPPO and UNIDO GQSP are already working with specified BSOs it should be noted that in the case of SIPPO this support is limited to generic services along the last mile for BSOs in a wide variety of sectors of which biotrade is only one and that UNIDO GQSP supports specific laboratories focusing on quality tests and the Southern African Oil Producers Association (SAEOPA). Therefore, it would be important to ensure that a close collaboration between the sister projects takes place. ABioSA will focus its support to BSOs in the biotrade sector to increase market access for SMMEs, looking at focusing, improving and expanding the effectiveness of their offerings. In other instances, improving offerings may require the redesigning of specific services or making certain resources available.

The structuring of phase III outcome 1 and 2 in this proposal is an outflow of this thinking.

Systemic competitiveness framework

Sectoral competitiveness and economic growth within the broader national system traditionally focused quite narrowly on a few determinants of economic performance. The systemic competitiveness framework as referred to under section 4.2.4 (page 11) developed by Esser, Hillebrand, Messner and Meyer-Stammer (1995) concentrates on four social and economic levels and the way in which they inter-relate.

These levels are;

1. **Micro**: smallest level of economic activity consisting of enterprises, their organisational structures, how they interact with each other with the aim to achieve simultaneously efficiency, quality, flexibility and speed of response
2. **Meso**: where both public and private meso organisations at national, regional and local level become involved in promoting business, and where targeted meso policies, support initiatives and concrete projects are established to coordinate and promote sector advantages and increase relative competitiveness.
3. **Macro**: where pressure is exerted on the enterprises through performance requirements and policies across the economy.
4. **Meta**: which is made up of solid basic patterns of legal, political and economic organisation, and the adequate social capacity for organisation and integration and the capacity of the actors to achieve strategic integration.

Based on findings and experiences gained during Phase I and II the components have been revised to follow the competitiveness framework through the strategic organisation of the ABioSA resources and initiatives and building well-functioning collaborative networks. Traditionally initiatives and programmes mainly focus on inputs, outputs and direct impact, however the interactions among the stakeholders are as important as investments in outputs of activities to ensure systemic insight and change within the system. For this reason, the insight and change management modalities is key to implementation of the 3 outcome areas.

In Phase III, Knowledge Management (KM) becomes a cross-cutting enabler across all four levels. At the micro-level, KM helps SMMEs capture lessons from diagnostics and market experiments. At the meso-level, KM supports associations and BSOs to spot patterns and coordinate responses. At the macro-level, KM provides evidence to guide regulation and policy adjustments. At the meta-level, KM strengthens shared language, trust, and memory across government, academia, industry, and communities.

As noted under section 5.3.3 Monitoring and Evaluation (M&E): *“ABioSA is not only striving for direct impacts but also contribute to **systemic insight and change**. Systemic change often has a greater impact than direct assistance as even people/SMMEs with no immediate contact with the project will benefit indirectly.”*

Of specific interest to ABioSA is the dynamic interaction between all the stakeholders across the four levels of the competitiveness framework and especially how information flows, how problems are solved, how knowledge is generated, and how on-going learning occurs. Interaction between stakeholders at the different levels often is affected by issues such as trust, social and informal networks, formal relationships, common customers or common inputs and other factors. The insight and change modalities described in section 5.3 of the proposal is designed to specifically address this interaction and information flows at various levels.

KM is not just about storing reports. It makes learning visible, creates feedback loops, and gives stakeholders early warning signals so they can adjust direction. KM scaffolds continuity by ensuring that collective learning is not only documented but becomes part of how organisations work and decide.

This directly supports ABioSA's sustainability and long-term value creation — leaving behind not only tools and networks, but also an adaptive culture of collaboration

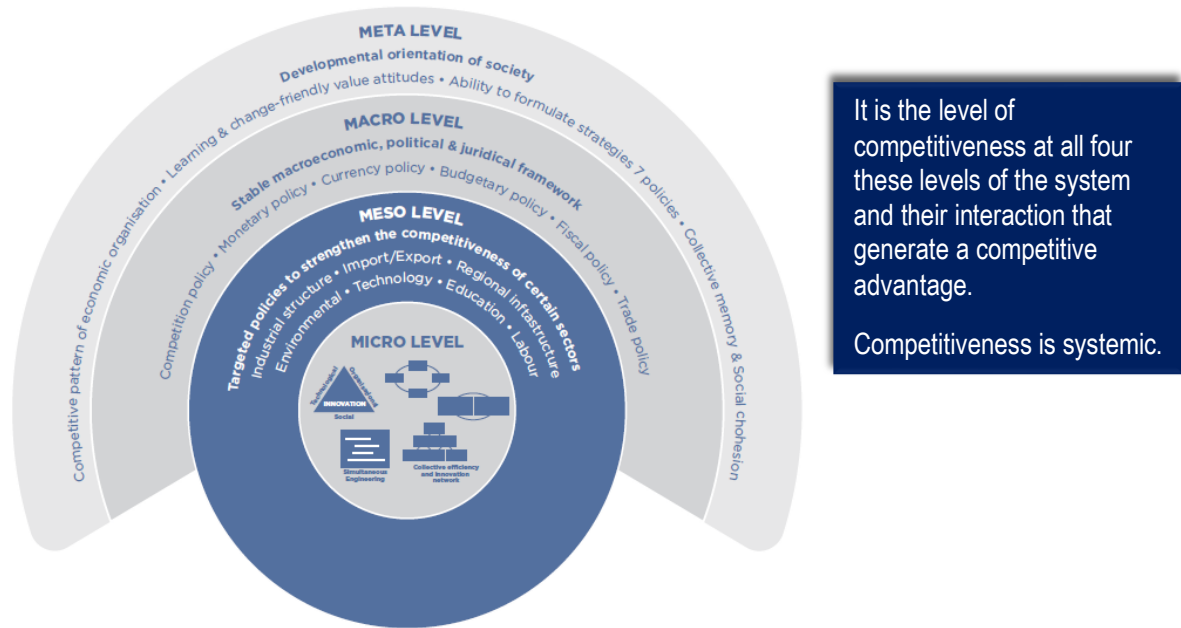


Figure 2: Systemic competitiveness framework

ABioSA in collaboration with other partners will therefore aim to bring together the different stakeholders within the framework including industry (SMMEs), government, academia and civil society to create synergies between the different parties and to support the creation of an enabling environment for the biotrade natural products sector with the ultimate mission to yield **a competitive, resilient, prosperous, inclusive, and sustainable ABS-compliant biotrade sector in southern Africa**.

The support to the pipeline of SMMEs, the SDPs linked to the BioPANZA clusters and government platforms to create conditions for inclusive partnering, and cooperation amongst biotrade actors will play a crucial part in this process to create reference points. Together, the KM framework and system ensure that collaboration is no longer dependent on external facilitation but becomes a living practice owned, adapted, and renewed by stakeholders themselves.

To strengthen this, Phase III will make deliberate use of simple KM scaffolds at different stages: grounded scaffolds (shared maps or perspectives that help create common ground), suspended scaffolds (sketches or objects that help people negotiate across differences), panel scaffolds (timelines or roadmaps that sequence collective action), and reinforcing scaffolds (glossaries or concept maps that sustain shared meaning over time). These are practical ways to carry learning forward and turn knowledge into capability.

In phase III the support directed to SMMEs takes place on all levels of the systemic competitiveness framework as described under section 5.1.2 of the proposal.

- **Outcome 1** SMMEs will no longer be supported on an individual basis but through the implementation of a programmatic approach implemented by a selected service provider to capacitate the pipeline of SMME within an enabling public and private

environment through a diagnostic assessment and referral tool to be applied – **micro-level**

- **Outcome 2** responds to SMME support needs – as was identified in the review of sector development plan process during the Quo Vadis – with a sector wide approach at the **meso-level** through associations and/or groups of SMMEs working together on the same value chains. In support of the programmatic SMME approach from outcome 1 the associations will collaborate with the selected service provider to support relevant SMMEs to raise awareness of sector-wide activities already addressed in the SPDs and what should be addressed on a company level. In return the service provider will update the associations on any new reoccurring patterns across the SMMEs within that value chain to be aggregated for sector-wide action. This ensures that there is a symbiotic relationship between the micro and meso level to create a private sector enabling environment that makes it easier for businesses to succeed.
- **Outcome 3** supporting government to create enabling regulatory conditions for inclusive partnering, and cooperation amongst biotrade actors and in so doing making access easier for SMMEs to increase production, exports, contribute to more equitable sharing of benefits for an ecological sustainable and equitable biotrade sector.
- **Insight and change modalities;** SMMEs are supported through stakeholder dialogue using KPs as a vehicle for problem solving and engagement with government, academia and others. Together, framework and system ensure that collaboration is no longer dependent on external facilitation but becomes a living practice owned, adapted, and renewed by stakeholders themselves in order for the project to achieve its sustainability and long-term value creation derived from the three outcome areas:
 - *Leaving behind a functional and tested assessment and referral tool and SMMEs able to access blended finance at the end of the project phase will create a sustainable environment to build on by a healthy biotrade ecosystem.*
 - *Leaving behind coordinated and aligned sector actors with defined strategic plans for specific value chains enabling actors to leverage sector-wide interventions to enhance participation and raise the competitiveness.*
 - *Leaving behind a strengthened institutional network equipped with tools at the end of the project phase to maintain exchange, learning and continues improvement of their systems*

The KM Ecology is designed as a living system that works with the ToC. By making patterns visible and feedback timely, KM helps amplify what works, adjust what doesn't, and open space for new opportunities.

Annexure B – Indicative Logframe

ABioSA Phase III Logframe/Impact Matrix			
Phase II timeframe: 01/01/26 - 31/12/28			
ABioSA MODULE OBJECTIVE:			
Foster a resilient, prosperous, inclusive, competitive, and sustainable biotrade sector in Southern Africa by enhancing SMME capabilities, strengthening sector coordination, establishing an enabling policy and regulatory environment, and promoting effective knowledge sharing. This will ensure equitable benefit-sharing and improved market access at local and international levels.			
Impact			
A competitive, resilient, prosperous, inclusive and sustainable Southern African ABS-compliant biotrade sector			
Indicators			
% change in the value of the biotrade sector in South Africa % change in biotrade export			
Means of verification			
National trade statistics			
External Factors (Assumptions/Risks)			
No major climate-related or geopolitical disruptions affecting production, harvesting activities or demand for biotraded products.			
Intermediate Outcomes			
1. Expanded local and international market access for southern African biotrade SMMEs	2. Increased production, exports and contribute to an ecological sustainable biotrade sector		3. Equitable sharing of benefits
Intermediate outcome indicators			
Number of new buyer agreements or export deals (disaggregated by gender) signed by SMMEs (SECO SI 15)	% increase in total production volumes for biotrade products among supported SMMEs.	Annual % increase in the export value of priority biotrade products (disaggregated by product type and by programme-supported SMMEs) (SECO SI 16)	Number of benefit sharing agreements signed between ingredient and end-user associations
Means of verification			
Supported SMME M&E reports.	SMME monitoring reports.	National trade statistics or industry association data	ABS Agreements
External Factors (Assumptions/Risks)			
None	No major climate-related or geopolitical disruptions affecting production, harvesting activities or demand for biotraded products.	Willingness of end-user companies (e.g. cosmetics, food) to engage in ABS-compliant sourcing and product development.	

1. MICRO LEVEL - Immediate Outcome				
Improved SMME compliance with ABS and market requirements in the biotrade sector				
Immediate outcome indicator				
Proportion of financed and trained SMMEs (disaggregated by gender) achieving ABS compliance, market access and/or new markets (SECO SI 12 & 15)				
Means of verification				
Training provider reports and SME funded close out reports.				
External Factors (Assumptions/Risks)				
SMMEs have co-funding and the ABS requirements do not prevent SMMEs to comply				
	Output	Indicators	Means of verification	Assumptions
Provides appropriate technical & financial enterprise support to SMMEs	1.1 Updated diagnostic assessment of selected SMMEs in the biotrade sector	70 SMMEs profiled through the diagnostic assessment and referral tool.	Diagnostic assessment report(s) Database of selected SMMEs in the biotrade sector Reference committee minutes	SMMEs in the biotrade sector respond to the call for participation from the Programme.
	1.2 A pipeline of SMMEs capacitated to improve production, compliance, export capabilities and access to finance.	20 SMMEs mentored and/or trained through blended technical assistance and finance by the ABioSA	Training and mentoring registers Mentoring journals Signed mentoring agreements Signed Local Subsidy contracts	There is a pipeline of export or near-export ready SMMEs who meet the qualifying criteria and are eligible for the programme in South Africa.
		50 SMMEs referred to other BSOs	BioPANZA & BSO referral reports	

2. MESO LEVEL - Immediate Outcome				
Improved and strengthened sector-wide coordination and coherent support services				
Immediate outcome indicator				
x Number of capacity-building or networking initiatives held for industry associations and BSOs (SECO SI 4)				
Means of verification				
Training registers, peer learning surveys and monitoring reports				
External Factors (Assumptions/Risks)				
The sector roleplayers remain willing to collaborate				
	Output	Indicators	Means of verification	Assumptions
Strengthens industry associations to facilitate the implementation of sector/landscape development plans	2.1 Funded and approved continued support to existing sector plans	1 - 3 sector plans approved for grant funding	Official approvals or funding letters based on the evaluation committee feedback. Grant Agreement based on SDPs Letters of endorsement by industry stakeholders	
	2.2 Funded and approved vertical and horizontal partnerships/plans between and across multiple associations	1- 3 collaboration agreements or joint action plans approved for grant funding.	Signed partnership agreement plans, funding letters based on the evaluation committee feedback. Grant Agreement based on joint agreements Letters of endorsement by industry stakeholders	Associations have shared objectives and are willing to collaborate.
	2.3 Funded and approved transboundary (countries or SA provinces)/landscape approach plans for Nature Positive Alliances, EU trade, GI or other	1 - 3 coordinating alliance established plans approved for grant funding	Alliance charter, funding letters based on the evaluation committee feedback. Grant Agreement of SDPs Letters of endorsement by industry stakeholders Biodiversity Management Plans, Resource Development plans etc.	Countries in Southern Africa see value in a coordinated approach to biotrade sector development.

3. MACRO LEVEL- Immediate Outcome				
An enabling environment to exchange and cooperate in the biotrade economy				
Immediate outcome indicator				
Improved stakeholder perception of regulatory environment				
Means of verification				
Annual perception and feedback survey (targeting SMEs, industry associations, regulators)				
External Factors (Assumptions/Risks)				
Insufficient number and diversity of survey responses to ensure representativity				
	Output	Indicators	Means of verification	Assumptions
Supports government to create conditions for inclusive partnering, and cooperation amongst biotrade actors	3.1 Available and accessible national resources to support compliance, conservation, sustainable use and equitable benefit sharing.	Online resource hub established and operational (separate from DFFE website) 15 - 20 sector specific templates, SoPs etc developed 100 stakeholders using the guidelines and templates	Website analytics Webinar reports and attendance lists Download statistics Stakeholder feedback on resource usefulness	
	3.2 Inter-departmental (national & provincial) forums are able to mainstream conservation, sustainable use and equitable benefit sharing of biodiversity.	3 provincial decision-tree tools developed 6 forums held with measurable improvement in coordination	Decision-tree publication Meeting minutes from intergovernmental forums Stakeholder evaluation surveys testing satisfaction with regulatory clarity Policy briefs or position papers resulting from engagements	Continued political will and leadership from DFFE and partner governments to prioritise ABS agenda.
	3.3-Strengthened regional (cross border) engagement on access and benefit sharing on indigenous biological resources.	Regional forum on ABS established 6 regional peer-learning sessions held 2 Industry-specific benefit sharing guidelines and templates drafted and piloted 2 countries/industries piloting standardised models	Workshop proceedings Template documentation Regional forum terms of reference and meeting records Follow-up implementation reports from regional partners	Regional stakeholders have the political will and resources to collaborate.
	3.4 South to South peer learning events, study tours and dialogue platforms convened	2 South to South learning events and exchanges held 6 online South-2-South peer online sessions 4 countries and institutions participating 2 follow-up collaborations emerging from exchanges	Event reports, agendas, participant lists and attendance registers Participant feedback Follow-up documentation and partnership agreements	

Annexure C – Project Steering Committee (PSC) rules & procedures

Based on the co-funding of the Swiss State Secretariat for Economic Affairs (SECO) the GBF Implementation project will be implementing the project “ABS Compliant Biotrade in South(ern) Africa (ABioSA)” phase III. The project works closely with the Department of Forestry, Fisheries and the Environment (DFFE), which leads the SA government’s approach to biotrade.

The ABioSA Project Manager, who is based at the GIZ office in Pretoria and will report to the GBF Implementation project, coordinates implementation of the ABioSA project.

Members

Representatives of SECO, the GIZ-implemented ABS Initiative and DFFE.

Observers

Stakeholder representatives are invited in their personal capacities based on their function and experience to provide technical and strategic advice to the PSC members. The role of observers is to add valuable input based on their expertise and experience in the sector, to avoid repetition of errors and to optimise effectiveness. The presence of the observers is also aimed at improving collaboration and partnerships across stakeholders.

Observers will not be remunerated. Where observers are not based in the province where the meeting is taking place, travel and accommodation will be organised and covered by the project.

Functions

Besides providing strategic guidance and advice to the project management the PSC is specifically tasked to

- review the implementation of the work plan and assess the impact,
- support raising additional financial and human resources,
- support mainstreaming ABS capacity development into national and (sub-)regional bilateral development cooperation projects and programmes,
- ensure effort and expenditure are appropriate to the needs and the demands of the stakeholders,
- ensure emerging issues are considered and integrated into the activities, goals and outcomes.
- ensure that activities are aligned and coherent with the overall strategy and the objectives of the ABS Initiative,
- approve annual work plans and budgets,

PSC Secretariat

The PSC Secretariat is with the ABioSA Project Management team and includes the following responsibilities:

- Organising and inviting for meetings,

- Preparing the agenda in close coordination with the chair (see below),
- Sending agenda and other documents to members and observers,
- Writing minutes of meeting (for members only) and meeting report (for observers and general public).

Meetings

The PSC shall meet at least twice a year. SECO shall chair the mid-term meetings, restricted to the PSC members. The chair for the annual meetings shall rotate between GIZ and DFFE. Ad hoc meetings could be called in the event that any risk and/or challenge has been identified that requires immediate attention. With a view to clearly separate the PSC function of providing general guidance and advice to the ABioSA Project Manager and decision making on annual workplans and budgets the PSC annual meetings are organized in two parts:

1. Meeting of members and observers: Main tasks are to review implementation and provide strategic guidance to the NPC for the next planning phase
2. Meeting of members: Main tasks are to approve annual work plans and budgets, discuss matters of strategic importance to the project, and appoint members of the Investment Committee.

Decisions are taken preferably by consensus. In the event that PSC members cannot reach consensus, the chair of the meeting will call for a vote. SECO, GIZ and DFFE have one vote each. Documents prior to these meetings shall be shared two weeks before the meeting to provide sufficient time for participants to prepare.

Reporting

Minutes of the meeting and a report for publications on the website of the ABS Initiative will be made available no later than two weeks after each meeting. Both documents will be approved by silence procedure, i.e. no response until a set date and time (usually close of business one week after sending the documents) is considered as approval.

If Project Management requires guidance or decisions between physical meetings of the PSC the ABioSA Project Manager will initiate email consultation among PSC members. Silence procedure will be applied if any decision is to be taken.