

Deliverable 4.2

Strategy for evolution of the Connecting Nature Enterprise Platform (CNEP)

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List of Abbreviations

Abbreviations	Meaning
CNEP	Connecting Nature Enterprise Platform
COP	Communities of Practice
GoNP!	Go Nature Positive
NBE	Nature- based Enterprise
NbS	Nature-based Solutions
NPE	Nature-positive Economy
NN+	Network Nature+
SaaS	Software-as-a-Service
WWF	World Wildlife Fund
UNEP	The United Nations Environment Programme
WEF	World Economic Forum
UN SDG	United Nations Sustainability Development Goals

Executive Summary

This deliverable, *D4.2 Strategy for evolution of the CNEP, profiling plans for NBE engagement for scaling and investment*, presents a strategic plan to develop the Connecting Nature Enterprise Platform as part of the GoNaturePositive! project to support the visibility, scaling and investment readiness of nature-based enterprises.

Nature-based enterprises are driven by a clear mission to work for and with nature. They deliver nature-based solutions to address climate change and biodiversity challenges. ‘Nature-Based Enterprise’ (NBE) is an umbrella term, embracing enterprises working across many existing economic sectors that deploy nature-positive practices as part of their core business activities. This strategy outlines how these businesses can be identified, engaged, and supported to scale despite being highly fragmented and hard-to-reach, primarily due to their size and way of functioning. Nature-based enterprises form an integral part of the nature-positive economy concept and framing as set out in Deliverable 1.1 and Milestone 9 of GoNaturePositive! Developed through a collaborative and iterative process, this strategy incorporates insights from NBEs, project partners, pilots, Impact Board members and other stakeholders to address the evolving needs of nature-based enterprises and their role as a key driver in the transition towards a nature-positive economy.

The strategy situates the CNEP as a ‘go-to’ platform for nature-based enterprises within the broader context of the nature-positive economy. It proposes a phased approach - to improve awareness around the term ‘nature-based enterprise’ and to support such businesses on their scaling journey, which may differ from conventional models of business scaling. The platform aims to have a ‘community-first’ approach to encourage knowledge sharing, peer-to-peer learning and collaboration.

8 key findings emerged from research and engagement activities leading to the development of this strategy:

- Key finding 1: Low level of awareness of the term Nature-Based Enterprise (NBE).
- Key Finding 2: Nature-based enterprises need success stories and case studies.
- Key finding 3: Nature-based enterprises are a hard-to-reach sector.
- Key finding 4: Language is a barrier to nature-based enterprise scaling and growth.



- Key finding 5: Nature-based enterprises require entrepreneurial knowledge and training to support scaling.
- Key finding 6: More awareness is needed for the financing community to understand NBEs and vice-versa.
- Key finding 7: Nature-based enterprises want to collaborate with other NBEs to accelerate impact.
- Key finding 8: NBEs need improved indicators, metrics and standards to raise awareness of their nature-positive practices and to safeguard against 'greenwashing'.

In response to these findings, four key actions are proposed in this strategy:

- Action 1: Restructuring of the current Connecting Nature Enterprise Platform and increased use of social media to enhance awareness about the concept of nature-based enterprises and further increase engagement with these businesses.
- Action 2: Increase broader awareness and support about nature-based enterprises in other key stakeholder groups, in particular among policymakers and the financing community.
- Action 3: Deploy increased networking and capacity building measures to accelerate financing and scaling of nature-based enterprises.
- Action 4: Collaborate with other partners on indicators, metrics and standards to increase awareness of the nature-positive practices of NBEs.

The emphasis of this strategy is on offering flexibility to accommodate different nature-based enterprises, across sizes and sectors. The Connecting Nature Enterprise Platform will work in conjunction with trade associations and industry associations to establish stronger relationships to align profiling activities with overall GoNaturePositive! goals. The profiling framework will be dynamic and responsive, evolving alongside the community and serving as a foundation for future engagement, research, and impact measurement. This strategy offers a structured yet adaptive blueprint for growing the Connecting Nature Enterprise Platform as a thriving community of nature-based enterprises central to the nature-positive economic transition.

1. Introduction

1.1 Project Summary and Objective of this Deliverable

The GoNaturePositive! (GoNP!) consortium is coordinated by Trinity College Dublin (TCD) and involves 20 partners across 14 countries, represented by research institutions, non-profits and environmental organisations that are leading the nature-positive agenda at global and European levels. The project runs from 1st January 2024 to the 31st of December 2027.

GoNaturePositive! adopts a multi-stakeholder approach for systemic change, with nature-based solutions (NbS) and nature-based enterprises (NBEs) at its core. GoNaturePositive! delivers a clear definition and conceptual framework for the nature-positive economy (NPE). The project demonstrates how nature-positive practices can generate multiple benefits for people, businesses and the planet.

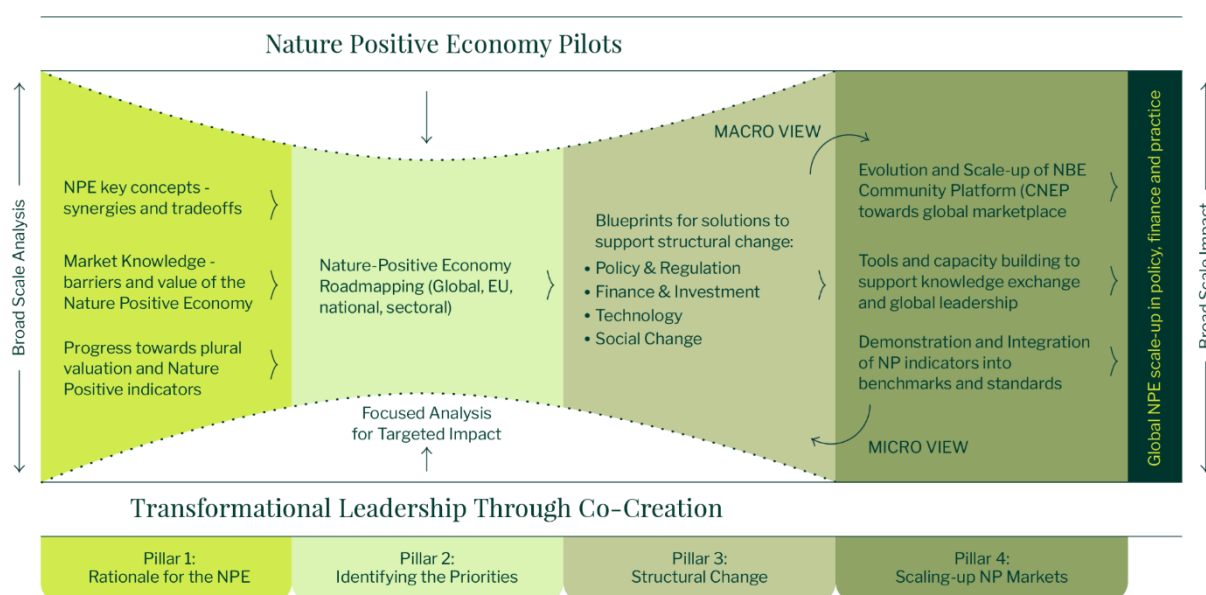


Figure 1: GoNaturePositive! Methodology (Source: GoNP!)

Deliverable 4.2 is a key strategic document for Work Package 4 of GoNaturePositive! Work Package 4, titled “Scaling the Market”, sits within Pillar 4 of the GoNaturePositive! Methodology (Figure 1). The focus of this work package is on working with, and developing the capacities of, the business sector (including nature-based enterprises), through the 5 industry sectors¹ of this project, to incorporate nature positive

¹ Agriculture, Built Environment, Blue Economy, Forestry and Tourism.

transformative practices into their operations. Work Package 4 builds upon the outputs of Work Packages 1-3 by incorporating the following: the GoNP! concept of a nature-positive economy developed in Work Package 1; the transformative pathways of Work Package 2; and the solutions developed in Work Package 3 for businesses, including nature-based enterprises, to undertake transformative change. While the testing of these outputs and tools will be an important element of Task 4.2, the actions to scale the measures beyond the pilot regions and across sectors for nature-based enterprises (TG3) will be concentrated through the Connecting Nature Enterprise Platform (CNEP) as elucidated in Task 4.3.

Actions to scale nature-positive transformation among the remaining target groups of the GoNP! project will be prioritised through additional European and global industry platforms, including, as examples, Network Nature, Business with Biodiversity, and the World Benchmarking Alliance. The Connecting Nature Enterprise Platform will leverage connections with national and EU Business and Biodiversity platforms, NN+ and UrbanByNature Hubs, working with consortium partners and the Impact Board and will strive to build new connections with EU, member state and Horizon Europe Associated Countries initiatives and global initiatives to develop the CNEP to support the scaling of nature-based enterprises (NBEs) and for NP impact (KER4).

Progression of economic activities towards a Nature-Positive Economy

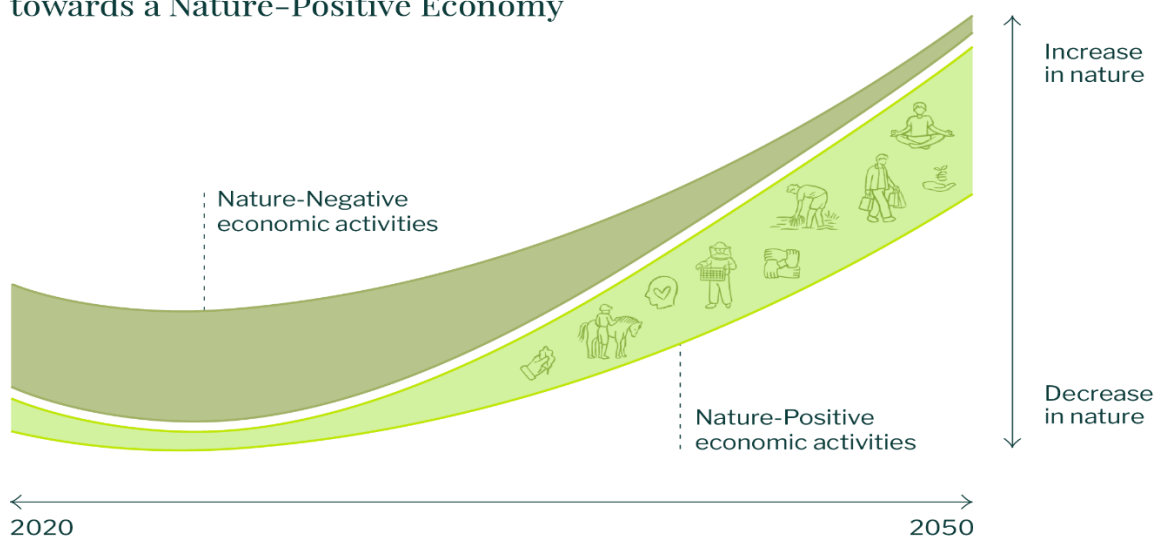


Figure 2: A Nature-Positive Economy means that the net result of all economic activities combined lead to an absolute increase in nature, to the point of full recovery. The economy undergoes a transition away from nature-negative activities towards more nature-positive activities (GoNP!)

GoNaturePositive! proposes that a nature-positive economy (NPE) is one where “the net results of all economic activities combined, leads to an absolute increase in nature towards full recovery” (GoNP! Concept Note, 2024) (Figure 2). The NPE contributes to achieving the Global Biodiversity Framework and UN SDGs to enhance societal wellbeing and prosperity. In short, a nature positive economy gives back more to nature and society than it extracts. To operationalise this concept of a nature-positive economy, Figure 3 shows that businesses, governments, and other ACTORS should take ACTIONS across multiple SCALES and SECTORS, aligning with SOCIETAL FACTORS to improve social-ecological well-being and equity. Nature-based enterprises are identified as one of the key actors required in the transition to a nature-positive economy.

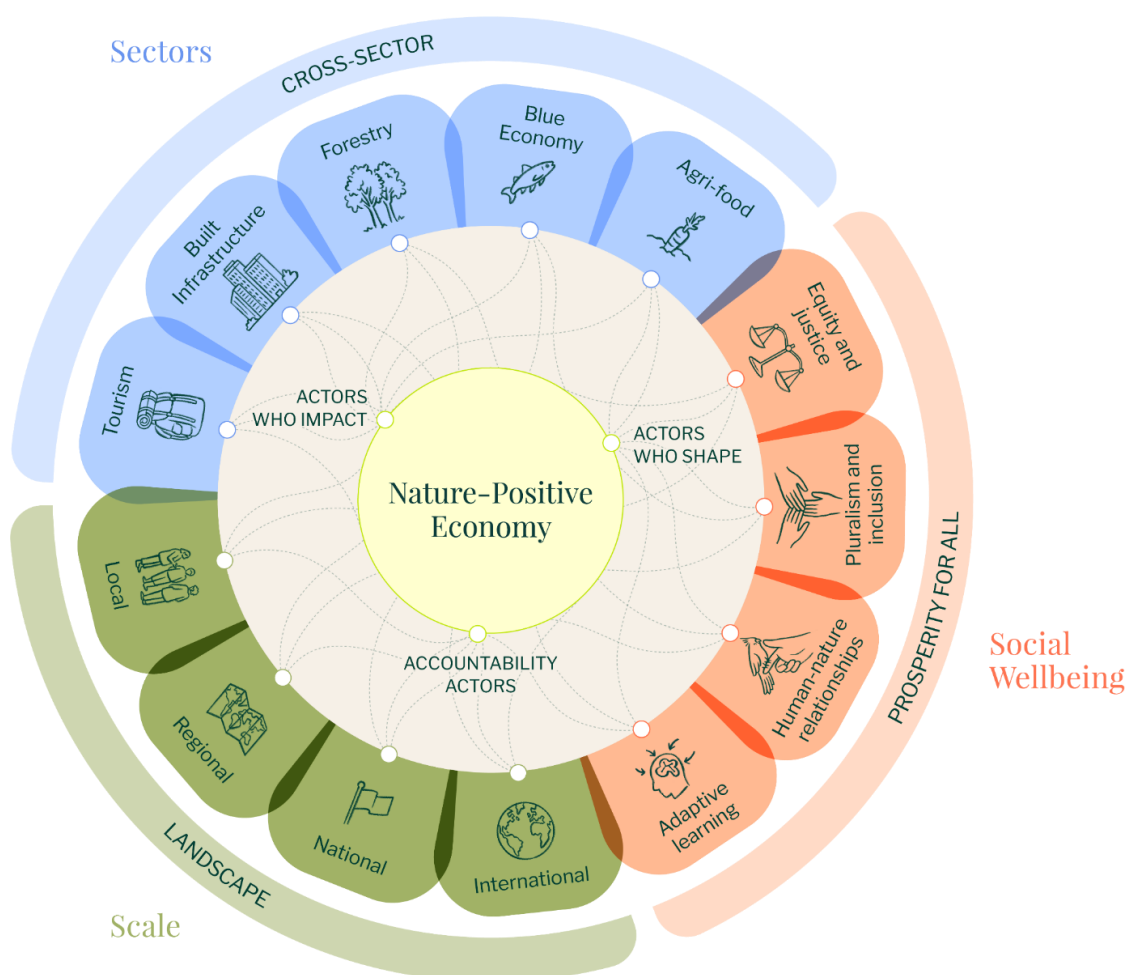


Figure 3: Key elements of a Nature-Positive Economy (Source: GoNP!)

2. Nature-based enterprises in a nature-positive economy

Nature-based enterprises are one of the key enablers of a nature-positive economy. Their core business is to implement locally adapted nature-based solutions² that restore nature while supporting economic development. ‘Environmental economy – statistics on employment and growth’, a report published by the EU in 2020, referred to Eurostat estimates to show the growth of the EU environmental economy, which outperformed the overall economy in terms of employment and value added between 2000 and 2022. NBEs have the hybrid goal of implementing nature-based solutions while creating market mechanisms that value ecosystem services, enabling the shift to a nature-positive economy. As defined at the 5th United Nations Environment Assembly (UNEA 5.2), nature-based solutions (NbS) are “actions aimed at protecting, conserving, restoring, and sustainably managing natural or modified terrestrial, freshwater, coastal, and marine ecosystems, which address social, economic and environmental challenges effectively and adaptively, while simultaneously providing human well-being, ecosystem services, resilience and biodiversity benefits”.

2.1 Nature-based enterprises - definition and characteristics

Early research, in the Connecting Nature Horizon 2020 project (2017-2022), characterised nature-based enterprises as enterprises that are driven by a mission to work with and for nature to address climate change and biodiversity challenges. They are engaged in economic activities but often have a social as well as an environmental mission. NBEs can be further classified into sectors working either directly or indirectly with nature (Kooijman et al., 2021). ‘Nature-based enterprises’ is used as an umbrella term encompassing many different enterprises working across many different sectors (Figure 4).

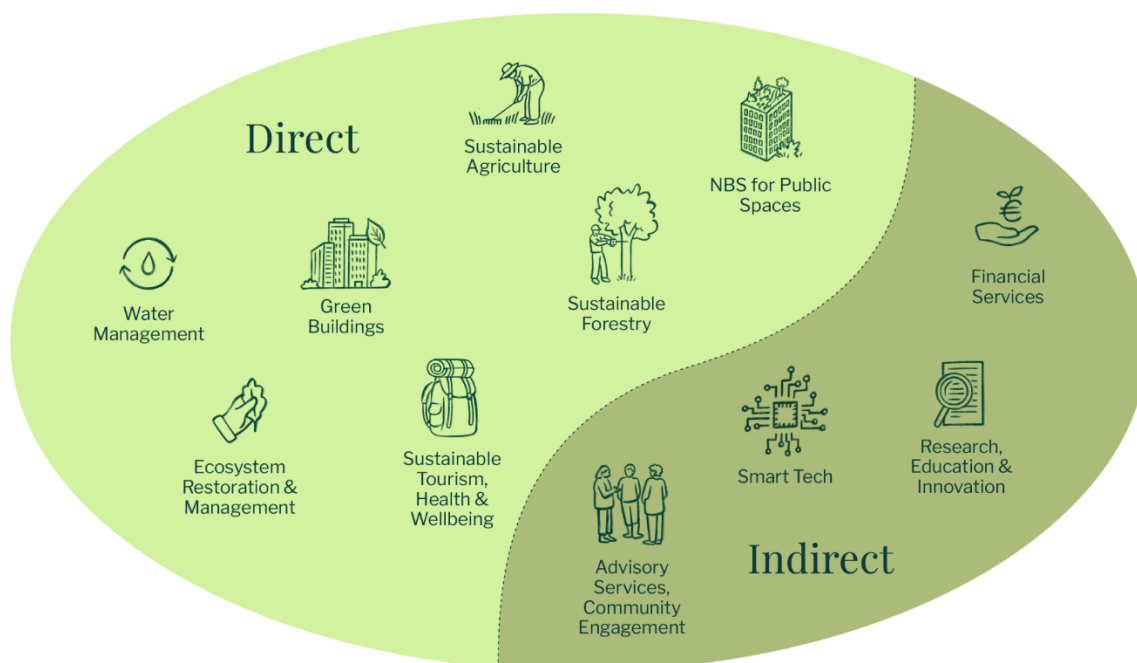


Figure 4: Sectors working either directly or indirectly with nature as identified by Kooijman et al, 2021.

Subsequent research undertaken in the Invest4Nature Horizon Europe project (2022-2026) identified the characteristics of NBEs, including their size, purpose, level of market demand and financing sources. Of the 124 validated responses, the majority identified as an SME, with a turnover of less than 2 million euros and with an employee count of between 2-10 (Figure 5). This corresponds with a profile of businesses in the EU with the majority being micro or small businesses.

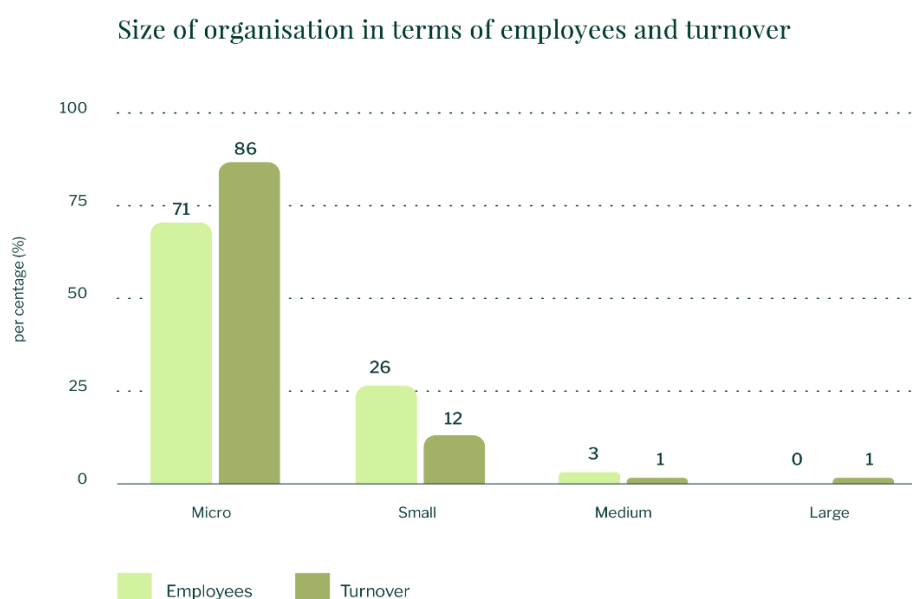


Figure 5: Majority of NBEs interviewed were NBEs (Source: Invest4Nature, 2024)

Over 60% of the respondents were established within the past 10 years, and 69% reported that they had hybrid economic and non-economic goals. Non-economic goals were predominantly environmental and social. A significant majority of NBEs surveyed reported an increase in market demand, with 46% experiencing a strong increase in demand and 43% reporting a slight increase in demand (Figure 6). This compares favourably with the levels of market demand experienced by the SME population in Europe in general (Invest4Nature, 2024).

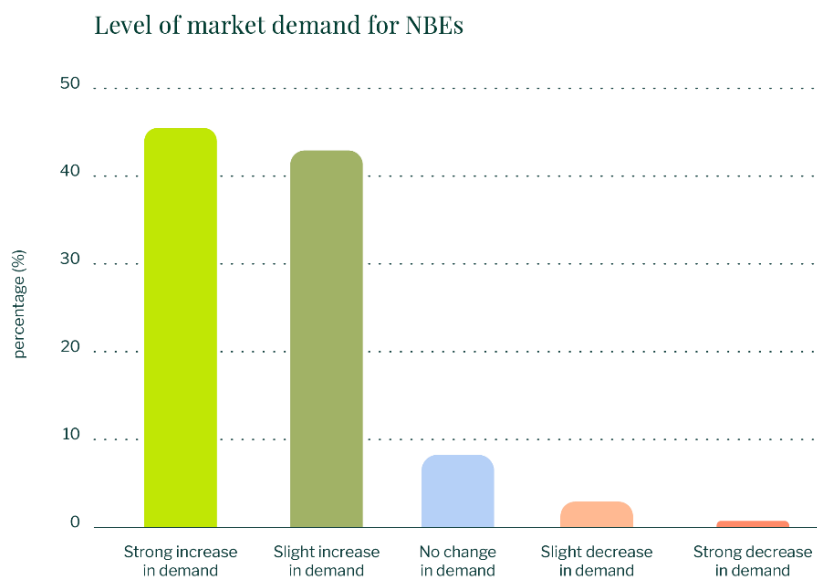


Figure 6: Vast majority of NBEs saw a strong increase in market demand (Source:I4N)

Figure 7 shows the different types of financing used by NBE survey respondents during various stages of growth. The graph illustrates that personal finance was key in providing a strong foundation for these businesses in their start-up phase, which was then followed by public funds, which increase in use at both current and future points. Over time, personal funds diminish in importance and greater reliance is placed on retained earnings/profits to meet both current and future funding needs. Institutional and private finance are the least used forms of financing, with a marginal increase in use of both forms of financing in future plans.

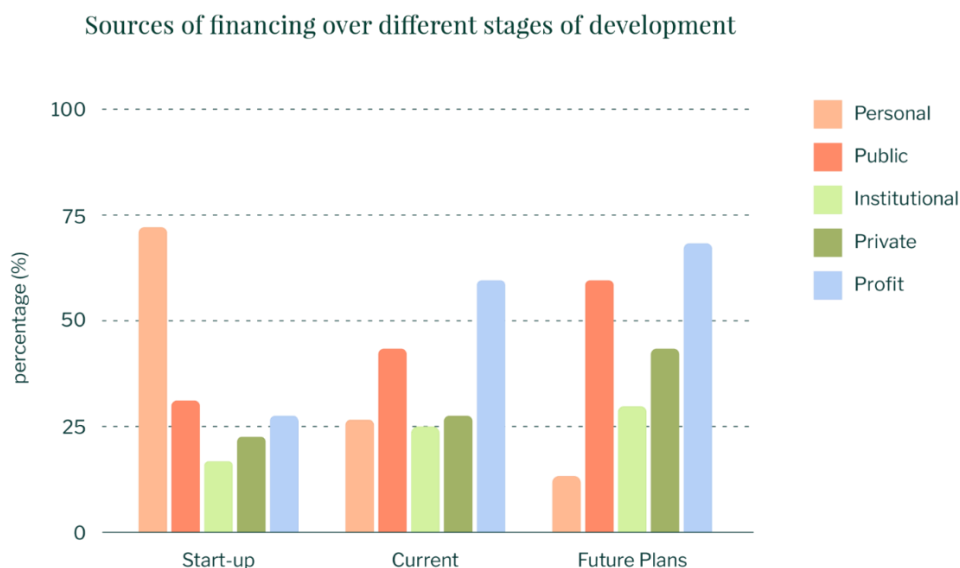


Figure 7: Personal financing is an important method during the start-up phase (Source: I4N)

2.2 The Role of NBEs in the Nature Positive Economy

Milestone 9 (2025) of GoNaturePositive! identifies that different actors in society (Figure 8), such as governmental bodies, businesses and community groups, have significant roles to play in this process of transition towards nature-positivity. The roles of the actors can be divided into three major categories: 1) actors with high impact and dependencies on nature (businesses and NBEs); 2) actors who shape the economy (policy makers, governments, investors and standard bodies); and 3) actors who encourage accountability (NGOs, researchers, citizens and civil society).

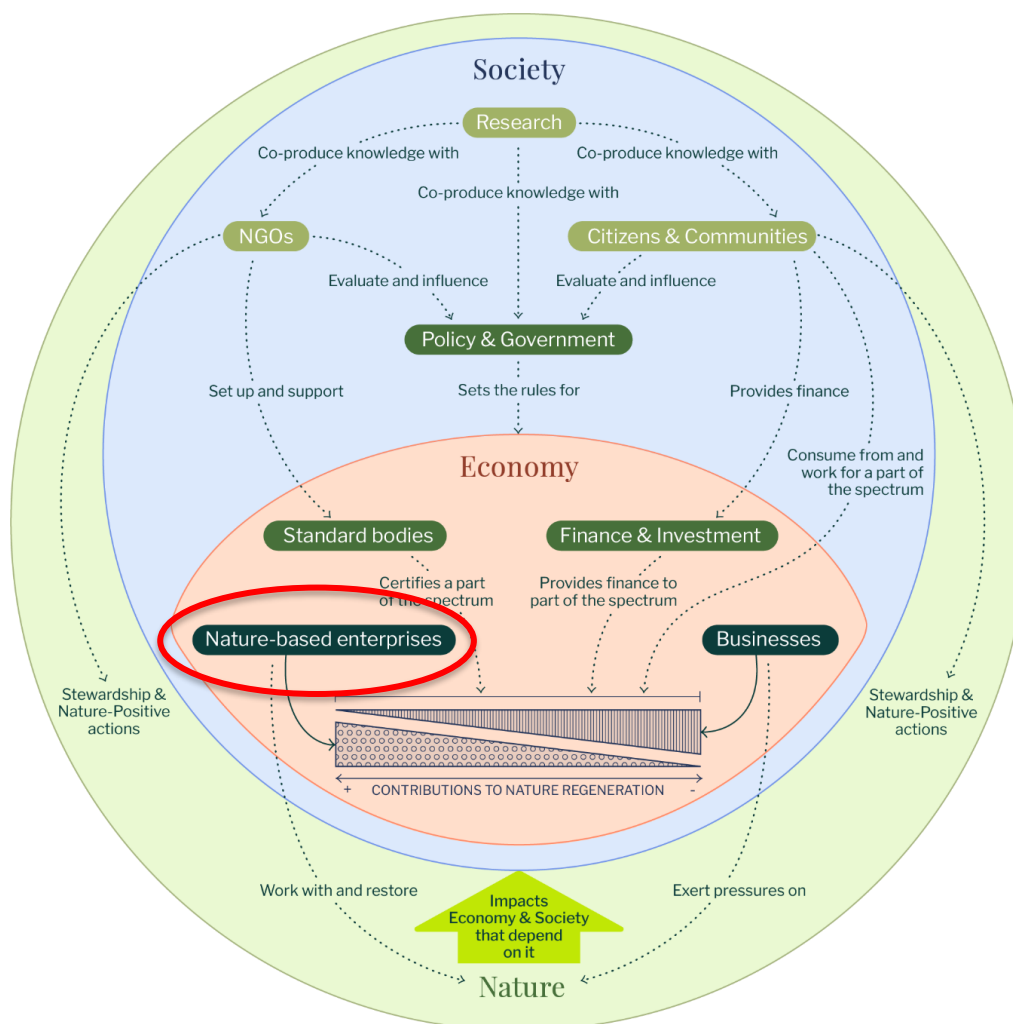


Figure 8: The core role of NBEs in the Nature-positive Economy (Source: GoNP! 2025)

Nature-based enterprises, whose core product/service offering are nature-based solutions leading to nature conservation and/or restoration, play a key role in the transition towards a nature-positive economy by aligning their business practices with broader ecological and community needs. NBEs generate significant socio-economic impacts through their contributions to innovation, skills development and job creation.

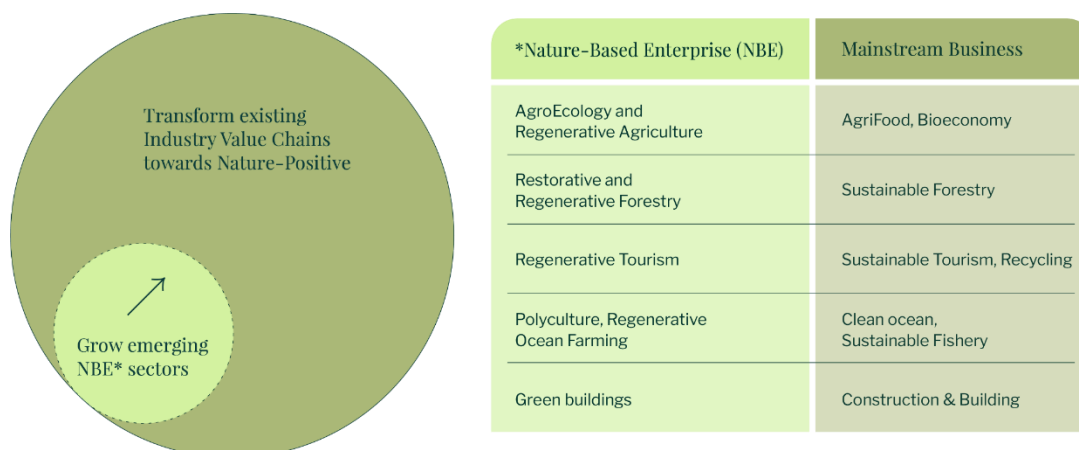


Figure 9: NBEs as an emerging sector that helps transition the mainstream economy towards a more sustainable one.

One of the goals of GoNaturePositive! is to accelerate the growth of nature-based enterprises (Figure 9), which form an integral part of the nature-positive economy. According to the World Economic Forum's 'The Future of Nature and Business' report published in 2020, nature-positive recovery can unlock business opportunities worth an estimated \$10 trillion by transforming three economic ecosystems that are responsible for almost 80% of nature loss, while simultaneously creating 395 million jobs by 2030 (Figure 10).

15 transitions to unlock business opportunities and jobs (WEF Report)

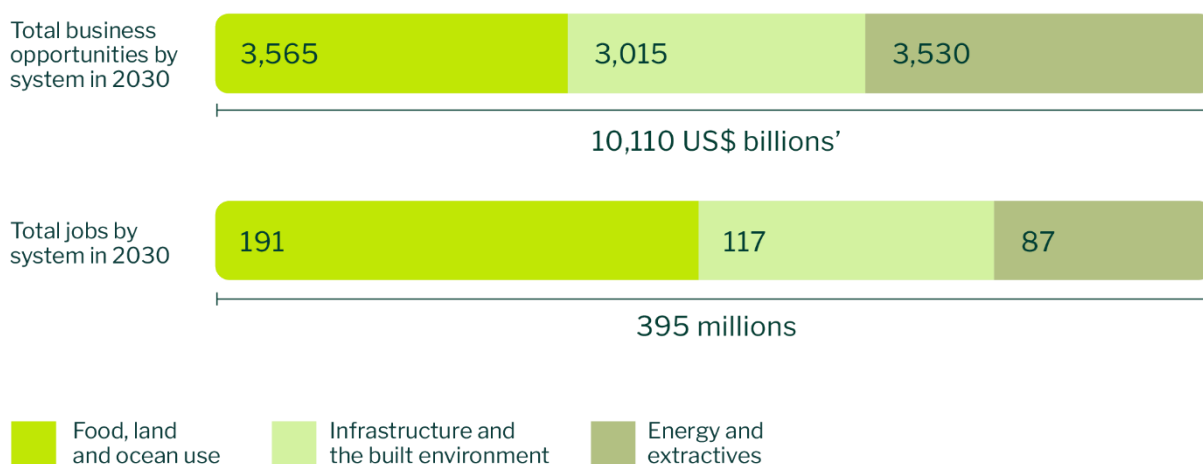


Figure 10: 395 million jobs by 2030 through 15 systemic transitions to three economic sectors (Source: WEF)

In GoNP! five thematic areas were chosen, representing two of the three key ecosystems identified. The selected thematic areas are: Agriculture, Forestry, Blue Economy, Green Buildings and Tourism.

- Agriculture – this sector has significant impacts and dependencies on nature. However, this sector has the potential to undergo a nature-positive transition through, for instance, the expanded adoption of organic, agro-ecological and regenerative farming practices (McDonald et al., 2025).
- Forestry – is another high-impact sectors, not least due to its large spatial footprint. Of the EU forest habitats, the vast majority (84%) are currently reported as having “poor” or “bad” conservation status, while only 16% have a “good” conservation status (European Investment Bank, 2023). There is, thus, a need to increase the number and impact of nature-based enterprises operating in this sector including those linked to regenerative forestry and agroforestry.
- Blue Economy – Blue economy spans every industry and sector linked to oceans, seas and coasts, whether they operate directly within the marine environment or on land (EU, 2024). Nature-negative practices in the seas and oceans have resulted in habitat destruction, pollution, harm to endangered species as well as economic difficulties for fisheries arising from lower yields of fish stocks. Examples of NBEs within the blue economy include those that undertake regenerative aquaculture or coastal/marine restoration.
- Green Buildings – The built environment is among the economic sectors with the highest impacts on nature. Urbanisation and construction have been major drivers of biodiversity degradation (Kupilas et al., 2025). Nature-based enterprises that deliver urban greening, green roofs and facades can help to mitigate urban heat island effect, enhance climate change adaptation and generate a range of societal benefits (WBCSD, 2023).
- Tourism – mass tourism contributes to many negative impacts for local communities, for biodiversity loss and for climate change resulting from the building of tourism infrastructure, transport-related CO₂ emissions, and the introduction of invasive species (WTTC, 2022). Nature-based enterprises may emerge through the provision of ecotourism and sustainable recreation in restored natural habitats.

2.3 Challenges and Enablers

Early **Horizon 2020** research (McQuaid et al, 2021) provided a first insight into the most significant barriers and enablers NBEs faced. Political factors were identified as a significant barrier, including the lack of awareness and integration of NbS into relevant policies and economic instruments hindering market development. Other key influencing factors relate to financing (both public and private), lack of industry standards, and capacity to measure impact. The importance of industry networking, access to education, training and skills development emerged as key enablers for nature-based enterprises.

In 2024, further research on the characteristics of nature-based enterprises particularly in relation to their stage of development or maturity, markets, financing and skills needs was carried out in the [Invest4Nature](#) and [NbS EduWorld](#) Horizon Europe projects. The research conducted by Invest4Nature examined the market development and financing environment of NBEs. Through a survey, NBEs were asked how much of a challenge financing is to them. Of the 115 respondents who answered this question, 75% identified financing as a challenge, with 39% mentioning it as the ‘most important challenge’ they face. McQuaid et al. (2021) had identified that NBEs face a range of challenges, including a general lack of financing for NBEs, reliance on public sector financing and misalignment with investor interests. Figure 11 identifies the significant role played by internal barriers to financing. Some of these barriers, such as knowledge, internal resources and support measures, stem from time and resource constraints that NBEs face.

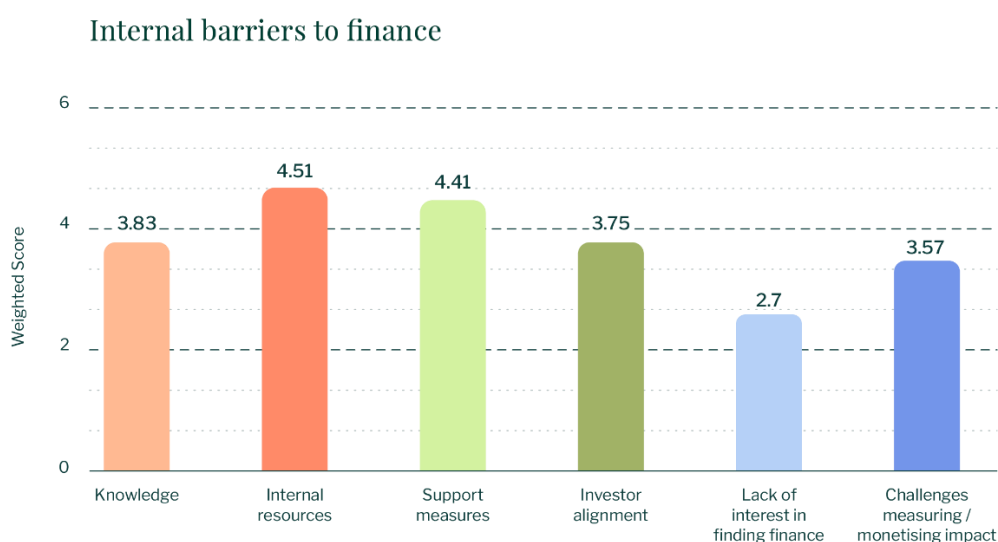


Figure 11: Internal barriers to financing for NBEs (Source: I4N)

3. Context

The overarching goal of GoNaturePositive! is to accelerate awareness and transformative action towards a nature-positive economy among policy makers, investors, businesses and wider society. To achieve this, GoNaturePositive! has adopted a multi-stakeholder approach for systemic change, with nature-based solutions (NbS) and nature-based enterprises (NBEs) at its core. The identified target groups essential to the realisation of a NPE are listed below (Table 1).

GoNP! Target Groups	
TG1 – Policy makers	TG5 -NGO's including environment
TG2 - Business	TG6 - Citizens
TG3 - Nature-based enterprises	TG7 – Standards Bodies
TG4 - Finance	TG8 - Research

Table 1: 8 target groups identified as part of GoNP!

Nature-based solutions and nature-based enterprises play a critical role in transitioning to a nature-positive economy. By addressing nature loss, NbS can reduce environmental risks and impacts to businesses and the wider economy, while also contributing to ecological restoration and societal wellbeing. Integrating NbS such as regenerative agriculture, agroecological methods, and natural water management into business operations and value chains is not only environmentally responsible but also a risk mitigation strategy for the businesses. NBEs, including green building providers and agroecology farmers, are a key actor delivering these nature-based solutions, either as independent service providers or as part of larger value chain systems. As market demand for NBEs increases, there is a need for increased and dedicated support to help them scale, grow, and contribute to job creation.

GoNaturePositive! involves six pilot partners representing different industry sectors. The pilots (see Table 2) will be the main point of contact for the project and the platform to reach nature-based enterprises.

Industry Sector	GoNP! Pilot Regions & Reach	GoNP! Pilot Partners	NBE Type Targeted
Agriculture	Regional (Flanders, Belgium)	Voedsel Anders (Network)	Regenerative Agriculture / Agroecology

including Apiculture	Regional (Metropolitan Area of Aburrá Valley, Colombia)	ICLEI Colombia	Apiculture
Forestry	National, Italy	ETIFOR	Sustainable forestry
Tourism	Regional, Italy	ETIFOR	Nature-positive tourism
Blue Economy	Regional, West of Ireland	Western Development Commission	Regenerative Aquaculture Ocean farming
Built Infrastructure	European, National (Portugal, Czech Republic)	European Federation of Green Roof Associations, ANCV (Portuguese Association), AZSF (Czech Association)	Green buildings

Table 2: Pilots, their industry sector, pilot regions and the NBE sub-sectors they will target

Pilots will leverage their own networks to facilitate transfer of knowledge and expertise. They will organise events in their local languages as well as engage with other national and global events to ensure their sectors' representation. Pilots have a key role to play in engaging NBEs and mainstream businesses to participate in nature-positive transformation (T4.2) and the communication and dissemination of GoNP! learnings and findings. Pilot organisations will work closely with the CNEP to organise webinars and skills development programmes at local level to ensure effective engagement with NBEs. These organisations have a pivotal role to play in lobbying and advocating for improved support for NBEs among regional and national policymakers. With strong local and regional influence, they will also enable cross-sector collaborations and address fragmentation of NBEs and lack of industry representation and act towards them.

3.1 Role of CNEP in a nature-positive economy

The Connecting Nature Enterprise Platform was launched in 2020 as a spin-out innovation of the Horizon 2020 Connecting Nature project. This project was one of the first NbS funded projects to introduce measures and strategies to support the supply side of NbS, which includes nature-based enterprises and practitioners and professionals delivering NbS in the public sector and other organisations. Since its launch, the CNEP has evolved into a global platform connecting nature-based enterprises, with approximately 1500 members operating across 10 different communities of practice, each managed by an industry leader who acts as a community ambassador (Figure 12). Members can share resources, publish events, contribute to discussion and actively participate as panellists and organisers of webinars featuring best practice, latest trends, hot topics, etc. The Platform encourages and supports this engagement with a dedicated Platform Manager supporting the communities.

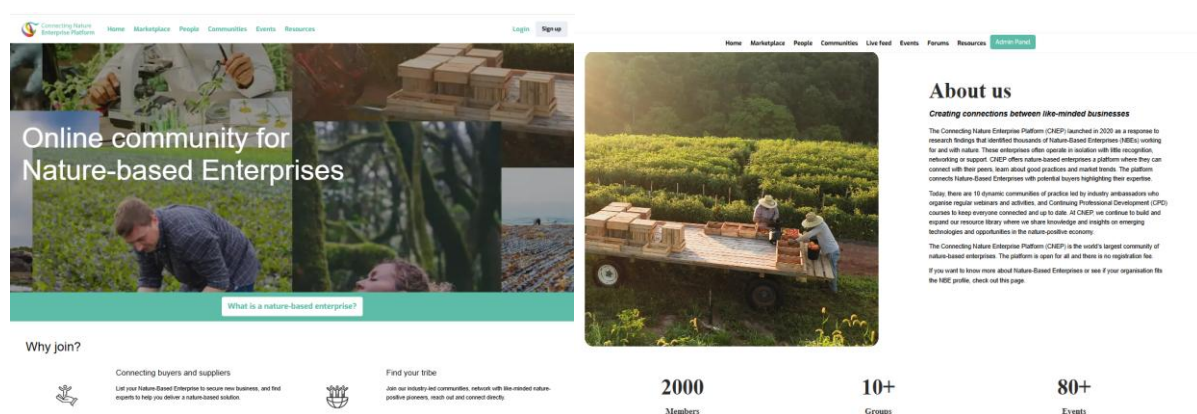


Figure 12: Homepage & About Us pages of the CNEP

Five of the ten communities of practice on the Connecting Nature Enterprise mirror the five thematic pilots of the GoNP! project (Figure 13). As such, GoNP! pilot partners have been appointed as Community Ambassadors for their respective communities and will play a lead role in facilitating community activities to support nature-based enterprises in networking, knowledge exchange and collaborative opportunities.

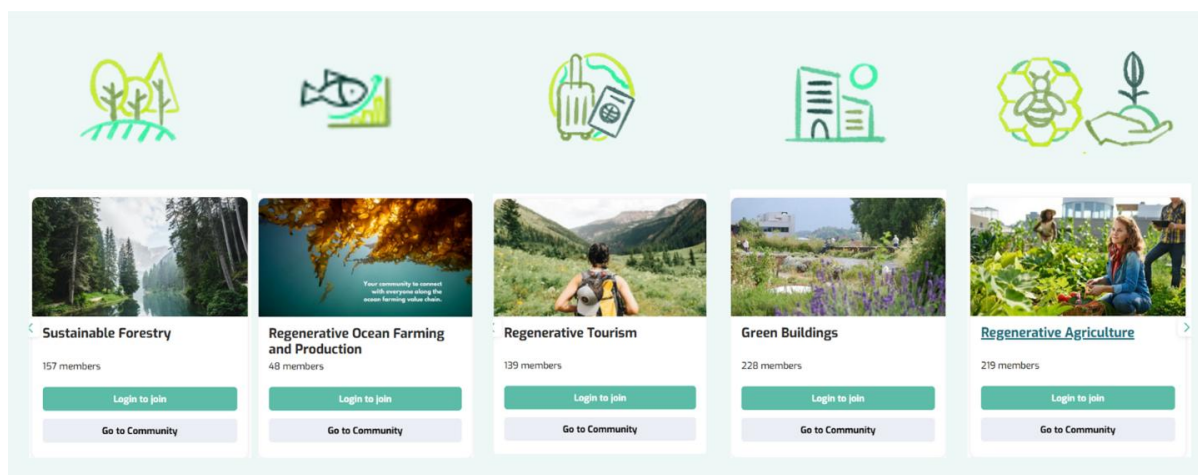


Figure 13: Five Communities of Practice on CNEP that represent the five pilot sector of GoNP! project

To effectively and successfully achieve these objectives, the Connecting Nature is Enterprise Platform will implement a strategy of action, in collaboration with the pilot partners, to ensure that nature-based enterprises are supported through a consistent and focused programme that prioritise their growth and scaling up. This action plan is outlined in Chapter 5.

3.2 Where does CNEP support other GoNP work packages and tasks?

Given the importance of NBEs in the operationalisation of the NPE concept, the CNEP plays an important role to play across many work packages and tasks. The table below (Table 4) is the result of mapping NBE/CNEP engagement in various tasks across work packages.

WP and Task	Required Action in Task	How will CNEP support?
WP1/ T1.4 Evidence Supporting Systemic Change/ Compiling Market Evidence and Insights	Market Survey	CNEP will help reach the NBE as a target group (TG) for the survey through specific messaging.
WP2/ T2.2 Pathways to Transformation/ Identification of Priorities: Establishing the Vision to Scale-Up the NPE through Stakeholder Engagement	Targeted stakeholder engagement	CNEP will play a key role in engaging with TG3 (NBEs) in this road mapping activity
WP3 T3.4 Driving Structural Change/Market	Workshops for early adopters	CNEP will help in the organisation and delivery of workshops disseminating

Transformation Driver-Technology		information about WP3 outputs.
WP3 T3.5 Driving Structural Change/Market Transformation Driver-Social Change	Social Change toolkit	CNEP will help in the dissemination of this project output.
WP4 T4.2 Scaling the Market/ Pilot nature-positive in practice in 5 industry verticals	Industry wide assessment of Nature-Positive (NP) status using NP indicators and benchmarks for relevant industry associations Supporting Pilots in awareness building and to engage with mainstream businesses and NBEs to create a GoNP! Pioneer Community for an intensive process of engagement towards NP.	CNEP will support the pilots to organise and deliver events and activities, in particular those targeting NBEs.
WP4 T4.3 Scaling the Market/Evolution of Connecting Nature Enterprise Platform to support global scaling of NBEs	CNEP to play a key role in supporting NBEs. Pilots will take on the roles of Community Ambassadors and will lead CNEP communities to ensure activities for engagement are delivered.	With pilot partners, the CNEP will run training programmes, workshops, etc to train the founders to enable them to craft a solid plan to scale. In a support role, CNEP will support pilot activities to ensure consistent community engagement.
WP4 T4.4 Scaling the Market/Actions to address industry fragmentation and lack of industry-wide representation in emerging NBE sectors	Design and delivery of capacity building and mentoring programmes on governance, business and membership models to support the emergence of new NBE industry associations addressing gaps in market sectors or geographical regions. CNEP will also support translation of content into multiple languages (min three) to facilitate greater uptake.	CNEP will identify industries and geographic locations that lack representative organisations and will work with local NBEs to resolve this. Mentoring programmes will be designed and delivered to facilitate this process. CNEP will encourage multi-lingual discussions and encourage native-speaker members to facilitate them.
WP4 T4.5 Scaling the Market/Accelerating uptake of nature-positive transformation in multiple sectors	CNEP, together with the GoNP! partner WBA, will engage proactively with NBE sector bodies and community engagement organisations	Building on outcomes from WP3 and T4.2, CNEP will design exploitation routes to encourage upscaling and outscaling. CNEP will also provide training on NP transformation for different stakeholder groups.

WP5 T5.2 Systemic Transformation: Nature-Positive Initiatives beyond Europe, Dissemination and Communication Worldwide/ GoNP! website, stakeholder engagement via partner platforms and capacity building toolbox	Capacity Building toolbox targeting dissemination and uptake of results across TGs through CNEP.	CNEP will work as the dissemination channel and co- delivery agent of online capacity building programmes in particular for NBEs.
WP5 T5.3 Systemic Transformation: NP Initiatives beyond Europe, Dissemination and Communication Worldwide/ Cultivating NP Leadership	Cultivation of NP leadership	CNEP will support and promote awareness raising measures among the NBE community to identify business leaders that can champion NP Leadership.

Table 4: Mapping of the role of CNEP in different tasks and WPs

As previously mentioned, the CNEP is a spin-out innovation of the Connecting Nature Horizon 2020 project. It has continued to develop and serve nature based enterprises since the end of Connecting Nature in 2022 through leveraging support across a number of Horizon Europe projects, supporting the further growth of communities, integrating research into the skills and capacity gaps of nature-based enterprises, delivering events on industry trends, and collaborating with industry bodies to develop and deliver Continuous Professional Development (CPD) programmes and best practice webinars. A more focused strategy however is required to ensure the GoNP! impact of accelerating NBE development by the end of 2027. While specific measures have been identified, it is important to contextualise the evolution of nature-based enterprises as well as the Platform to provide an in-depth understanding of the challenges the platform addresses.

3.3 Evolution of CNEP



Figure 14: Earlier version of logo and homepage for CNEP

The Connecting Nature Enterprise Platform (Figure 14) was launched in October 2020 as a direct response to addressing a significant bottleneck where cities and developers seeking to implement NbS voiced their difficulty in finding and sourcing skilled suppliers of NbS (Connecting Nature, 2020). Developed as a marketplace to match buyers and suppliers of NbS, the Platform introduced 10 communities of practice (Figure 15) where nature-based enterprises and other organisations operating in the same sectors meet informally, network, exchange best practice and collaborate. While creation of a marketplace was the primary intention, it also aimed to address other key challenges faced by NBEs identified in research (McQuaid et al, 2021). A lack of awareness among decision-makers and isolation among pioneering NBEs, often unrecognised within their industries, has led to fragmentation and poor knowledge sharing across sectors and borders. As NbS gained mainstream attention and funding, new actors entered the space, bringing inconsistent standards due to limited access to innovation and shared expertise. This sometimes resulted in poorly designed NbS (e.g. green walls, urban gardens) that failed over time, damaging credibility. In some cases, initiatives like afforestation credit schemes led to greenwashing, as monoculture plantations displaced local communities and ecosystems. These issues, common in emerging industries, spurred the development of standards such as the IUCN Global Standard for NbS and sector-specific guidelines e.g. for green roofs. While these standards are improving the quality of NbS delivery, they remain uneven across countries and industries.



Figure 15: Communities of Practice established on CNEP in 2020

Growing the 10 communities of practice was key to the early success of the platform. Each community was moderated by a community ambassador (an industry professional) whose role was to highlight best practice in their sector, promote nature-based enterprises and raise awareness of nature-based solutions through the workshops, events and member communications (Table 5).

Community	Examples of Original Ambassadors	Biography
 Green Buildings	 Jonathan Muller, Helix Planzensysteme, Germany	Jonathan is an architect working in the family business alongside his father in 'Helix Pflanzensysteme GmbH' as Head Architect, managing the planning and implementing of functional NbS (Nature-based Solutions) in urban environments with a clear focus on vertical green walls and gardens.https://www.helix-pflanzen.de/
 Water Management	 Gerardo Gonzalez, BioAzul, Spain	As R and D project manager on Nature-based solutions, for BioAzul, a company based in Malaga, Spain focused on the development of eco-innovative and sustainable solutions for the treatment and reuse of water resources, Gerardo was the first Community Ambassador on the Connecting Nature Enterprise Platform for the Water Management Community
 Health & Wellbeing	 Shirley Gleeson Ecowellness Consulting, Ireland	Shirley Gleeson is the founder of Ecowellness consulting based in Ireland, a 'profit for purpose' organisation that designs, delivers and evaluates nature-based interventions to promote and enhance positive mental health. Shirley was the Community Ambassador for the Health and Well being Community on the CNEP.

Table 5: Examples of Community Ambassadors when the platform was launched in 2020



Figure 16: Poster of the first Nature Futures held in 2023

In 2023, the CNEP organised and ran the first Nature Futures event (Figure 16) for nature-based enterprises, attracting more than 400 registrations. Nature Futures is a horizon scanning event where the latest industry and market trends are

discussed and debated. The 2024 Nature Futures was organised in a hybrid format and hosted in conjunction with the GoNature Positive! kick-off meeting.

These events have been useful in taking the pulse of nature-based enterprises in identifying issues in terms of their needs. In 2023, as part of research conducted in Invest4Nature, NBEs were asked to identify their most pressing training needs. The results of this survey contributed to the shaping of the NbS EduWorld research on the finance and capacity building needs of NBEs, which in turn has helped shape the capacity building programmes developed in these projects targeting NBEs and delivered via the CNEP. Such capacity building programmes have been adapted to specific sectors and projects such as for example the adaption of generic NBE training for delivery of targeted training for seaweed entrepreneurs within the framework of the C-FAARER Ocean Missions project.

Figure 17 summarises some of the key achievement of the CNEP by the end of 2024.

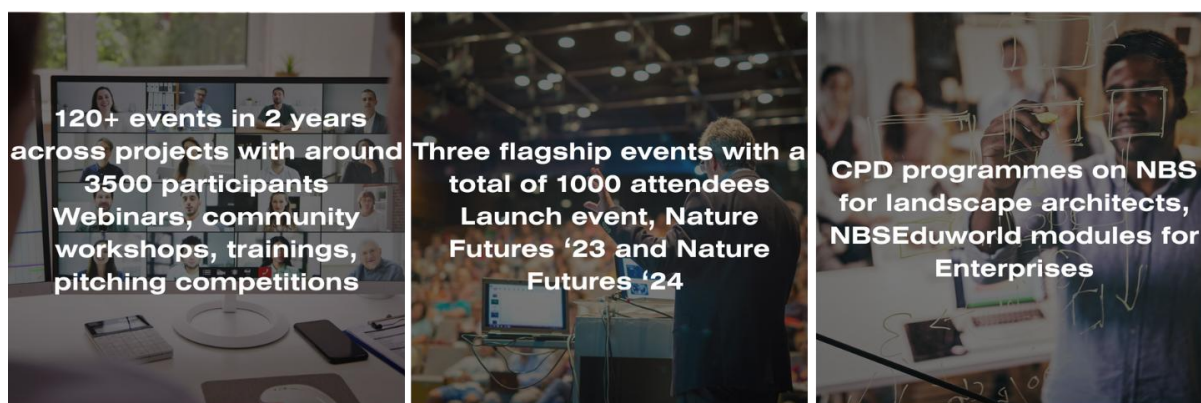


Figure 17: Key events and workshops delivered via CNEP

The Connecting Nature Enterprise Platform has successfully established itself as a leading online platform dedicated to nature-based enterprise support. Today, the platform, supported by GoNaturePositive! pilot partners, continues to raise awareness and support nature-based enterprises delivering nature-based solutions. As a vital actor in the transition to a nature-positive economy, NBEs showcase an alternative socio-economic model of development better aligned with the IPBES Transformative Change Assessment (IPBES, 2024) than many mainstream business practices.



As shown earlier in Figure 7, the over-reliance of nature-based enterprises on personal and public financing (particularly at early-stage) signals the need for this cohort to diversify its funding sources, and for greater uptake of institutional and private funding. Supporting the start-up and scaling of nature-based enterprises is a critical element of the transition to a nature-positive economy, and can start with supports for NBEs to improve their rate of uptake and success in applications for private, institutional and public funding. GoNaturePositive! accelerates and seeks to support and realise the growth and scaling of nature-based enterprises. To do this effectively, it is necessary to review how the platform itself can grow, adapt and improve its offering to better support nature-based enterprises in a meaningful way leading to:

- more start-ups and entrepreneurs entering this growing nature-positive market;
- less reliance of NBEs on personal investment and increased support from other financial actors and instruments;
- NBE scaling in terms of impact, both economic, social and environmental, consistent with nature-positive principles;
- vibrant communities of practice sharing knowledge to increase competitiveness and innovation in line with the Draghi report (2024);
- NBEs better supported by their industry bodies to address knowledge and skill gaps;
- NBEs become leaders and ambassadors for nature-positive transformation.

4. Methodology

To develop a strategy for the Connecting Nature Enterprise Platform to support NBE engagement for scaling and investment, it is imperative to understand how the platform sits in the nature-positive ecosystem. To understand this and to understand how different users of the Platform will interact with it during GoNP!, we performed an audit and analysis of the Platform. A combination of third-party analytics, platform audit, feedback survey, interviews and stakeholder engagement sessions were used to collect data. The results and outcomes of these are presented in the next chapter.

4.1 Platform Audit - Hivebrite Review

As part of a platform review in 2023, with the then Community Ambassadors and nature-based enterprises we worked with on the Platform, and also in considering the manpower resources needed to manage a developing Platform, a strategic decision was taken to move the Platform away from the bespoke design, which became too expensive to manage, to a SaaS customizable platform specifically design to support online communities and community hubs. A more flexible user interface was created with more scope to create and customise designs and formats for the different elements of the CNEP. With a built-in resource library for platform managers, and more support to assist on design and usability, the CNEP has embarked on a series of changes to improve user experience and interface. In addition to the technical specificities, the audit reviewed various aspects of the platform including user experience, content and performance among other factors. An in-depth analysis of the Hivebrite backend was conducted to better understand how to exploit the potential of the platform for nature-based enterprises and the GoNP! planned activities with several in-depth training sessions with Hivebrite.

Areas prioritised for improved user interface and experience included:

- NBE Listings on the Marketplace
- Event listings
- Exploiting community page features
- Content Management System
- Maximising the impact of community forums

- Maximising the impact of Live feeds

As part of the audit, levels of user engagement on the platform with regards to different features and functionalities were reviewed. Our audit revealed ongoing challenges with engagement and utilisation of the platform despite improvements to the functionality to meet user requirements. It was important to find out why engagement problems persisted and how users could be encouraged to make use of the features that the Platform offers nature-based enterprises, particularly as they transition along their nature-positive journey. The results are presented in the findings section.

4.2 Survey and Interviews with NBEs

As mentioned previously, an NBE survey (Jan - Apr 2024) and interviews (Oct 2023 - Apr 2024) were conducted as part of two European Union funded projects - Invest4Nature and NbS EduWorld. A dual sampling strategy was used to reach both existing NBE networks and potential new NBEs in the broader business community e.g. through social media campaigns (LinkedIn and X). The strong SME participation aligns with the European business landscape, where 98% are micro-SMEs. Of the 124 validated responses, the nature-based enterprises were spread across 34 countries including 7 countries outside of Europe. Qualitative semi-structured interviews were also carried out with 40 nature-based enterprises from 20 European countries to explore these themes in more detail. The insights from the survey and interviews helped to identify major gaps and challenges faced by nature-based enterprises in setting up and scaling up their businesses, building on previous literature (i.e. Kooijman et al., 2021; McQuaid et al. 2021).

A set of consultation calls was established to talk to representatives and members of four industry associations across sectors: Regenerative Agriculture, Green Buildings, Blue Economy and Regenerative Tourism. This gave a wider understanding of how they serve their members and how they might support nature-based enterprises within their membership.

4.3 GoNP Stakeholder Meeting with Community Ambassadors and Facilitators

As mentioned previously, to ensure GoNP! integration with CNEP activity, the GoNaturePositive! pilot partners took on the role of CNEP Community Ambassadors and facilitators for 5 platform communities, namely Regenerative Agriculture (Voesdel

Anders), Green Buildings (EFB), Blue Economy (WDC), Sustainable Forestry (ETIFOR) and Regenerative Tourism (ETIFOR). Ambassadors were provided with initial training to establish and maintain their respective community pages. In addition, they are expected to share best practice case studies, organise knowledge exchange activities and generally begin the process of introducing the concept of a nature-positive economy to Platform members. This was achieved through a series of online webinars in each sector

on the NPE concept note throughout October and November 2024.



Figure 18: GoNP! partner meeting in Vienna

During the GoNP! Pilot meeting in Vienna in February 2025 (Figure 18), information was captured on the experience of the ambassadors in their roles to-date, the community they manage as well as general observations about the platform. The feedback obtained is a core component of this review as pilot ambassadors are both end users on the

platform and community managers, and consequently at the core of platform activity. They are uniquely positioned to provide critical feedback and suggest improvement. A feedback survey, based on the findings of the platform audit (Hivebrite), was also circulated among the pilot partners to get an in-depth understanding of how relevant different features were.

5. Main Findings and Recommendations

To recap, nature-based enterprises are businesses with nature at the core of their product/service offering. Through research, surveys and interviews with businesses working closely with nature, it was identified that they are often small or micro, work in silos and lack collaboration. Nature-based enterprises include landscape architects, farmers, agri-food businesses, forest therapy practitioners, and seaweed farmers among many other professions within these economic sectors. This means that they are scattered across regions and sectors. The fragmented nature of the NBE sector results in the lack of a collective voice to represent these businesses on a wider stage to build their case for funding and policy support. The findings and recommendations provided below will help NBEs to grow, scale and collaborate on creating an umbrella sector to ensure they are represented in relevant discussions and policy decisions.

Key finding 1: Low level of awareness of the term Nature-Based Enterprise (NBE)

Many businesses deliver nature-based solutions, such as agro-ecological farming, ecosystem restoration, urban greening, regenerative ocean farming, among many others. While these businesses could be characterised as NBEs from a business and values perspective, often they do not use the NBE term to describe themselves. This is due to multiple factors. Many are unaware of the NBE concept and unfamiliar with how this translates into local language and terminology. They are more familiar with sector-specific language such as 'agroecological farms' or 'green roofs and walls'.

Findings from the Invest4Nature NBE research revealed that about one-third of respondents had never heard the term 'NBE' previously. Despite this lack of familiarity, when presented with an NBE definition, most felt it described their work accurately and saw the potential benefits in adopting the label, such as adapting with evolving EU policies, access to new funding opportunities, and a way to differentiate their offering from business as usual approaches contributing to the degradation of nature. However, some were concerned about the potential for confusion with existing sector specific terms.

A representative from a trade organisation in the aquaculture sector pointed out how using the term 'Nature-based enterprises' is a push towards remediation by bringing together the fragmented businesses that place nature at their core.



'... I haven't heard the term nature based enterprises. ... I think a nature based enterprise makes sense. You're, you're working with nature and instead of taking advantage of it. So there's a kind of slightly different model, and especially at the moment, we're trying to sort of use the nature based solutions to encourage profitability within the sector.'

- Trade association representative, Blue Economy.

Interviewees recognised the potential value in identifying as a nature-based enterprise in the long run, as it evolves to become a stamp of credibility for the good work done by these businesses in helping nature restore and regenerate. During the interviews, one interviewee pointed out the lack of knowledge about mechanisms and policies which could support NBEs.

"... I think there's a value in that because there is this, at least at the EU level, this EU Green Deal and all of these kinds of different financing mechanisms which are targeting NBEs. ... I don't think that they know, it exists to be honest"

Our findings suggest that NBE terminology may be useful for policymakers, financial institutions and other stakeholders as a way of aggregating nature-based activities spread across among multiple fragmented economic sectors. Actions to establish awareness levels and uptake of this term among policy makers are planned in GoNP!

Recommendations

CNEP will have a three-phase campaign to increase the uptake of the term nature-based enterprises, firstly among the business community, and secondly, among wider stakeholders, in particular policy makers.

The first phase will focus on onboarding NBEs to create a community to bridge existing sectoral silos and fragmentation and improve cooperation and efficiency. This phase will focus on those businesses that are unfamiliar with NBE terminology and need more awareness to understand the concept. The intention is to meet such businesses 'where they are at' i.e. using other more sector specific terminology that they're familiar with as an entry point for awareness raising. Phase 1 will primarily focus on attracting businesses to this sector by recognising and rewarding the work they are already doing. Creating a community for businesses working with and for nature will be followed by developing a pathway for them to explore and understand what it means for them to identify as an NBE and the benefits it will offer. The events

organised by CNEP will present nature-based enterprises with an opportunity to understand similarities and differences across different industry sectors through peer-to-peer learning and mentoring. It will also raise awareness of the value of using the NBE term as a common voice.

The second phase, which will run parallel to the first phase, will target those NBEs that are already aware of the term but need more information to understand the benefits and usefulness, but also limitations, of using this term NBE. In Phase 2, a wider campaign will be launched, bringing together GoNP! partners, pilots and the impact board members, to publicise the term 'Nature-based enterprises'. CNEP will collaborate with key organisations such as WWF, UNEP, Business for Biodiversity Ireland, the World Benchmarking Alliance, The Nature of Cities, and NetworkNature+ to raise awareness of both the NBE term and the vital role of these businesses in biodiversity restoration and climate resilience. These partnerships will support dialogues on what NBE scaling means such as how to improve integration of NBEs into mainstream business supply chains or support their independent growth as part of stand-alone community practices. These and many other approaches are needed to accelerate transition to a nature-positive economy.

The third phase, which will run also in parallel, will seek to raise broader awareness of the NBE term among other key stakeholder groups, including potential buyers in the private and public sector, policy makers and the general public. To broaden outreach, CNEP will continue to host online and offline events, alone and in association with other projects and partners, to foster collaboration and knowledge exchange across projects and sectors. Regular information sessions will also be held to improve public understanding of NBEs and nature-positive themes, helping to grow recognition and support for this emerging sector.

Social media will be used extensively to raise awareness of the NBE term among different stakeholder audiences.

Summary:

Phase 1:

1. CNEP will be positioned as a platform for practitioners to support better implementation of Nature-based Solutions on the ground, considering the improved engagement with the term nature-based solutions.
2. CNEP will develop an inclusive language and framing that will convey the benefits of identifying as an NBE and the alignment with existing terminology.
3. CNEP will continuously engage with these businesses to give them opportunities to explore the concept of NBE and lead them gradually to identify as one.
4. Efforts will be made to raise awareness among NBEs of the value of using this aggregate term with other stakeholder audiences such as policymakers. For



example, events will be organised to position the NBE term as a strategic standpoint to increase visibility, access funding and have a voice at policy discussions.

Phase 2:

1. CNEP will work closely with other networks such as Climate Farmers Academy, Savory Hub Europe for dissemination and outreach.
2. CNEP will organise webinars and information sessions for other stakeholder groups to engage with NBEs and gain insights into this sector.

Phase 3

1. CNEP will deliver a targeted campaign utilising spheres of influence of pilots, partners and impact board members to create high awareness for the term 'nature-based enterprise' among multiple target audiences.
2. A particular emphasis will be placed on raising awareness and uptake of the NBE term among policy makers. Actions will be organised with pilots to raise awareness among local policymakers. In collaboration with WP5, actions will be taken to raise awareness of the NBE term among national and EU policymakers.

Key Finding 2: Nature-based enterprises need to see Success Stories and Case Studies

Research shows that many nature-based enterprises (NBEs) feel that they operate in isolation within their own communities and mainstream industry sectors. This may be due to limited resources to raise local community awareness about their nature-positive approach, lack of recognition from mainstream industry players, and disconnection from the broader “nature-positive” narrative which is often dominated by large corporate perspectives on risk and opportunity. It is observed through various interactions with this community that NBEs need stronger networks and support systems, visibility and recognition. Showcasing success stories can inspire existing NBEs and potential new entrepreneurs (Figure 19), encourage awareness and collaboration at local level and more widely at national, European and global level, and raise awareness among the mainstream business community about the benefits of NbS and nature-positive practices. Increased visibility also builds investor confidence in NBEs, encouraging greater availability of green finance.



Figure 19: Examples of success stories that will be featured on CNEP

Recommendations

The CNEP will showcase success stories and in-depth case studies (bi-monthly) to highlight and celebrate pioneering nature-based enterprises.

The CNEP will showcase more success stories and case studies of NBEs across Europe and beyond. Featuring these businesses on CNEP will give them visibility and a much-needed validation for their actions. These stories will also promote shared learning and raise awareness of the nature-positive economy. They also serve as valuable references for investors and funders, especially when supported by measurable outcomes such as the number of jobs created and the area of ecosystems restored. The increased recognition will also help these businesses identify as a 'nature-based enterprise'.

The Horizon Nua team will also seek out opportunities to share these success studies more widely with other project and network partners such as Network Nature.

Key finding 3: Nature-based enterprises are a hard-to-reach sector

From surveys, interviews and ongoing interactions with NBEs, it is observed that like many SMEs, these small businesses are often time-poor, and often resource-poor. Micro-enterprises are often dependent on one founder/owner who is generally the driving force behind the business. While perhaps a technical specialist, such owner-founders in NBEs are often seen not to possess the business development skills to scale a business. Combined with other factors such as isolation and fragmentation, exacerbated by differences in language, lack of participation in mainstream business networks, this makes NBEs a hard-to-reach stakeholder group.

Research has revealed that nature-based enterprises are a core stakeholder in the transition towards a nature-positive economy by contributing to job creation and ecosystem restoration. While there are promising possibilities for their growth, there is a gap in the support received by these businesses in terms of financing, investment and market development.

It is essential to collaborate with existing trusted intermediaries and ecosystem partnerships in this sector to effectively reach and engage with NBEs. We propose to address the growing problem of ‘platform fatigue’ by positioning CNEP as an ‘enabling infrastructure’ rather than a new platform. CNEP will collaborate with trusted platforms such as Climate Farmers and Agroecology Europe which have established links with sectoral NBEs. Where sector-specific associations do not already exist, the CNEP will explore the potential to replicate such models to fill the gaps.

Recommendations

The CNEP will engage and partner with pilot partners and trade associations and other industry networks already working with NBEs. This includes networks representing NBEs on a sector specific basis such as Climate Farmers or World Green Infrastructure Network (WGIN) to extend and amplify their reach. Such intermediaries who may operate at different levels – local, regional and sectoral – will have longstanding relationships with NBEs who often see themselves as community businesses or mission driven SMEs. By collaborating with intermediaries such as farmer cooperatives, environmental NGOs, destination management companies and other sectoral associations, CNEP will decentralise the reach of the platform and provide a pathway for gradual engagement with these businesses in familiar formats and language. The training and educational content provided through the platform will equip partner associations with resources that can be used to organise workshops and training sessions for their members and can be translated into their local languages. These pilots and partners will be invited to join train-the-trainer programmes where they will be enabled to deliver these sessions efficiently.

Working together with pilot partners and industry networks such as Climate Farmers and European Alliance for Regenerative Agriculture will allow CNEP to leverage their existing communities and relationships with these businesses. They can act as ‘bridging institutions’ between CNEP and the NBEs and work together with CNEP to improve the skillset of the NBEs they work with. They can also facilitate peer learning and sector-specific learning communities with content support from CNEP, to which they can make contributions through case studies, interviews and industry information.

The CNEP will also work with mainstream trade associations and industry networks to raise awareness of NBEs. We will encourage collaboration and knowledge sharing leading to increased recognition of NBE values and nature-positive practices in the deployment of NBS. We will strive towards systemic change in mainstream business practices.

Key finding 4: Language is a barrier to NBE scaling and growth

Europe is a continent with multiple national and local languages. While some countries have given importance to English alongside their local language, this is not the case everywhere. Nature-based enterprises are generally small and operate in local, regional and sometimes national markets and hence not all NBEs speak fluent English. For such enterprises, to engage with English language content and be active in events where all the content delivery is in English is a considerable barrier. Working through industry networks to acquire knowledge is the default. The language barrier also contributes to the low awareness of the term ‘nature-based enterprises’ as it may not translate well into local languages.

Recommendations

The platform allows sharing different types of content including market reports, blog posts and research journals, in different languages by integrating Google Translate API into the platform. CNEP will actively engage with industry associations, stakeholders and other project partners to get resources translated into local language to expand its reach. The GoNP! capacity building toolbox will be translated into at least three languages as well.

In addition to efforts to improve language accessibility via the CNEP and industry partners, we will also seek to increase the availability of information about NBEs in different languages via other online platforms such as the GoNaturePositive! website. During the initial consultation of the project, the concept note was already translated into 8 European languages to encourage wider uptake. Similar efforts will be taken to dissemination NBE content in different languages via the GoNP! website.

Summary:

1. Working closely with pilots and industry association partners (as per previous point), CNEP will facilitate translation of materials into at least three EU languages based on user requirements.
2. While retaining English as the primary language of the CNEP platform, we will integrate the Google Translate API into the CNEP to allow the translation of site-wide content from English to multiple languages.

Key finding 5: Nature-based enterprises require entrepreneurial knowledge and training to scale efficiently

The majority of nature-based enterprises fall into the categories of Small and Micro Enterprises, with less than 10 employees and limited funding and resources (Francesca et al., 2024). Most nature-based enterprises are founded by individuals with technical and subject knowledge, which means they will have a solid product/service offering. The Invest4Nature/NBS EduWorld NBE survey has identified ‘measuring impact’ and ‘financing and business models’ as two major skills gaps (see Figure 20) that NBEs require more support in terms of capacity building and skills development (Dowling, 2024).

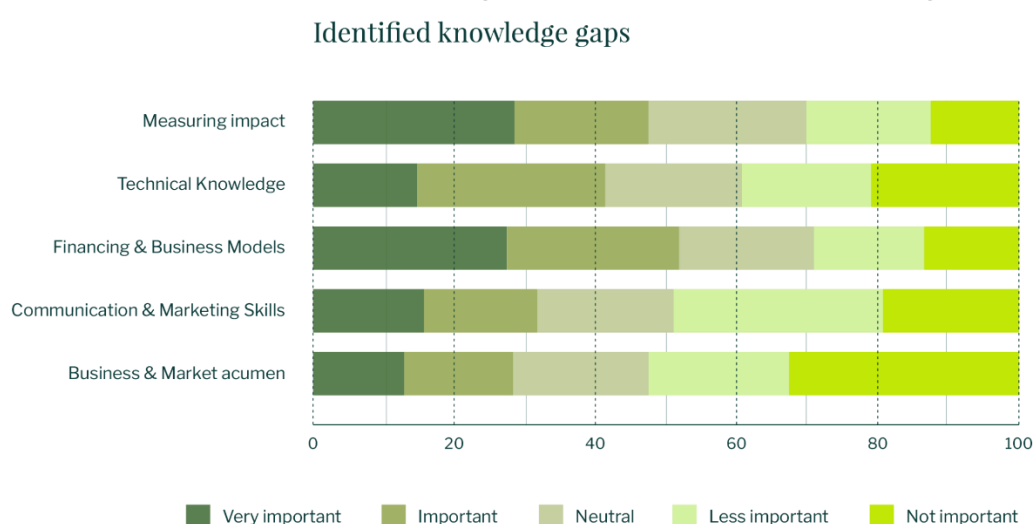


Figure 20: Measuring impact and Financing and Business models were the most important knowledge gaps identified

During one of the consultation calls, a representative from a national association of green buildings mentioned how entrepreneurial skills and knowledge are essential to scale successfully.

“In my opinion, there is a difference between the technical knowledge and the entrepreneurial knowledge, and a lot of enterprises need the entrepreneurial skills and knowledge to scale. It's not about the technical knowledge. It's about people. It's about having people in the enterprise who know how to scale...”

It often seemed harder for entrepreneurs, whose expertise was primarily technical, to develop their business skills to the requisite level, or to find business experts to partner with who shared their commitment to a purpose-driven mission.

The respondents of the survey also rated the current level of training and education available for NbS practitioners at 5.7 out of 10. This suggests a clear gap and need for CNEP to provide training/education for an underserved market.

Most NBEs are also risk-averse and prefer stability, considering their size, nature and limited resources. Thus, any entrepreneurial training must be tailored to the growth aspirations and needs of the majority of NBEs, whilst adapting to account for the training needs of a small number of fast growing, innovative NBEs.

Recommendation

Educational & Training materials with a focus of entrepreneurship and business development will be developed and disseminated.

The CNEP will continue offering CPD and training programmes for NBEs, delivered both online and offline, translated into at least three languages where feasible and required. These will cover topics such as business models, finance, strategy and impact measurement, with content tailored by size and sector. Courses will include sector-specific modules led by experts and feature pitch training to prepare NBEs for investor engagement. Findings from T5.2 and guidelines from T4.2 will be integrated to promote nature-positive standards. A tiered pricing model will make training affordable for NBEs while generating revenue for the platform.

The platform will provide articles, blogs, videos, toolkits, and templates based on project deliverables. Regularly updated content will help demystify the sector for investors and mainstream businesses, supported by visuals including infographics and real-life case materials. Promotional assets will also be available for NBEs to adapt for their outreach.

Key finding 6: More awareness needed for investors to understand NBEs.

Our research shows that while economic drivers are essential for the viability of nature-based enterprises, many NBEs are driven by hybrid goals. Economic goals are often seen as a means to an end with social and/or environmental of equal or higher priority. This can impact on investment interest as most investors continue to rely on conventional monetary methods of measuring return on investment.



A lack of standardisation and metrics to measure social, environmental and economic impacts from NbS implementation, and thus NBE performance, makes it difficult for investors to assess risk and return in NBEs. Concerns over potential greenwashing are a genuine barrier to investment. The founder and CEO of a forest products cultivation business mentioned that a lack of metrics is dissuading investors from investing in NBEs.

“Investors ... like to know that you’re doing something regenerative or ecological ... I think they don’t really know how to analyse that. They don’t really know who to trust – if you’re actually doing something good ... If there would be a model that you could plug your company into, and it would say you are scoring 95, you know, like ESG things, but ESG has all of its own problems, too... But I mean, if there was really an honestly, way to just do math on carbon sequestration, or some metrics that you can be more clear on, I think this would be actually helpful for these investors. But as of right now, there’s, there’s nothing and so it’s more of just a storytelling, and it’s a feel good thing.”

Many NBEs are small, early-stage businesses that are often perceived as high-risk or offering uncertain financial returns. The term ‘NBE’ is still unfamiliar to the investment community, and such enterprises often lack visibility or clear positioning. Their location-based, local impact models may seem hard to scale, and many NBEs are not pitch-ready, lacking the tools and training to communicate their value in investor terms. Limited investor awareness and confidence in the sector further compound these challenges.

From an NBE perspective, a perceived lack of alignment between investor interests and the hybrid goals of NBEs also leads to wariness and distrust among NBEs in mainstream financing and investment opportunities. While some examples of alternative modes of scaling and investment through mechanisms such as community based co-operatives and crowd-sourced membership exist, further research is needed on such approaches.

Recommendations

Several other Horizon Europe projects, such as Invest4Nature, BIOFIN and Merlin Market, are actively exploring the mainstream investment landscape for NBEs including alternative modes of financing and scaling. CNEP will work with these initiatives to present shared insights to investors, raising awareness of the sector’s growth and potential. CNEP will also partner with green accelerators and impact investment groups to ensure NBEs are given a platform. Knowledge-sharing sessions with investor organizations, alongside regular pitch training and competitions, will help



NBEs refine their value propositions. Ongoing engagement with the investor community will support NBEs in strengthening their business models and scaling more effectively.

Summary:

1. The CNEP will engage with the investment community as part of T3.3 to understand their challenges when it comes to investing in NBEs.
2. CNEP will collaborate with other European projects, such as Invest4Nature, A-Track, BioFin etc to better understand the investment landscape for NBEs and NbS including research on alternative modes of scaling and investment.
3. CNEP will reach out to Accelerator programmes such as the UNEP Accelerator and Bord Na Mona Green Accelerator to ensure NBEs are represented.
4. CNEP will develop and deliver pitch competitions and pitch training sessions in collaboration with investors and financial institutions .

Key finding 7: Nature-based enterprises want to collaborate with other NBEs to accelerate impact

The term ‘nature-based enterprise’ is still emerging, gaining recognition mainly among policymakers and academics. Due to varied market maturity across sectors and countries, many NBEs operate in silos, often unaware of the broader sectoral identity. Silos among NBEs create isolation, inefficiency and discouragement. While sectors like Green Buildings are more established, newer sectors like regenerative tourism need greater support. Sector-specific collaboration and cross-sector collaboration are essential to address fragmentation that stems from limited awareness and resources. Cross-sector cooperation can enable peer learning, reduce duplication of effort, and build momentum. A NBE founder mentioned how businesses can collaborate to expand their service offerings and not be limited by their size or resources.

“...I think that everything is quite disconnected... So it's not necessarily just doing the tree planting, but it's about creating that environment. So, you know, there's a lovely woman who does ponds, urban ponds, and yeah, and maybe the living lampposts, whatever they are, and the bat conservationists, you know - if we can all link up and work together. Like 'hey, this is what we need to create this'. So I think it needs to be more that, rather than this.”

- NBEF3³, Urban forestry business co-founder.

³ Interviewees are anonymised under Data protection and regulation

This interviewee emphasizes the need for NBEs to network and partner with peers to accelerate NBE growth and consolidate their impact. With many NBEs characterised as micro or small enterprises, collaboration could bring multiple benefits with respect to how impact could be scaled – from addressing issues with economies of scale and fragmentation of data; to bringing together complementary expertise to deliver a whole beyond the sum of the parts.

CNEP will actively engage with industry associations like EFB, Climate Farmers, and the Irish Seaweed Association to foster joint projects and partnerships. The transition to a nature-positive economy involves both integrating NBEs into mainstream supply chains and helping existing businesses adopt nature-positive models.

Recommendations

The Connecting Nature Enterprise Platform will organise matchmaking ‘marketplace’ events with the aim for NBEs to collaborate and work together to achieve successful projects.

Summary:

1. The Connecting Nature Enterprise Platform will organise and deliver both online and offline networking and matchmaking events to encourage collaboration between NBEs.
2. Through the ‘marketplace’ feature on CNEP, NBEs will be encouraged to list their needs and opportunities.

Example of Successful Collaboration between NBEs through CNEP



Figure 21: Vertical Garden installed in Malaga

Biotonomy & Bioazul

In 2023, two NBEs met on the CNEP and went on to develop and validate a prototype of a hydroponic vertical garden. Biotonomy and Bioazul met on the platform and collaborated on the project Vertical Ecosystem at the Mariposa Hotel in Malaga (Figure 21), which used an innovative irrigation system that reuses grey water from the hotel rooms to irrigate more than 2500 plants of 15 different species. The 100 m2 project, funded by the European Commission through the Metabuilding platform, has turned the hotel into a unique attraction in the neighbourhood.



Key finding 8: NBEs need improved indicators, metrics and standards to raise awareness of their nature-positive practices and to safeguard themselves from ‘greenwashing’

Some businesses that were interviewed as part of the Invest4Nature survey opined that the growth of the NbS market without proper awareness and quality standards might dilute the impact. NBEs expressed concerns about potential consequences of escalating demand for nature-based solutions in the context of current limited supply side capacity to deliver high quality NbS, and with many potential buyers not having enough information to distinguish between options based on quality. The CEO of an Environmental Consultancy Business observed a visible growth in the market but was apprehensive about the motives and intentions of companies entering this market.

“I think we’re in a blowing market. So opportunities are there. The problem is that you see that a lot of startups are opening up, especially coming from the digital sector ... they hire one or two foresters or something like that ... They support greenwashing approaches rather than having strong visions and skills and capacities to solve the real problems. So the risk [is] that we’ll see a lot of confusion ... because the market is - lack of knowledge to select the right provider, service provider, so a company nowadays is not able to judge the quality that [NBEF4] ⁴can provide or another provider can do ... a lot of companies will make decision on the budget on the most competitive price.”

A CEO of a Landscape Architecture business expressed a similar concern as they noted how a top-down push from the governments without enough qualified professionals will result in parties taking advantage of the opportunity, thus resulting in solutions that do not deliver.

“If... the European Commission ask countries to do things around nature based solutions, and countries ask municipalities ... we will not have enough professionals to deliver in a proper way the solutions... This is really a problem, because at the end, what will happen that a lot of companies arrive, because they will try to take advantage on this situation. A lot of new companies without knowledge. And what we can face is that we will address to buildings, solutions that will not work.”

⁴ Interviewees are anonymised under Data protection regulations

Recommendations

Nature-based enterprises are at the core of the transition towards a Nature-positive economy. They plan, deliver and maintain nature-based solutions. As such their products and services are impact-driven with a consideration for social and economic goals. Safeguarding the good work done by these businesses and helping them to gain visibility for the same will help them access funding and other resources required to scale. In GoNaturePositive! considerable efforts are being invested in developing and testing indicators to measure both the negative and positive impacts of businesses on nature. Partners like the World Benchmarking Association (WBA) will integrate such indicators into their Nature Benchmark to compare how nature-positive are the practices of large businesses. Horizon Nua will collaborate with INBO and WBA to explore the feasibility of testing these standards with NBEs. This will allow for the benchmarking of nature positive practices between mainstream businesses and NBEs. The CNEP will further engage with other EU projects and agencies to bring the attention of policymakers to the need for increased emphasis on indicators and metrics to differentiate between nature positive and negative business practices helping to mitigate against greenwashing.

Summary:

The Connecting Nature Enterprise Platform will explore the feasibility of leveraging existing or new frameworks, indicators and standards to meet NBEs requirements for quality assurance in the deployment of NbS.

5.1 Action Plan

This action plan aims to -

1. Improve visibility and recognition for NBEs and the good work they are doing.
2. Support scaling of NBEs through matchmaking between supply and demand.
3. Work closely with industry bodies and trade associations to address fragmentation and lack of representative organisations.
4. Support NBEs to overcome the existing challenges and hurdles to deliver better impact.

The overall objective of the Connecting Nature Enterprise Platform is to:

1. Increase awareness of nature-based enterprises among this community and other stakeholders in particular policy makers and the financing community.

2. Facilitate the development of the NBE ecosystem, collaborating with NBEs and their industry association to understand NBE needs and address them through capacity building and networking.

The action plan outlined below will help achieve these objectives systematically over the course of the GoNatureProject!

<u>Action 1: Restructuring of CNEP for enhanced NBE engagement</u>	
During this phase, the Connecting Nature Enterprise Platform will be redesigned to improve the user experience, in particular for NBEs, the industry associations representing them and mainstream industry associations. This action will help to bring more NBEs and industry associations to the platform to collaborate and network. This will also help in giving NBEs a collective voice to address their concerns and challenges.	
<u>Planned actions</u>	<u>KPIs & Timeline</u>
Develop CNEP branding, assets and guidelines for consistent visual identity and tone of voice, both online and offline.	New social media templates and newsletter templates to be developed by and launched before the end of 2025.
Implement updates to CNEP functionality to introduce consistency across communities for easy navigation.	Home page and community pages of 5 GoNP! Communities to be completed by the end of 2025.
Language and accessibility features will be integrated to increase accessibility of the platform.	Integrate Google Translate API to facilitate translation of the platform into a minimum 3 European languages.
In response to NBE challenges, more case studies and success stories will be featured	CNEP will develop a bank of NBE case studies and success stories (one every two months) in collaboration with pilots.
Keep the CNEP updated with relevant resources, reports, FAQs and success stories of NBEs	- A new FAQ section will be introduced on CNEP. This will address questions specific to communities as well as basic questions about the platform, its functionalities and services. This will be updated based on member requests. - The platform will have regular updates of market reports and other resources as and when released.
Develop a campaign to attract businesses who are unfamiliar with 'NBE' as a term	A separate campaign with newsletters and blog posts (bi-monthly) to connect with businesses who don't identify as

	an NBE. • By end of 2025, CNEP will develop an inclusive language with select keywords that will relate to these businesses to be used in all communication materials. • CNEP will engage with industry associations and networks such as Savory Hub Europe for outreach and dissemination.
<u>Action 2: Increase broad awareness and support for NBEs, in particular among policy-makers and the financial community</u>	
CNEP will establish relationships with other stakeholders such as national and EU Business platforms, other hubs, associated country initiatives and global initiatives and the investment community to support the scaling of NBEs. This action will contribute towards improved and increased awareness of NBEs in particular among policy makers and the financial community. Exploiting already existing networks, hubs and initiatives will help the platform and thereby the GoNP! project to reach out to this hard-to-reach sector outside of the scope of the pilots.	
<u>Planned actions</u>	<u>Timeline & KPIs</u>
Map & build relationships with industry and trade associations across 10 COPs to increase awareness about the NPE and the role of NBEs in driving the transition.	• Map sectoral associations, establish contact, and encourage them to join the platform, starting in 2026 e.g. engage with networks such as European Alliance for Regenerative Agriculture
Identify financial institutions, investors and other financing and scaling mechanisms relevant to NBEs to understand their motivations and challenges and collaborate on increased financing for scaling NBEs.	• In collaboration with other EU projects and networks, CNEP will distil a short-list of financial institutions, investors and other financing and scaling mechanisms and engage with them to address knowledge gaps (among both NBEs and financing community) through webinars (2/year, from 2026) • Networking/Matchmaking events to bring financing mechanisms and NBEs together to increase financing for NBE scaling (1 event per year, from 2026)
Horizon scanning flagship event (Nature Futures)- focus on the role of NBEs in NPE	One event per year (or a series of sector-specific events if more appropriate) over the duration of the project.
Knowledge sharing and peer-to-peer learning sessions to create more general awareness around 'nature-based	In collaboration with WP project partners, other projects and networks such as Network Nature, organise a recurring

enterprises' and nature-positive economy	webinar sessions with guest speakers (one every six months, starting in 2026). A specific emphasis will be placed on raising NBE awareness among the policy community in collaboration with WP5 partners.
Collaboration with networks to facilitate trusted intermediaries and ecosystem partnerships	Encourage pilots to organise events at different scales and levels (one per six months as part of WP activities) to build ecosystem partnerships.
A wide range of capacity-building programmes in collaboration with other work packages (within the project) and other Horizon Europe projects (outside the project)	In collaboration with GoNP! WP3 partners and other projects, organise training, workshops, pitch training, pitch competition (one every six months) to support NBEs becoming financing-ready from the end of 2026.
Blogs and articles around market trends, sectoral updates and other relevant developments	Pilots and partners will be encouraged to write blog posts on their related work packages and deliverables to increase dissemination. CNEP will also feature articles by guest writers to have in-depth analysis from their sectors (Internal – 1 article every quarter; external 1 every 6 months)
Action 3: Facilitate increased networking to accelerate the scaling of NBEs	
CNEP will take on the role of a facilitator to ensure engagement between the supply and the demand side of NBEs. This will support the scaling of NBEs while also giving them much-needed visibility. CNEP will leverage its already existing relationships with projects such as Invest4Nature and public organisations such as local authorities to encourage uptake of NbS and to collaborate with NBEs for the same.	
<u>Planned actions</u>	<u>Timeline & KPIs</u>
Networking/matchmaking events to increase engagement with NBEs to understand their product/service offerings	CNEP will encourage public and private entities to engage with NBEs to meet their needs during these events (one event per year, starting 2026)
CNEP will encourage members to list opportunities for NBEs	CNEP will encourage platform users to post relevant opportunities (starting 2026).
CNEP will work with mainstream businesses to identify possible NBE collaborations and encourage them to	Opportunities to engage with mainstream businesses will be listed on the platform, inviting proposals from NBEs. An invite-



engage with NBEs for a better uptake of NPE benchmarking	only competition will be held to select the final winner (one event per year).
<u>Action 4:</u> <u>Collaborate on indicators, metrics and standards to increase awareness of the nature-positive activities of NBEs</u>	
CNEP-specific actions for NBEs to support the take-up of Nature-Positive benchmarking on transformation will be devised in collaboration with the responsible Work Packages as part of WP1 (T1.2) , WP2 (T2.4) and WP4 (T4.1)	

6. Conclusion

This deliverable focuses on how the Connecting Nature Enterprise Platform (CNEP) can support the creation of a vibrant and growing community of nature-based enterprises as vital actors in the transition to a nature-positive economy. The CNEP will initiate conversations with NBEs and a range of key stakeholders to encourage collaboration and knowledge sharing across sectors. This will be achieved through a multi-faceted strategy that will cater to the needs of the project, NBEs and other stakeholder groups.

GoNP! pilot partners will be central to the platform's development strategy. Their knowledge on the ground of NBE needs and challenges will inform the content of promotional activities and lead to more engagement in platform activities such as webinars and capacity building.

The strategy for development of the Connecting Nature Platform will address major challenges and opportunities for NBEs emerging from research. While sector-specific terms will remain important for businesses delivering NbS, the term NBE will be framed as particularly useful for audiences such as policy makers, financing bodies and investors, to raise awareness of similar NBE activities, challenges and needs across multiple sectors.

Promotional activities will focus on attracting businesses from sectors such as agroecology, green buildings, among others, to unite under the collective label of 'nature-based enterprises' to address their issues with a stronger, unified voice. The action plan will contribute directly to T4.4 by addressing industry fragmentation and the lack of industry-wide representation. The new vision for the platform focuses on bringing together industry and trade associations across different economic sectors to strengthen nature-based enterprises as a sector and to encourage cross-sectoral collaborations. The platform will also facilitate ecosystem partnerships to create trusted, nurturing communities for NBEs. CNEP will also support replication of these activities in sectors that lack unified representation. This deliverable will also contribute to T4.5 by accelerating the NP transformation across sectors through collaboration and meaningful discussions across sectors.



The platform will address the challenges associated with the scaling and investment of nature-based enterprises from both ends. This means that CNEP will work with NBEs to improve their business case through training and workshops while also rigorously engaging with the financing and investment community to improve their awareness of NBEs and their role in biodiversity restoration.

To conclude, the term ‘nature-based enterprises’ has a long path ahead of it to evolve into becoming an all-inclusive term addressing different challenges and needs. However, it is essential to bring together this fragmented, but essential business community, who will be a key driver of the transition to a nature-positive economy through innovation, skills development and job creation.

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